



STATE OF THE DUTCH DATA CENTERS

2023

THE FACT
OF THE MATTER

COLOPHON

The State of the Dutch Data Center is an annual study initiated by the Dutch Data Center Association. The main focus is to provide a quantitative overview of the Dutch data center market, the Netherlands as Digital Gateway and the direct and indirect way the data center industry impacts the Dutch (digital) economy. The report is a combination of research exclusively done by Pb7 Research and the Dutch Data Center Association.

Edition

State of the Dutch Data Centers 2023:
The Fact of the Matter
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TABLE OF CONTENTS

Preface	5
Executive Summary	6
The European Regulation Storm	8
Overview Types of Data Centers	10
1. Dutch Market Research	12
Dutch Data Center Market	13
Colocation Data Centers	14
Hyperscale Data Centers	20
Sustainability	22
Employment	27
Summary	28
Data on Dutch Data Center Market	30
Research Methodology	31
2. Dutch Data Centers Market	32
DDA Data Centers	33
DDA Supplier Ecosystem	47
3. The Dutch Data Center Association	48
About DDA	49
Team .	50
Partners	52
Main Partners	54
Upcoming events & Recent Publications	55

“FACTS & FIGURES SHOULD BE THE BASIS FOR LEGISLATION, **NOT** **EMOTION**”



PREFACE

FACTS MATTER

The Age of Enlightenment popularized the use of reason to pursue knowledge, resulting in a society based on logic and science instead of relying on emotions and doctrine to make decisions. However, in current times, we see a trend away from the fundamentals of enlightenment, with decision-makers increasingly influenced by emotions rather than reason, and the data center industry experiences the consequences. As a result, the basis of the legislation is the most controversial headline and the accompanying emotions, with rules and regulations that do not align with the sector's realities, making it increasingly difficult for the data center sector to implement positive and sustainable changes.

It is the government's duty to ensure society functions at the best possible level, with rules to uphold fairness and provide everybody the opportunity to thrive. However, when facts are not considered, the playing field becomes unlevel. For example, headlines surfaced stating that data centers guzzle water, but the reality is that they use far less water than many other industries in the Netherlands. Yet, on multiple occasions, the government and politicians specifically call out data centers for their water consumption, disregarding the impact of higher water consumers from the conversation.

Consequently, organizations with a larger footprint are restricted to a lesser extent, thus not solving the actual problems. The use of facts is of utmost importance to solve the real problems our society faces, such as energy grid congestion, low water reserves, and inflation. There should be more emphasis on sectors that still rely on fossil fuels; those that have a high carbon footprint; and industries that are not on the top of the energy efficiency lists from the Netherlands Enterprise Agency (in Dutch: Rijksdienst voor Ondernemend Nederland, RVO). Facts should be the basis for legislation, not emotion.

In the 9th edition of the State of the Dutch Data Centers, we are returning to the essentials: the facts. The Fact of the Matter is that the sector is increasingly regulated by National and European law, making the sector's sustainable development more challenging. The Fact of the Matter is that the industry is working vigorously on becoming carbon neutral by 2030. And the Fact of the Matter is that the demand for data centers will continue to grow because our society is becoming more digital every day.

Stijn Grove
Managing Director
Dutch Data Center Association

**For more facts on the data center sector, and the sources to the above mentioned statistics, please consult our [factsheet](#), or our Dutch page with [statistics](#).*

BY 2026, 40% OF REVENUE
FOR TOP 2000 COMPANIES ARE
GENERATED BY DIGITAL
PRODUCTS & SERVICES

COLOCATION: TOTAL OF
791 MW POWER INSTALLED
AND 386.000 M² NET
SURFACE DATA FLOOR

99% GREEN ENERGY
% OF ENERGY THAT DDA
PARTICIPANTS USE COMES
FROM GREEN SOURCES

39% RESIDUAL HEAT
% OF DDA PARTICIPANTS
STORE AND/OR REUSE

>12.000 FTE
WORKING IN AND
AROUND DATA CENTERS

NUMBER ONE CHALLENGE
IS GETTING/MAINTAINING
ACCESS TO SUFFICIENT POWER

2023
THE FACT
OF THE MATTER
STATE OF THE DUTCH DATA CENTERS

EXECUTIVE SUMMARY

The Fact of the Matter

The 9th edition of State of the Dutch Data Centers focuses on presenting the facts of the data center industry. Facts are essential for government agencies to make informed decisions about data centers. Read about some of the most interesting facts from the report in this executive summary.

Total (net surface) datafloor 386.000 m² and total of 791 MW

While the data center moratoria in Amsterdam and Haarlemmermeer has lifted, the international interest, especially for wholesale data center space, has shifted away from the MRA and moved to other European locations. Between the end of April 2022 and 2023, the market experienced limited growth. The research shows that growth will pick up after two moderate years. New construction has begun, and there are many expansion plans.

Number one challenge is getting and maintaining access to sufficient power

Different types of colocation data centers experience different types of challenges. As we've seen over the past couple of years, data centers in the MRA typically struggle with getting access to sufficient power and finding engineers. Apart from that, sustainability and the negative sentiments are typically also high on the agenda.

Data centers outside of the MRA expect growth

This year, the growth in white space came from outside the MRA. For data centers outside the MRA growth opportunities are still prevalent, especially in the West (Zeeland, South Holland, Utrecht, North Holland - other than MRA) of the Netherlands and the North (Groningen, Drenthe, Friesland). In the North, data centers keep their momentum and even seem to accelerate further: 88% anticipate growth or even strong growth.

12.000 FTE working in and around data centers

All data centers combined, directly employ more than 5400 FTEs, and indirectly more than 12000 FTEs, as of May 2023. That is an increase of 3% compared to last year. The continued strong growth in the hyperscale market was counteracted by a slight decline in the enterprise sector and moderate growth in colocation.

99% of all energy consumed by colocation data centers is green

In 2023, 99% of all energy consumed by colocation data centers comes from green sources, compared to 90% in 2022. A small portion of that comes from Dutch wind and solar power.

39% of data centers stores and/or reuses residual heat

More and more data centers are distributing their residual heat, 39% of the respondents. The most common and relatively straightforward application is the extraction of 'data thermics' to heat the office space. As a next step, data centers move to heat adjacent office buildings. Extracting data center heat for heat networks is the 'holy grail' of data thermics. But some obstacles make this quite a challenge.

Data centers don't expect a sharp increase in water consumption

Data centers plan to move away from drinking water for cooling purposes and look for alternative sources. No data center is expecting sharp increases in water consumption. The trends that drive water consumption, such as the growing IT load and climate change, will partially be offset by allowing higher temperatures in data centers, cooling innovations, and cold returns from heat networks.

THE EUROPEAN REGULATION STORM

In the last twenty years, the data center industry went from non-existent to an instrumental sector, essential for people’s increasingly digital lives. The data center sector thrived with little regulation halting the fast growth. Consequently, the data center sector has reached a substantial size with a significant impact on its surroundings. The demand for data centers will not slow down in the coming years. Therefore, the European Union and national governments are increasingly regulating data centers. In the years to come, data center operators will see a storm of regulations coming their way. What are the positives of more oversight, and what are the dangers?

The acceleration and the sheer size of the digital transformation and energy transition create a perfect storm. In addition to other challenges, such as the increasing need for sovereignty in Europe and the labor shortage, the government and industries have the difficult task of handling these challenges simultaneously. This storm results in a tsunami of new rules and regulations coming towards the data center industry, potentially

overflowing the sector with paperwork and bureaucracy. The regulation tsunami will not have the desired effect unless it becomes more resourceful and pragmatic. Governments and industries should collaborate, share expertise, and develop legislation that creates actual change, not just legislation that looks appealing on paper or in the press. Otherwise, we will drown in bureaucracy without achieving the desired change.



CYBER SECURITY

- CYBER RESILIENCE ACT
- CYBER SECURITY ACT
- NIS2
- EUCS
- DIGITAL OPERATIONS RESILIENCE ACT
- DIRECTIVE ON RESILIENCE OF CRITICAL ENTITIES
- TERRORIST CONTENT ONLINE
- CHILD SEXUAL EXPLOITATION ACT



MARKET PROTECTION

- DIGITAL MARKETS ACT
- DIGITAL SERVICES ACT
- DATA ACT
- ARTIFICIAL INTELLIGENCE ACT
- DATA GOVERNANCE ACT



SUSTAINABILITY

- ENERGY EFFICIENCY DIRECTIVE
- CORPORATE SUSTAINABILITY REPORTING DIRECTIVE
- GIGABIT INFRA ACT
- F-GAS REGULATION
- EUROPEAN CHIPS ACT
- EU BATTERIES REGULATION
- ELECTRICITY MARKET DESIGN
- RENEWABLE ENERGY DIRECTIVE (REDIII)

ENERGY EFFICIENCY DIRECTIVE

The Energy Efficiency Directive wants to promote sustainable development in the IT sector, particularly of data centers. The directive states that EU Member States will collect and publish data on the energy performance and water footprint of data centers. The collected data establishes a data center sustainability indicator.

The data center sustainability indicators encompasses four basic dimensions, namely how efficiently it uses energy, how much of that energy comes from renewable energy sources, the reuse of any waste heat that it produces and the usage of freshwater. The data center sustainability indicators should raise awareness amongst data center owners and operators, the entire ecosystem, and data center customers. The goal is also to give confidence about the actual improvements following efforts and measures to increase the sustainability in new or existing data centers. Finally, it should be used as a basis for transparent and evidence-based planning and decision-making.

Member States shall require, by 15 March 2024 and every year thereafter, every data center owners and operators in their territory, with a energy consumption of more than 500kwh, to to publish the data, which Member States shall subsequently report to the Commission.

NIS2 DIRECTIVE

The NIS2 Directive is an extension of the first Network and Information Security Directive (NIS). This EU’s-wide cybersecurity legislation had the specific goal to achieve a high common level of cybersecurity in all Member States. To cope with the growing threats of digitization and the wave of cyber-attacks, the European Commission has put forward a proposal to replace the NIS Directive to strengthen security requirements, address supply chain security, streamline reporting requirements, strengthen oversight measures and more strict enforcement requirements, including harmonized sanctions across the EU.

The proposed expansion of the scope of NIS2, by effectively requiring more entities and sectors to act, would help raise the level of cybersecurity in Europe in the long term. It is not the size of your organization, but how essential its business activities are, that guides NIS2. NIS2 also focuses on the activities of the organization itself, and on the activities of all organizations with which it collaborates. If this includes an organization from an essential industry, they are designated as part of the NIS2 and must comply with the legislation. Furthermore, NIS2 will also impact the clients of data centers as they have to demonstrate compliance to data centers.

As for the management of cyber security risks themselves, the proposed revision maintains the open standard that “appropriate” and “proportionate” measures must be taken given the state of technology and the risk involved. What is new is the addition of a few minimum basic security elements that must be observed in any case. These include the following measures: risk analysis, incident handling, business continuity (backups, etc.), supply chain security, and more.

Reporting requirements are also extended. For example, all essential and major entities will be required to report on incidents that significantly impact the delivery of their services.

OVERVIEW TYPES OF DATA CENTERS

Many different types of data centers together make the online ecosystem work. A data center is an industrial high-security building built with one purpose: to ensure that computer servers with digital applications are always running, 365 days a year, 7 days a week, 24 hours a day. For example, a failure in the data center could cause the inability to pay with our bank cards. Luckily this rarely happens since professional data centers use the latest innovations in data infrastructure, cooling, power supply, and security. All these systems are redundant, meaning they are multi-tenant, and a spare connection compensates for one of these systems' failures.

Data centers can be multi-tenant or single-tenant. Alternatively multi-tenant is also called colocation data centers, and these colocation providers have made it their business model to facilitate other companies; their business model is to rent out data center space. On the other hand, single-tenant data centers accomodate data storage and processing needs of its own company. For example, a bank or government department that provides its own IT infrastructure in-house. Therefore, these data centers are also called corporate data centers.

The different types of data centers are typically categorized as follows:

	SINGLE TENANT	COLOCATION DATA CENTER			SINGLE TENANT
Type	PRIVATE/ENTERPRISE including server spaces	REGIONAL	NATIONAL	INTERNATIONAL	HYPERSCALE
Customers	SME Enterprise Public Semi-public	SME Public Semi-public	SME Enterprise Cloud Public Semi-public	SME Enterprise Cloud Cloud SaaS	Cloud SaaS
Space Impact	> 10 m2 Small	> 200 m2 Small	> 2000 m2 Small	> 5000 m2 Medium	> 5 ha Medium/Large
Energy Impact	0,01 - 10 MW Small	0,5 - 10 MW Small	1 - 10 MW Medium	> 5 MW Medium	> 50 MW Large
Location (approximity)	In every province	In every province	In (regional) hubs	Amsterdam hub	Outskirts

PRIVATE OR ENTERPRISE DATA CENTER

Data center that is only used for housing IT equipment from the owner ('single tenant'). The IT equipment may be used for internal purposes and/or to deliver services to customers.

A subcategory are micro data centers. These are small single tenant facilities (sometimes even multi-tenant) with typically between 2 and 15 server racks for compute, store and connect close to the edge. The energy consumption is limited as well and would typically range from 3 to 50 kW.

COLOCATION DATA CENTER

A data center that (partly) lets data center space on a regional, national and/or international market. Many data centers let space to regional, national and international customers, but the focus can vary. The following subcategories can be identified:

- **Retail colocation data centers:** Colocation focused on a letting to customers with a contracted capacity of less than 1 MW.
- **Wholesale colocation data centers:** Colocation focused on customers with a contracted capacity of 1 MW or more.

Within the wholesale group, we also distinguish the so-called built-to-suit data centers, in which a data center is built for and/or let to a single customer. Sometimes (but not by Pb7 Research) these data centers are also called hyperscale.

HYPERSCALE DATA CENTER

Very large single tenant data center (20 MW or more, single tenant campuses with more than 100 MW are not uncommon) of a major cloud provider or tech company (Alibaba, Amazon, Apple, Google, Meta, Microsoft, Tencent), from which this party offers digital services to its customers.

DUTCH DATA CENTER MARKET

This chapter provides a quantitative and qualitative overview of the Dutch data center market. It focuses on the colocation data centers, which rent out their data center space. Many of these data centers will also offer additional services such as interconnection, hosting, or IT services. Apart from colocation data centers, the report also quantifies enterprise data centers that house server racks for internal use and addresses hyperscale data centers. The following chapter looks at the growth trends and the sustainability themes, including energy use, energy efficiency, water, and recycling. Finally, this report provides insights into employment across various types of data centers.

The Dutch data center landscape

The Netherlands is a premier data center destination, boasting one of Europe's largest international colocation hubs in Europe. Strategically located in the Amsterdam region, data centers in the country enjoy exceptional connectivity, proximity to numerous multinational corporations and millions of consumers, and a favorable electricity price environment. The Netherlands has a remarkable density of domestic data centers, ensuring businesses can access professional colocation services within a 30-minute drive. In recent years, the data center landscape has witnessed the emergence of hyperscale facilities beyond the confines of Amsterdam, with notable players such as Google and Microsoft establishing their presence.

However, the journey for data centers in the Netherlands has been fraught with challenges in recent years. For example, the electricity infrastructure in and around Amsterdam continues to face congestion issues and is unable to keep pace with the rapid electrification of the economy. In addition, decentralized power generation and the growing demands of energy-intensive industries, including data centers challenge the growth of data centers. As a result, local municipalities have introduced growth restrictions on new data center developments, followed by further regulation from

the provinces and the national government. In addition, public concern about landscape changes and power consumption has limited the ability of hyperscale data centers to expand. Residents and politicians often fear these facilities because they could divert (renewable) energy resources from other stakeholders in the area.

In response to these challenges, the data center industry continues implementing sustainability practices and proactively has embarked on a journey to minimize its carbon footprint. Most new data centers in the Netherlands boast impressive Power Usage Effectiveness (PUE) ratings and more data centers are investing in heat recovery initiatives. Additionally, data centers are exploring innovative solutions to reduce power and potable water consumption.

This annual study aims to delve into the intricacies of the data center landscape in the Netherlands, providing valuable insights into its growth trajectory, prevailing challenges, and sustainability efforts. By examining the current situation and outlook, this research aims to provide businesses, policymakers, and investors with a comprehensive understanding of the data center industry in the Netherlands. Ultimately, this will enable them to make informed decisions regarding their digital infrastructure strategies and policies.

COLOCATION DATA CENTERS

Last year's study found that growth in the Dutch colocation market had slowed significantly. While the data center moratoria in Amsterdam and Haarlemmermeer has lifted, the international interest, especially for wholesale data center space, has shifted away from the MRA and moved to other European locations. Compared to last year, 2023 shows a similar development. Between the end of April 2022 and 2023, the market experienced limited growth. During this time, white space increased by approximately 5000 m². This growth comes from outside the Metro Region Amsterdam (MRA), mainly due to two new additions by NorthC Datacenters.

The growth of only 1% is lower than the 4% forecast in last year's State of the Dutch Data Centers report. The main reason for this difference is the delay of several data centers, which were not delivered in the last twelve months as planned. In addition, several wholesale data center projects currently under development have postponed their delivery dates. As a result, some of the more speculative projects aimed at attracting hyperscale investment outside the MRA have lost momentum.

The retail colocation market continues to perform well compared to the wholesale segment. In the MRA, data centers continue adding modular expansions within their existing shells to meet

growing customer demand (note: our market data does not reflect these expansions). The regional colocation data centers continue to expand, with new facilities planned for the remainder of 2023 and beyond. Interestingly, the hosting providers that offer colocation are returning to building their own data center facilities. A key reason is the increased focus on delivering cloud services to local customers with data sovereignty concerns. As a result, over the past 12 months, more colocation data center operators were added than lost to consolidation. All of the additions are local initiatives. Overall, the number of operators is back up to 100, and the number of facilities (data centers) has increased to 189.

Table 1: Sizing the Dutch colocation data center market

	2018	2019	2020	2021	2022	2023
Gross surface M ² (incl. office space, etc.)	506.000	571.000	650.000	713.000	762.000	792.000
Net surface M ² (data floor)	267.000	328.000	353.000	369.000	377.000	386.000
Data center facilities (#)	198	189	189	184	185	189
Colocation providers (#)	118	111	102	96	97	100

Over the next few years, this report identifies 143,000 m² of new data center projects. The number of plans is 26% lower compared to a year ago. The main reason is the removal of approximately 72,000 m² of projects because these plans became highly speculative and unlikely to materialize. On the other hand, several market leaders in the MRA and Eemshaven (excluding

vendor-owned hyperscales) added significant expansion plans. 78% of new projects, in terms of the data floor, are planned for the MRA. These developments indicate that the growth will increase over the next few years in line with continued customer demand. However, in all likelihood, only a limited number will be operational within the next 12 months.

COLOCATION DATA CENTERS

Pb7 Research forecasts that data floor space will grow at a moderate but healthy compound annual growth rate (CAGR) of nearly 7% annually. Power growth is significantly higher, at roughly 9% per year. The research shows that growth will pick up after two moderate years. New construction

has begun, and there are many expansion plans. However, the MRA will likely continue to underperform the other FLAP-D markets and Tier 2 data center hubs such as Warsaw, Madrid, and Milan.

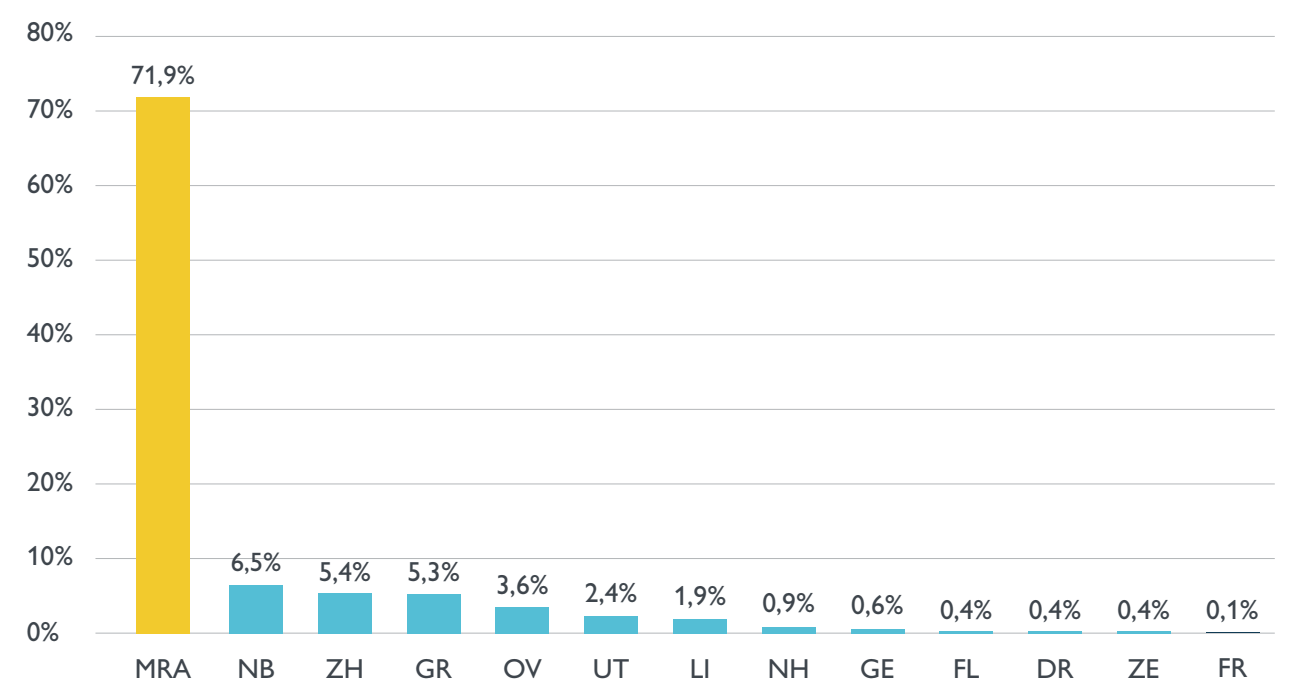
Table 2: Dutch data center market, data floor (1000 m²), IT power (MW), 2023 - 2028

	2023	2024	2025	2026	2027	2028	CAGR 2023-2028
Data floor (1000 m ²)	392	416	449	486	525	531	6,6%
MW	807	873	969	1079	1197	1210	8,9%

As no new locations opened in the MRA in the past twelve months, the Amsterdam region has a low regional share (1%) compared to other Dutch areas. However, in the coming years, growth in the MRA will, once again, outpace the other Dutch regions. Momentarily, the MRA's share of the total Dutch market remains at 72%. Nonetheless,

given the relative size of the Dutch market, this also implies a significant penetration of colocation data centers in the different provinces. North Brabant (Eindhoven), South Holland (The Hague/Rotterdam metropolitan area), and Groningen (city of Groningen and Eemshaven) have considerable colocation data center footprints.

Figure 1: Colocation data center floor space (net m², % of total), by province



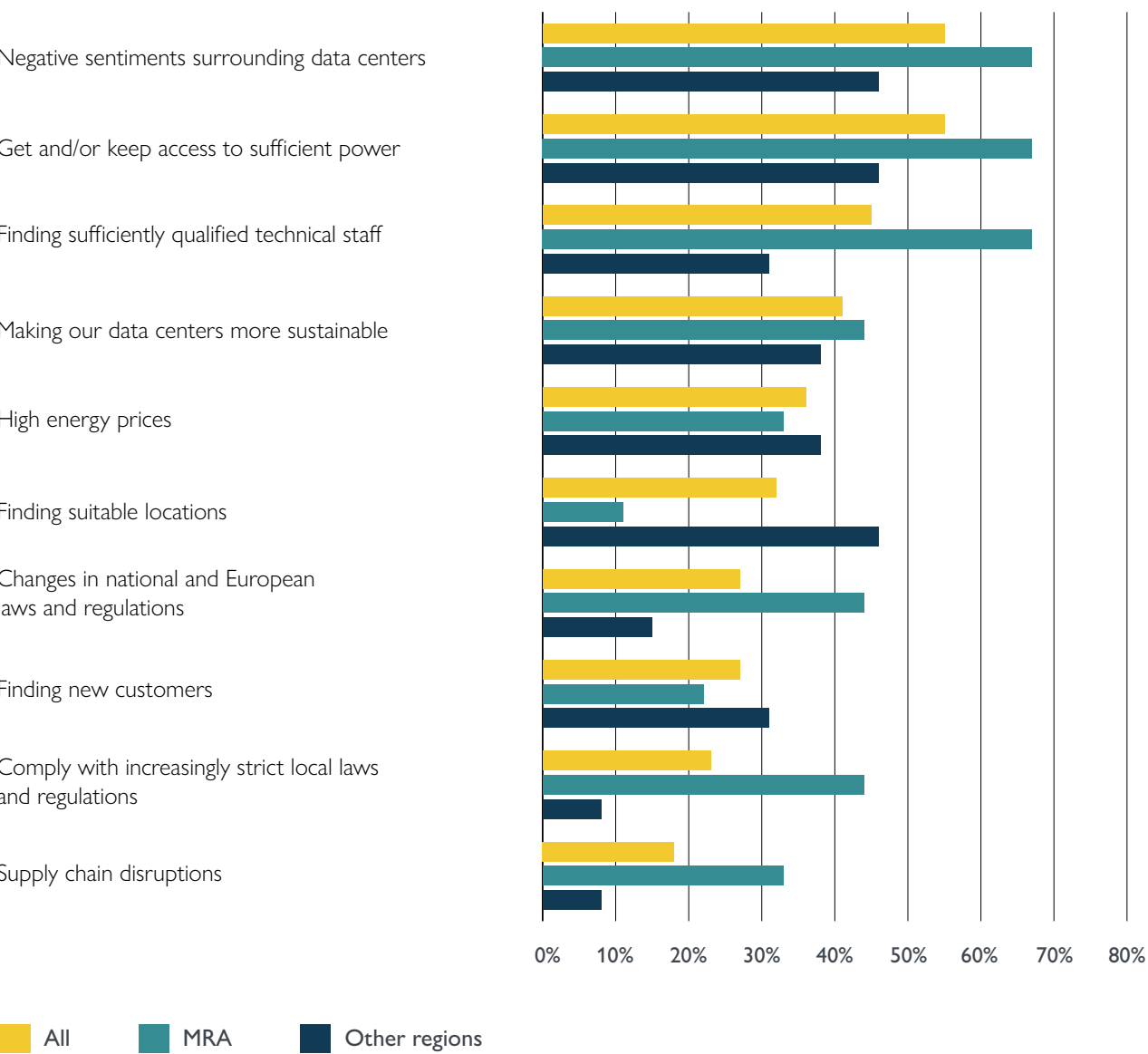
COLOCATION DATA CENTERS

Key challenges

Different types of colocation data centers experience different types of challenges. As we've seen over the past couple of years, data centers in the MRA typically struggle with getting access to sufficient power and finding engineers. Domestic

data centers, especially those in other regions, typically see the biggest challenge in finding new customers. Apart from that, sustainability is typically also high on the agenda. This year, these challenges remain true for the members of the DDA (see figure).

Figure 2: Biggest challenges for data centers in the MRA and other regions (compared)



COLOCATION DATA CENTERS

There are several reasons for these challenges. Firstly, the growing impact of negative sentiment towards data centers are also starting to affect regional data centers. Last year, these sentiments reached a boiling point with the public debate about the now-abandoned plan for the Meta data center in Zeewolde. Not only did the controversy put a dent in the sector's image, but it also triggered regulation. In 2022, new regulation emerged at the national level - including a preparatory act that limited permits for new hyperscale data centers to Hollands Kroon and Eemshaven. In addition, key cities such as Amsterdam and Haarlemmermeer have been leading the way for some years, are restricting the potential locations for new sites,

and introducing sustainability guidelines such as maximum power usage effectiveness (PUE) and residual heat usage for new facilities. Last year, the debate moved to many other municipalities with data center concentrations, such as the city of Groningen. Whereas previously, data centers in the MRA were the only ones affected, now the effects are being felt across the Netherlands. As a result, data centers in the MRA and outside the MRA now experience this as the number one challenge. In addition, compliance, both local and international, is moving to the top of the list. For now, this primarily impacts data centers in the MRA, but eventually, it may also affect regional data centers.

“THE GROWING IMPACT OF THE **NEGATIVE SENTIMENT** TOWARD DATA CENTERS IS ALSO STARTING TO **AFFECT REGIONAL DATA CENTERS**”

The second challenge is the congestion of the power grid. The war in Ukraine amplified the issue. Last year, the high energy prices were quickly becoming a big challenge. While that is still at the top-5 of challenges, the concern shifted towards even getting access to power. Power networks are congesting all across the country, as electrification of the economy has become a very high priority, seemingly out of nowhere. One thing is clear: it will take quite a few years before the energy grid can supply the demand to allow for the electrification of society. Even small regional data centers increasingly encounter challenges when trying to expand.

demand for technical skills is rising sharply across all sectors, competing for talent in the same pools. In the MRA region, this struggle is more significant, where the competition for technical skills is the fiercest and the demand the biggest.

Finally, the awareness that sustainable growth is the only way forward, has become widespread across the data center sector. Last year, the survey uncovered that sustainability had gained importance for regional data centers, approaching the same level as MRA. To some part, this is a reaction to the criticism the sector has received over the past couple of years. However, it is also a realistic view of the way forward for data centers and, increasingly, a valuable way to differentiate since sustainability is quickly becoming one of the primary selection criteria.

Thirdly, the Netherlands currently has a very tight labor market. Especially true, already for some years, for technical jobs. Even a significant economic downturn will not take this challenge away. The

COLOCATION DATA CENTERS

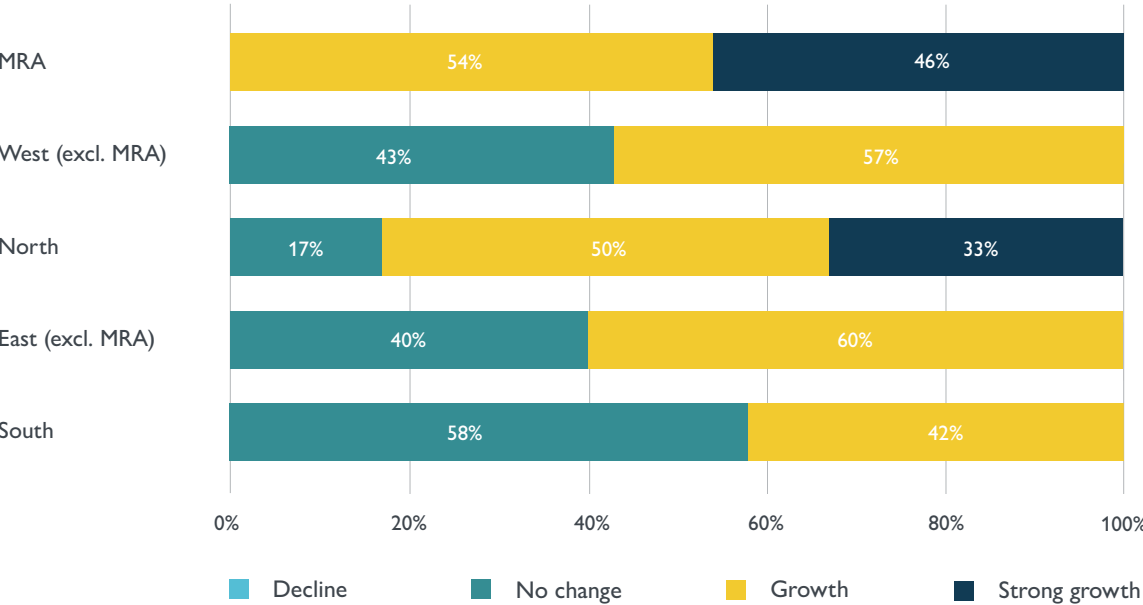
Regional growth

Most colocation data centers in the MRA primarily focus on the international market. Most data centers in other regions predominantly target the domestic market- at both national and local levels. Customers typically include domestic IT services providers, local ISVs, the local public sector, SMBs, and enterprises. That doesn't mean all domestic data centers are the same. Some focus strictly on colocation and connectivity. But many others have a more diverse portfolio that may include hosting, cloud services, or office automation. Some focus on a specific region, while others create a national network of data centers.

Historically, growth did not come as naturally to a domestic data center as to internationally oriented data centers in the MRA. Last year, this report discovered that domestic data centers anticipated significantly more growth compared

to previous years. With the growth limitations in the MRA and increased domestic demand on the back of the Covid pandemic, many domestic data centers noticed a surge in demand. This report no longer encountered clear pockets of decline. Instead, growth opportunities are prevalent, especially in the West (Zeeland, South Holland, Utrecht, North Holland - other than MRA) of the Netherlands and the North (Groningen, Drenthe, Friesland). In the North, data centers keep their momentum and even seem to accelerate further: 88% anticipate growth or even strong growth. In other regions, there is continued optimism. However, also some tempered expectations for further expansion. Additional data centers acknowledge limited anticipated growth in the East (Overijssel, Gelderland, Flevoland, other than Almere), the South (Noord-Brabant and Limburg), and the West. Despite this sentiment, there are sufficient growth opportunities in accomplished economic regions such as Eindhoven.

Figure 5: Expected revenue growth or decline per region



On the other hand, the MRA data centers have become more optimistic about the growth prospects. All active data centers in the MRA anticipate growth or even strong growth. For now, (most) data center operators seem happy with the

space offered by Amsterdam and Haarlemmermeer between now and 2030. Substantial projects are emerging, while there is a halt on plans to move to Flevoland (Almere, Zeewolde).

COLOCATION DATA CENTERS

Growth by service type

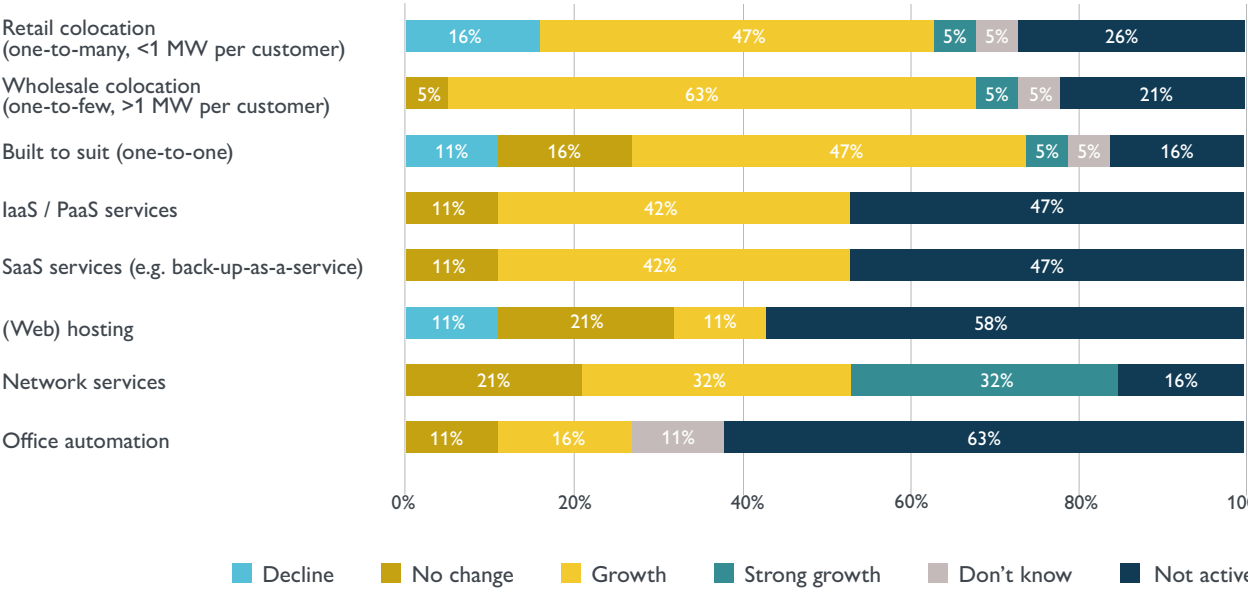
For nearly all multi-tenant data centers, colocation is their core service offering. Most of the data centers surveyed offer both retail and wholesale colocation solutions. Surprisingly, a larger number said to provide built-to-suit (although it is expected several respondents may have interpreted that differently from the intended purpose: building a complete facility for a single customer). Data centers anticipate continued growth in all these areas, sometimes even strong growth. Compared to last year, the wholesale colocation market is having a resurgence with a great deal of possible development. Still, the times of strong growth seem to be in the past for most operators.

It is common for colocation services to be combined with network services, such as fiber network services, cloud on-ramps, and interconnection.

With the growing distribution of workloads as a result of the trend to move data closer to the user (the edge), these networking solutions are quickly becoming more important. Data centers focusing on interconnection often see strong growth, while data centers fixed on more traditional connectivity have conservative expectations.

For medium-sized and small domestic data centers, growth in colocation does not always come naturally. Like many other companies, organizations that have moved their servers into a colocation facility want to migrate additional workloads into the cloud. As a result, the required rack space becomes smaller over time. In response, data centers continue to move into IaaS and PaaS services. For more traditional IT services, such as office automation and web hosting, the outlook is much more cautious and somewhat pessimistic compared to a year ago.

Figure 6: Expected growth or decline in revenue per activity



HYPERSCALE DATA CENTERS

There are different definitions of hyperscale data centers in the market. At Pb7 Research, built-to-suit facilities that colocation providers have specifically built for a single customer, for example, a hyperscale cloud provider, are not included in this analysis. Instead, only the hyperscale facilities built by hyperscale providers “themselves” are included. Thus, for the Netherlands, the Google data centers in Eemshaven and Hollands Kroon and the Microsoft data centers in Hollands Kroon.

The past 12 months have been quite eventful for hyperscale data centers. Meta withdrew its plan to build a new 200 Megawatt data center in Zeewolde. The project attracted negative attention from the local population and national media. A growing number of (local) politicians and administrators tried to stop or slow down the process. Despite the benefits for the local government in terms of taxes and employment potential, the concerns about the impact on the landscape, the perceived lack of local value, and the (renewable) power usage became dominant. Meta revealed that they never want to build somewhere at a location where they are not wanted, and canceled the project.

Directly as a result of the debate, the Minister for Housing and Spatial Planning published a preparatory act, later followed by a draft decree, stating that no new hyperscale facilities (10 hectares of land, 70 MW or more) will be allowed, except for the existing hyperscale locations in Hollands Kroon and Eemshaven. That leaves room for hyperscale operators to develop strategies for smaller campuses spread across more locations. And it may also push hyperscale operators more to colocation/built-to-suit options in the Netherlands



Google data center in Eemshaven | Source: Google

HYPERSCALE DATA CENTERS

In the meantime, Microsoft continues to be committed to expansion in Hollands Kroon. Microsoft is incorporating the lessons learned from the local debate in Hollands Kroon and across the Netherlands. They continue to be committed to local initiatives to support technical and non-technical purposes with a local impact. Microsoft is integrating more into the landscape and focusing on further improving sustainability, including water usage. Similarly, Google continues to be committed to Eemshaven and is trying to expand at least one other location in the Province of Groningen, with permits obtained before the date of the hyperscale preparatory act.

Hyperscale data centers are not the only locations where hyperscale cloud vendors reside. They also rent colocation space and drive the market for built-to-suits. The demand from these parties has been the biggest driver for colocation growth in the Netherlands (and anywhere else, for that matter). In the coming years, the cloud will continue to drive the demand. Increasingly, hyperscale operators are looking for a more distributed network of data centers. Bringing data

centers closer to customers, sometimes referred to as the edge strategy, improves the quality of the service (low latencies!) and meets the growing demand for data sovereignty.

This report also needs to address the topic of AI. With the spectacular take-off of generative AI, cloud providers are anticipating a rapid take-up. This increase will have an enormous impact on the computing and storing capabilities. The expectation is that primarily the cloud is utilized for these innovations. As a result, the demand for High-Performance Computing (HPC) is likely to explode. Not every cloud provider has the same strategy, but overall it will lead to significant growth in high-density computing. Consequently, data centers need a lot more power per rack, and different types of cooling, moving from free air-based solutions to liquid cooling. Thus, data center design is entering new territories, making it the right time to discuss the potential footprint in terms of energy usage. The good news is that residual heat will become much more attractive to implement.

“THE **DEMAND FROM HYPERSCALE** CLOUD VENDORS HAS BEEN THE **BIGGEST DRIVER** FOR **COLOCATION GROWTH** IN THE NETHERLANDS”

SUSTAINABILITY

All facilities combined, data centers in the Netherlands have an IT capacity of over 1500 megawatts. A decade ago, approximately 50% of the IT capacity belonged to enterprise data centers, a common situation in many other countries. In 2023, this is down to only 17%. For a long time, the growth of colocation data centers has been the main reason for this decrease. Today, colocation data centers are responsible for 51% of all data center IT capacity in megawatts. But the hyperscale data centers (now 32% of all megawatts) added the most amount of megawatts over the past 12 months.

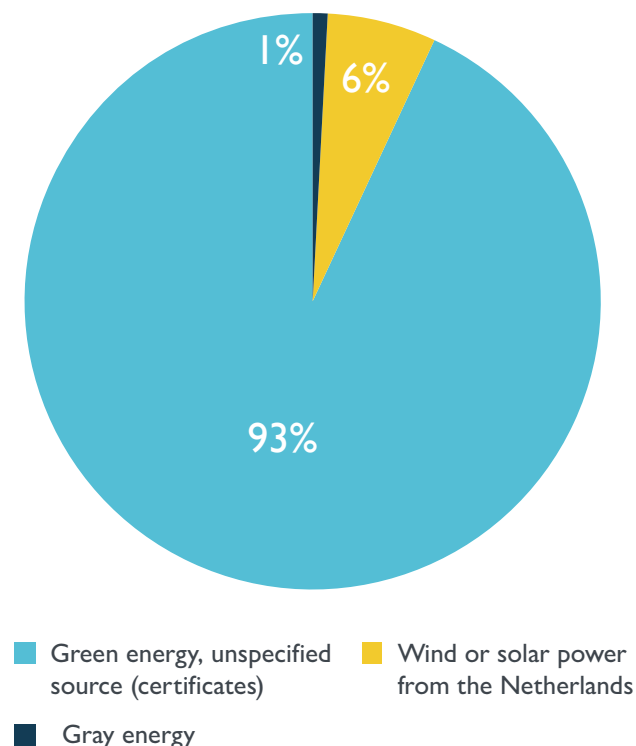
The discussion surrounding the electricity consumption of data centers is still prevalent. Additionally, data centers are increasingly criticized for using other resources, such as drinking water and space. However, compared to the national consumption of energy, and even more true for water and space, data centers still have a modest footprint. Challenges are more likely to arise in areas with a high concentration of data centers, such as in the MRA or at the hyperscale campus.

Despite the public image, most data centers are mindful of using resources responsibly. They have invested in energy efficiency from very early on and continue to do so. Buying green energy is the standard for most data centers, and they are moving to local renewable energy as the next standard. Further, data centers in the Netherlands are looking into delivering their residual heat to communities and have put alternatives to drinking water on the agenda. To show its commitment, the Dutch Data Center Association (DDA) and many of its members have committed themselves to the Climate Neutral Data Center Pact (CNDCP), intending to become climate neutral in 2030, well ahead of other sectors.

In 2023, 99% of all energy consumed by colocation data centers comes from green sources, compared to 90% in 2022. A small portion of that comes from Dutch wind and solar power. Surprisingly,

it is a lower percentage compared to 2022. This year's number may be more realistic because data centers are more aware of their energy source. The major colocation providers have Power Purchase Agreements (PPAs) for purchasing renewable power, but often at other locations, since they are purchased internationally. For next year's survey, the categories should be re-examined. Nevertheless, the colocation sector is more advanced compared to other sectors in using renewable energy.

Figure 7: Different variants of energy consumption



SUSTAINABILITY

Compared to colocation and hyperscale data centers, many enterprise data centers do not share the same concern about their climate footprint, although we have seen an increase in awareness in some of Pb7's other surveys. Especially for organizations with smaller server rooms and no separate contracts for data center power, the issue of energy efficiency is not high on the agenda. Since these types of data centers often have relatively high PUEs, the consolidation trend that drives organizations to colocation facilities has a positive lowering effect on the overall climate footprint of data centers.

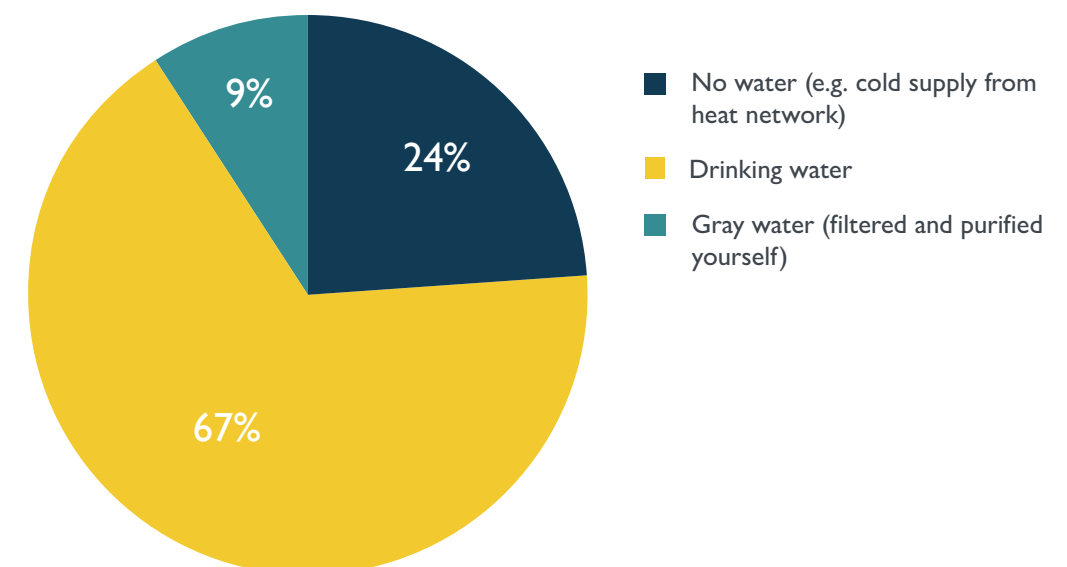
Water

Most modern colocation (and hyperscale) data centers are cooled using computer room air handlers (CRAHs) and chillers with optimizers for

free air cooling. On hot days they add water-based (adiabatic) cooling to keep things cool. There is a delicate balance between water and power usage: cooling without water requires more power; using more water can lower the overall power consumption. Therefore, the call to reduce data center water consumption should be informed by nuanced knowledge. While it makes sense to reduce the dependence on drinking water – a data center needs most water in the summer when drinking water may be scarce, reducing the water usage to zero is often not the most sustainable solution. Alternatively, data centers can look into other water sources, such as collecting and storing rain, grey/industrial water where available, or cold returns from heat networks.

“THERE IS A **DELICATE BALANCE** BETWEEN WATER AND POWER USAGE: COOLING **WITHOUT WATER** REQUIRES **MORE POWER**; USING **MORE WATER** CAN **LOWER POWER CONSUMPTION**”

Figure 9: Different variants of water consumption



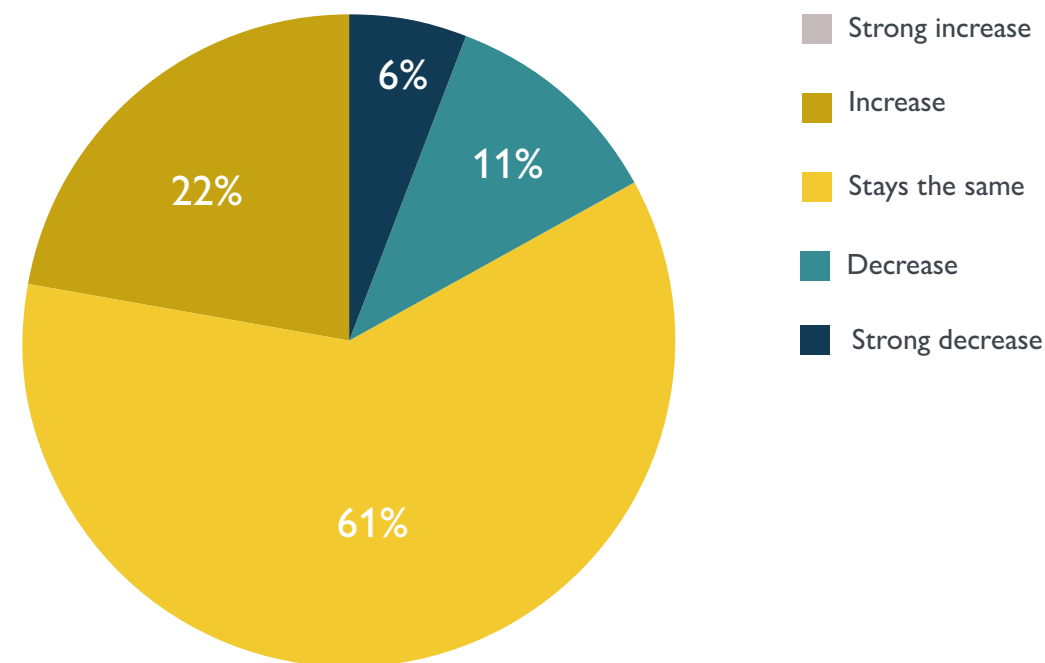
SUSTAINABILITY

24% of all surveyed data centers indicate that they use no water (or in the form of a cold supply). Most of these facilities are located in the MRA. About one in ten (9%) use grey water, filtered and purified by the data center. Again, this is very uncommon outside of the MRA. Most data centers (67%) still rely on drinking water, 88% of

the colocation data centers outside the MRA, and 56% in the MRA.

Many data centers use water in the cooling process. In most cases, they are using drinking water. A small group of data centers uses “grey water”(filtered surface water) or collected rainwater.

Figure 9: Expected consumption of water for cooling purposes over the next 5 years



“DATA CENTERS PLAN TO **MOVE AWAY FROM DRINKING WATER** FOR COOLING AND LOOK FOR **ALTERNATIVE SOURCES**”

Only 22% of the data centers expect an increase in water usage. The proportion of data centers that expects a decrease is even smaller (17%). Last year, 2 in 5 data centers anticipated lower water consumption. Furthermore, data centers plan to move away from drinking water and look for alternative sources and no data center is expecting sharp increases in water consumption. The trends

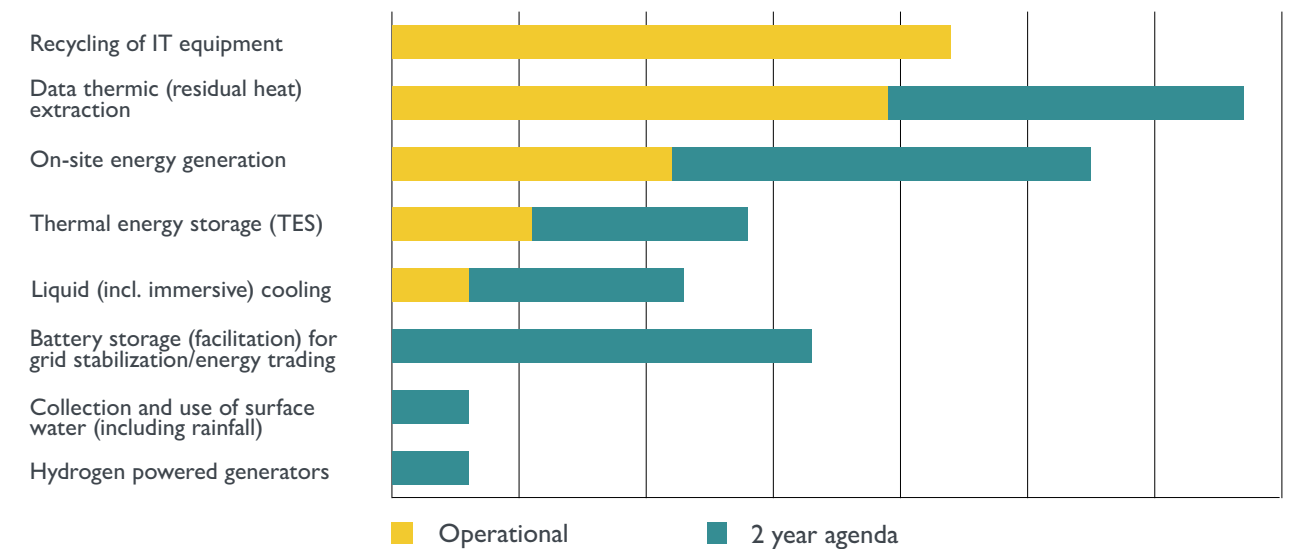
to drive water consumption, such as the growing IT load and climate change, will partially be offset by allowing higher temperatures in data centers, cooling innovations, and cold returns from heat networks. However, there are examples of data centers that plan to increase water usage to reduce power usage.

SUSTAINABILITY

Sustainability Initiatives

Most modern colocation (and hyperscale) data The previous paragraphs analyzed the trends in electricity and water consumption. Many sustainability initiatives in data centers are not only related to water and power.

Figure 10: Operational sustainability initiatives (now and within 2 years)



Residual heat

More and more data centers are distributing their residual heat, 39% of the respondents. The most common and relatively straightforward application is the extraction of ‘data thermics’ to heat the office space. As a next step, data centers move to heat adjacent office buildings. Extracting data center heat for heat networks is the ‘holy grail’ of data thermics. But some obstacles make this quite a challenge. For example, the heat is of relatively low quality, therefore it needs to be heated up further. Furthermore, the heat loss can be substantial when it is transported over a large distance, or there may be no heat network near a data center. Still, we have seen more projects emerge across the country. And with new data center regulation that demands new data centers to make waste heat available, it is expected to increase. 28% of the respondents have put it on the agenda for the next two years. Another way to deal with heat, which can be a part of data thermic solutions, is the consumption of thermal energy storage (TES) systems. It is currently in use by 11%, and 17% have it on the agenda for the short term.

Water

The previous paragraph discussed water consumption and the growing need to replace drinking water with alternatives. One of the options mentioned is collecting and storing surface water, such as rain. This option seems to best suit hyperscale data centers operating on relatively big campuses, with lots of potential for collection. If we look at the activity from colocation data centers, it may be more of a challenge. No respondents are storing surface water already, and this method is rarely on the agenda for the next two years.

SUSTAINABILITY

Cooling

Some changes are occurring at the level of IT equipment as more liquid-cooled chip sets emerge in the market. Also, liquid cooling is becoming more common on the rack level, especially in high-density environments. As a result, equipment needs less electricity to cool, and the output temperature is significantly higher. Consequently, the heat is more interesting for reuse in communities. Last year, liquid cooling became a more important topic. At the same, only 6% claim to have liquid cooling operational, and it is on the agenda for the coming two years with just 17%. Many data centers may be interested, but the difficulty is introducing it widely in most existing data centers. Therefore, it will take quite some time before it is commonly available.

Power generation and storage

Power initiatives include on-site power generation, battery storage, and hydrogen-powered generators. So far, on-site energy generation, typically solar power, has been most commonly embraced (22%). Adding solar panels is a quick win for many facilities. As a result, another 33% of the respondents have the implementation of solar panels on the agenda for the coming two years. Another power initiative is hydrogen-powered generators, which are seen as relatively new. Currently, one location uses hydrogen for emergency power supply. Last year, there was a great deal of interest in this solution. The interest may still be there, but hydrogen will not impact the sector hugely over the next two years. In the meantime, we see a growing interest in biodiesel as an alternative fuel for backup generators in data centers. That may also slow down the transition to hydrogen. The growing interest in battery storage to facilitate grid stabilization and engage in power trading can function, when big enough, as an alternative to generators. The solution is not just beneficial to data centers but can help improve the availability and sustainability of power for power companies and other users as well. One in three Dutch data centers has battery storage on the agenda.

Recycling

Colocation customers are responsible for the operations of the equipment. They are in control when we talk about the overall IT value chain and are responsible for the sustainability, or the lack thereof, of applications, computing, equipment, and operations. In recent years, colocation data centers have greater awareness and willingness to educate customers and collaborate with them for the sustainable use of IT equipment. For example, the LEAF project focuses on the improved application of power savings settings. In addition, many data centers (44%) have set up programs for recycling. Although numerous data centers are offering recycling, there seems to be little desire at the moment from others.

The list of sustainable initiatives is far from exhaustive. As mentioned previously, the LEAP project and biofuels. Other respondents note moving towards the limits of what is “ASHRAE” allowable for climate (temperature and humidity), design simplification, or optimization to reduce the PUE.

EMPLOYMENT

All data centers combined directly employ more than 5400 FTEs, and indirectly more than 12000 FTEs, as of May 2023. That is an increase of 3% compared to last year. The continued strong growth in the hyperscale market was counteracted by a slight decline in the enterprise sector and moderate growth in colocation. The enterprise sector still employs almost half of all data center FTEs (48%). Employment in enterprise data centers is slowly decreasing as enterprise data centers continue to consolidate and workloads move into the cloud. Over the next five years, we anticipate a decline of 2% per year.

The colocation and hyperscale market segments continue to show growth. Over the last 12 months, the number of employees increased by 4% for colocation data centers and 17% for hyperscale data centers. This is a much lower percentage for both sectors compared to last year. Growth

in colocation slowed down in some parts due to relatively slow demand. But there have also been some reductions in overhead. Hyperscale data centers continue to grow and hire rapidly, but the percentages get smaller as the sector achieves a bigger scale.

Table 3: Employees (FTE) in data centers in the Netherlands, 2022-2023

	2022	2023	Growth
Colocation (multi-tenant)	1895	1965	4%
Hyperscale	765	895	17%
Enterprise	2650	2600	-2%
Total employees	5310	5460	3%

“GROWTH IN THE HYPERSCALE MARKET WAS COUNTERACTED BY A SLIGHT DECLINE IN THE ENTERPRISE SECTOR AND MODERATE GROWTH IN COLOCATION”

In Q3 of 2023, the Dutch Data Center Association will publish a new study, based on research performed by Pb7 Research, on the Dutch data center labor market. The study will provide an update of the 2021 study, with more quantitative

details, forecasts on the size of the labor market (direct and indirect), insights into the key trends and challenges, and potential solutions in areas such as inclusion & diversity and education.

SUMMARY

The Dutch colocation market has experienced slowed growth, with international demand for wholesale data center space declining and moving to other locations in Europe. The market has only seen limited growth, adding just over 5,000 m² of white space between April 2022 and 2023. The growth rate of 1% is lower than the previously forecasted 4% due to delays in the delivery of data center projects.

The retail colocation market is performing better than the wholesale segment, with data centers in the Amsterdam region adding modular expansions to meet customer demand. The challenges faced by data centers include negative sentiments, power access, skills shortages, and sustainability concerns. The report concludes that sustainable growth and compliance with regulations are key factors for the future success of data centers.

There has been an increase in colocation data center operators, with the number of operators reaching 100 and the total number of facilities increasing to 189. However, the growth in the Dutch market is expected to be lower in the coming years compared to previous forecasts. New data center plans have been identified for 143,000 m², which is 26% less than the previous year. The main challenges for data centers include negative sentiments towards the industry, access to power, skills shortages, and sustainability concerns.

Regional data centers are experiencing growth opportunities, particularly in the West and North of the Netherlands. The North region, including Groningen, is seeing strong growth, while other areas show optimism but tempered expectations.

Data centers in the Amsterdam region remain optimistic about growth prospects. Colocation remains the core service offering for most data centers, with wholesale colocation showing growth potential. Networking solutions, such as fiber network services and interconnection, are becoming increasingly important due to the hybrid cloud trend.

The past year has seen significant events in the hyperscale sector, with Meta abandoning plans for a data center in Zeewolde due to local opposition and new restrictions on permits for hyperscale data centers. At the same time, we see continued investments by Google and Microsoft driving continued growth.

In terms of employment, the data center industry in the Netherlands has seen moderate growth. As of May 2023, the sector employs over 5,400 full-time employees (FTEs), representing a 3% increase compared to the previous year. The enterprise sector employs nearly half of all data center FTEs, but its employment is slowly declining as workloads move to the cloud. Colocation data centers have experienced a 4% growth in employees, while hyperscale data centers have seen a significant 17% increase.

SUMMARY

Sustainability

The data center landscape in the Netherlands has seen a significant shift in recent years. Colocation data centers have witnessed substantial growth, accounting for 51% of all data center IT capacity in megawatts. On the other hand, enterprise data center share has decreased to 17%. Hyperscale data centers have experienced the most growth in terms of megawatts added in the past year, now comprising 32% of the total.

Sustainability is a key concern for data centers. Most data centers prioritize energy efficiency and have invested in green energy, with 99% of the energy consumed by colocation data centers being green in 2023. Water usage is another area of focus for data centers. While it is common to use drinking water for cooling, data centers are exploring alternative water sources such as rainwater, greywater, and cold returns from heat networks.

Dutch data centers are involved in many initiatives to improve sustainability. These include recycling programs, on-site power generation (such as solar power), battery storage, reuse of residual heat, and cooling innovations. While there is progress, some initiatives are still in the early stages or face challenges in implementation. Data thermics, on-site solar power, and battery storage are getting much traction.



“COLOCATION REMAINS THE CORE SERVICE OFFERING FOR MOST DATA CENTERS, WITH WHOLESALE COLOCATION SHOWING GROWTH POTENTIAL”

DATA ON DUTCH DATA CENTER MARKET

Table 4: Total amount of Dutch data centers

Nationwide								
Data floor (m²)	Colocation Companies	%	Enterprise Companies	%	Hyperscale Companies	%	Total Companies	%
10-100	36	36%	5.020	94%			5.056	93%
100-399	15	15%	209	4%			224	4%
400-9.999	39	39%	94	2%			133	2%
10K-19K	5	5%	3	0%			8	0%
20K or more	5	5%	1	0%	2	100%	8	0%
Total vendors	100	100%	5.327	100%	2	100%	5.429	100%
Total Facilities	189		6444		3		6636	

MRA

Datafloor (m2)	Colocation Companies	Facilities	Enterprise Companies	Facilities	Hyperscale Companies	Facilities	Total Companies	Facilities
>100	28	56	41	48	0	0	69	104

Table 5: Total Dutch data center data floor surface

Nationwide								
Data floor (m²)	Colocation Agg. Total (m²)	%	Enterprise Agg. Total (m²)	%	Hyperscale Agg. Total (m²)	%	Total Agg. Total (m²)	%
10-100	1.510	0%	73.292	26%			74.802	12%
100-399	3.378	1%	42.120	15%			45.498	7%
400-9.999	112.037	29%	107.915	38%			219.952	33%
10K-19K	65.846	17%	37.500	13%	16.000		103.346	15%
20K or more	203.417	53%	20.600	7%	105.000	87%	224.017	34%
Total vendors	386.188	100%	281.427	100%	121.000	100%	667.614	100%

MRA

Data floor (m²)	Colocation Agg. Total (m²)	% of Total NL
MRA	276.887	72%

Table 6: Total Dutch data center power

Nationwide				
MW Power	Colocation	Enterprise	Hyperscale	Total
	791	269	490	1550

RESEARCH METHODOLOGY

The research is based on desk research and an anonymous survey among data center decision-makers among the members of the Dutch Data Center Association (DDA). The DDA has 31 members who offer colocation, which represents 91% of the Dutch colocation data center market in terms of square meters of data floor, plus one hyperscaler. 27 of the members completed the survey about growth and sustainability. The desk research has focused on mapping individual colocation and hyperscale data centers. For this purpose, Pb7 Research used publicly available sources and online searches.

After identifying the colocation data centers, we check the current status via every individual website and do a double check based on addresses. We remove data centers that went out of business, have changed owners, have other double counts, or no longer offer colocation (from a proprietary data center) and add data center locations that were not listed in other sources. We had to estimate the net floor space for a limited number of data centers as there was only information about the number of racks (0,5 per m2) or the gross surface.

While the overview of data center space per location was complete, we had information about the power capacity (MW) for about 50% of the colocation data centers and a small group of enterprise data centers. By calculating the averages per m2, we quantified the total capacity for colocation data centers. The total capacity for enterprise data centers required more modeling and estimates for especially small data centers.

About Pb7 Research

Pb7 Research is an independent ICT research firm. We provide independent research and advice, aimed at the successful deployment of new technology in the European market, with a key focus on the Dutch market. Pb7 supports technology marketers and strategists by identifying and analyzing market and competitive opportunities and challenges, technology buyers in making well-informed decisions and we help policymakers with key statistics and market insights. Pb7 Research is a specialist in IT security, data center infrastructure and services, cloud, edge and IoT, and other emerging technologies.

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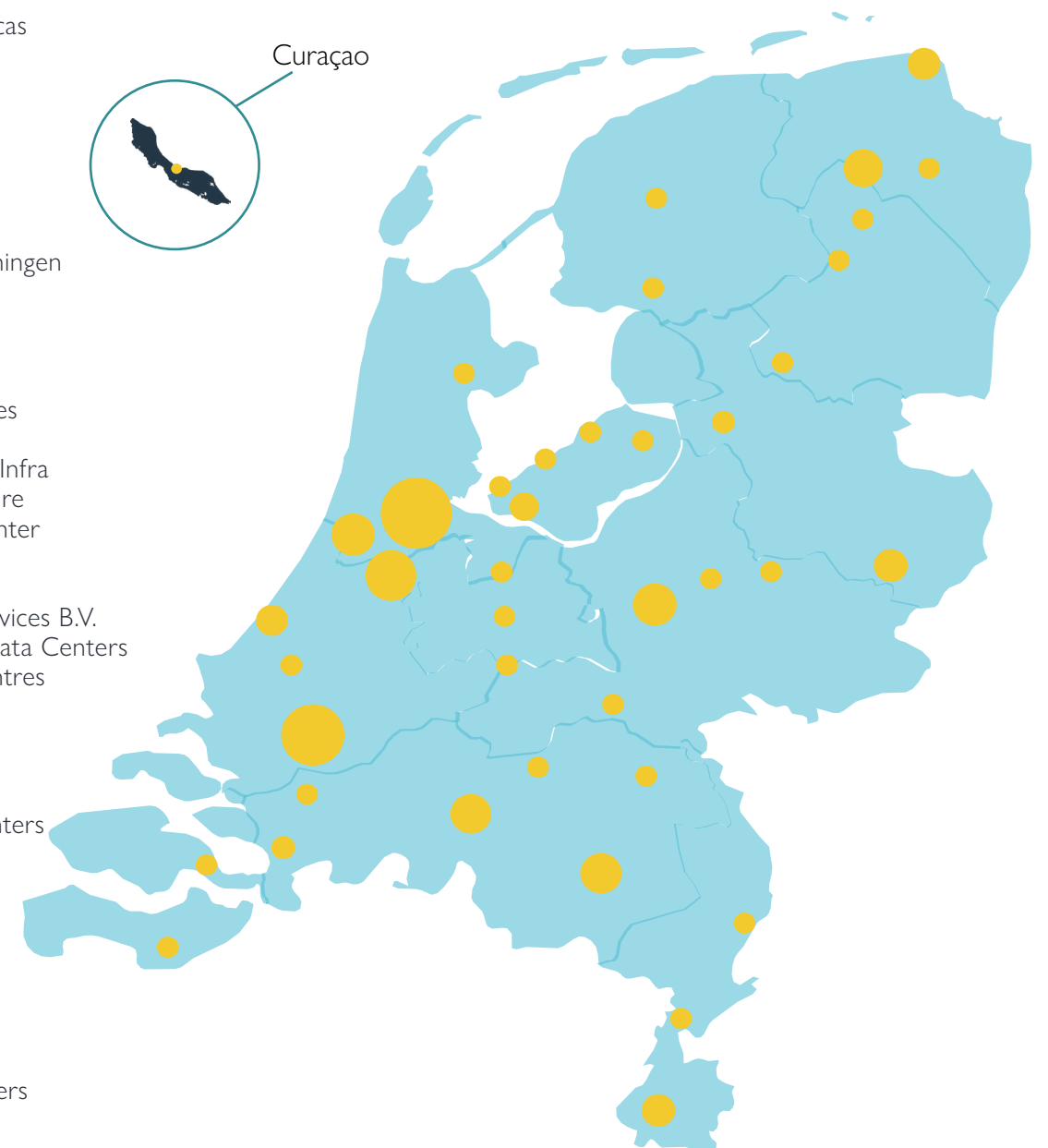
Website: www.pb7.nl

2 DUTCH DATA CENTER MARKET

DUTCH DATA CENTERS

DDA Data Center Participants

Atlas Edge
Blue Nap Americas
Bytesnet B.V.
Cellnex
Cegeka
Colt B.V.
ColoHouse
CloudHQ
CyrusOne
Datacenter Groningen
DELTA fiber
DFDC
Digital Realty
EdgeConneX
EQUANS Services
Equinix
Eurofiber Cloud Infra
EXA Infrastructure
Global-e Datacenter
Global Switch
Google
Interconnect Services B.V.
Iron Mountain Data Centers
Keppel Data Centres
Lumen
Maincubes
Microsoft
Nikhef Housing
NorthC Datacenters
NTT
Penta Infra
Previder
QTS
Serverius
Serverfarm
SilverFalcon
Smartdc
Switch Datacenters
Systemec
Yondr



DUTCH DATA CENTERS



Website: www.atlasedge.com
E-mail: contact@atlasedge.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Amsterdam Oud-Zuid	Luchtvaartstraat 1C	1059 CA	Amsterdam	0 - 1000	500 - 1000	1 - 10
Amsterdam Duivendrecht	Van der Madeweg 12	1099 BT	Amsterdam	1000 - 2500	500 - 1000	1 - 10



Website: www.bluenapamericas.com
Phone: +59998630022
Email: info@bluenapamericas.com

Location	Address	Zip code	City
Blue NAP Americas	Kaya Seru Mahuma z/n,	0000	Willemstad (Curacao)



Website: www.bytesnet.nl
Phone: +31(0)103070440
Email: info@bytesnet.nl

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Spaanse kubus	Schuttevaerweg 48	3044 BB	Rotterdam	1000 - 2500	200 - 500	1- 10
d'Root	De Bunders 1	9747 AX	Groningen	2500 - 10000	500 - 1000	10 - 20



Website: www.capitaland.com/
Phone: +44 (0) 7444 742 947
Email: vance.davis@capitaland.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Amsterdam	Paul van Vlissingenstraat 16	1076 EE	Amsterdam	2500 - 10000	1000+	10 - 20



Website: www.cegeka.com
Phone: 0318 410 000
Email: info@cegeka.nl

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Datacenter Hasselt	Universiteitslaan 9	3500	Hasselt (BE)	0 - 1000	0 - 200	0 - 1

DUTCH DATA CENTERS



Website: www.cellnextelecom.nl
Phone: +31 (0)88 205 4400
Email: datacenters@cellnextelecom.nl

Location	Address	Zip code	City
Datacenter Alphen aan den Rijn	Energieweg 4	2404 HE	Alphen aan den Rijn
Datacenter Amsterdam	Barbara Strozilaan 251	1083 HN	Amsterdam
Datacenter Den Haag	Louise Henriëttestraat 385	2595 BK	Den Haag
Datacenter Eys	Eyserbosweg 27	6287 NE	Eys
Datacenter Gemert	Hemelsbleekweg 15	5425 PB	De Mortel (gemeente Gemert)
Datacenter Goes	Cornelisweg 10	4463 AK	Goes
Datacenter Haarlem	A. Hofmanweg 1	2031 BH	Haarlem
Datacenter Hilversum	Witte kruislaan 47A	1217 AM	Hilversum
Cellnex Media Gateway	Koos Postemalaan 2	1217 ZC	Hilversum
Datacenter Hoogersmilde	Van veenstraat 24	9423 VB	Hoogersmilde
Datacenter IJsselstein	Hogebiezendijk 21	3401 RS	IJsselstein
Datacenter Ittervoort	Hunsel/Branskamp 16	6014 CB	Ittervoort
Datacenter Lelystad	Oostvaardersdijk 2	8244 PA	Lelystad
Datacenter Loon op Zand	Finantien 4	5175 NW	Loon op Zand
Datacenter Maastricht	Trichterbaan 170	6215 XZ	Maastricht
Datacenter Markelo	Larenseweg 58	7475 PX	Markelo
Datacenter Megen	Ravensteinsedijk 2A	5368 LB	Megen
Datacenter Mierlo	Torenweg 1	5731 CJ	Mierlo
Datacenter Roermond	Op de meuleberg 7	6041 NK	Roermond
Datacenter Roosendaal	Melis Stokelaan 25	4707 HP	Roosendaal
Datacenter Rotterdam	Anthony Fokkerweg 40	3088 GG	Rotterdam
Datacenter Tjerkgaast	Gaestdyk 3	8522 MV	Tjerkgaast
Datacenter Ugchelen	Otterloseweg 110 a/p	7339 GZ	Ugchelen
Datacenter Wormer	Eenhoornweg 1	1531 ME	Wormer
Datacenter Zwolle	Bergkloosterweg 62	8034 PP	Zwolle



Website: www.coltdatacentres.net
Phone: +31(0)208882020
Email: dcsinfo@colt.net

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Roosendaal	Argonweg 9	4706 NR	Roosendaal	2500 - 10.000	1000+	20+

DUTCH DATA CENTERS



Website www.cyrusone.com
Phone +31(20) 899 0895
Email info@cyrusone.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
CyrusOne Amsterdam 1	Linieweg 1	1165 AA	Halfweg	10.000+	-	20+



Website www.cloudhq.com
Phone +44 203 880 5201
Email sales@cloudhq.com

Location	City
Schiphol-Rijk	Amsterdam



Website www.datacentergroningen.nl
Phone +31(0)507630515
Email info@datacentergroningen.nl

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Datacenter Groningen	Beneluxweg 4	9636 HV	Zuidbroek	0 - 1000	0 - 200	0 - 1



Website www.deltafibernederland.nl
Phone 088 002 02 00
Email sales@deltafiber.nl

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Goes 1A (GS1A)	Jenny Weijermanweg 10	4462 GB	Goes	0 - 1000	0 - 200	1 - 5
Goes 1B (GS1B)	Jenny Weijermanweg 24	4462 GB	Goes	0 - 1000	0 - 200	1 - 5



Website <https://dfdc.io>
Phone +31 (0)88 2700 200
Email sales@dfdc.io

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Data Facilities Data Centers	Moezel 5	2491 CV	Den Haag	0 - 1000	0 - 200	0 - 1

DUTCH DATA CENTERS



Website www.digitalrealty.com
Phone +31(0)208807600
Email nl.info@interxion.com

Locatie	Adres	Postcode	Stad	Space (M²)	Racks	Power (MW)
AMS 1-4	Gyroscoopweg 58-60	1042 AC	Amsterdam	0 - 1000	0 - 200	0 - 1
AMS 3	Cessnalaan 1-33	1119 NJ	Schiphol-Rijk	2500 - 10.000	1000+	1 - 10
AMS 5	Tupolevlaan 101	1119 PA	Schiphol-Rijk	2500 - 10.000	1000+	1 - 10
AMS 6	Koolhovenlaan 25	1119 NB	Schiphol-Rijk	2500 - 10.000	1000+	1 - 10
AMS 7	Cessnalaan 50	1119 NL	Schiphol-Rijk	2500 - 10.000	1000+	10 - 20
AMS 8	Pudongweg 37	1119 NX	Schiphol-Rijk	2500 - 10.000	1000+	10 - 20
AMS 9	Science Park 121	1098 XG	Amsterdam	1000 - 2500	500 - 1000	1 - 10
AMS 10	Pudongweg 25	1119 NX	Schiphol-Rijk	10.000+	1000+	20+
AMS 15/16	Jan Wijsmullerdreef 10	2132 PW	Hoofddorp	10.000+	1000+	20+
AMS 17	Science Park 120	1098 XG	Amsterdam	2500 - 10.000	1000+	1 - 10
AMS 18	Wenckebachweg 127	1096 AM	Amsterdam	2500 - 10.000	1000+	1 - 10



Website www.edgeconnex.com
Phone +1 (866) 304-3217
Email EMEA@edgeconnex.com

Location	Address	Zip code	City	Space (M2)	Power (MW)
EMEA Office Schiphol-Rijk	Koolhovenlaan 12	1119 NE	Amsterdam	2500 - 10.000	20+



Website www.eurofibercloudinfra.com
Phone +31 30 242 8720
Email sales@eurofibercloudinfra.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Datacenter Rotterdam	van Coulsterweg 6	2952 CB	Alblasserdam	2500 - 10.000	500 - 1000	1 - 10
Datacenter Utrecht	Koningin Wilhelminaweg 471	3737 BE	Groenekan	2500 - 10.000	500 - 1000	1 - 10
Datacenter Arnhem	Tivolilaan 251	6824 BV	Arnhem	1000 - 2500	200 - 500	1 - 10
Datacenter Brabant	Gragtmanstraat 1B	5145 RA	Waalwijk	0 - 1000	200 - 500	1 - 10
Datacenter Nedzone	Drukkerij 6	4651 SL	Steenbergen	2500 - 10.000	500 - 1000	1 - 10
Datacenter Amsterdam	Parellaan 9	2132 WS	Hoofddorp	2500 - 10.000	500 - 1000	1 - 10

DUTCH DATA CENTERS



Website www.equans.nl
Phone +31(0) 88 484 5338
Email datacentersolutions.nl@equans.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
EQUANS Datacenter Maastricht	Amerikalaan 35	6199 AE	Maastricht	2500 - 10.000	500 - 1000	1 - 10
EQUANS Datacenter Landgraaf	Minckelersstraat 2	6372 PP	Landgraaf	1000 - 2500	0 - 500	1-10



Website www.exainfra.net
Phone 020 454 6700
Email info@exainfra.net

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
EXA Amsterdam	Koolhovenlaan 120	1119NH	Schiphol-Rijk	2500 - 10.000	500 - 1000	1 - 10
EXA Zandvoort	Rob Slotenmakestraat 11	2041 KN	Zandvoort	0 - 1000	200 - 500	1 - 10
EXA Utrecht	Sterrenbergweg 42A	3769 BS	Soesterberg	1000 - 2500	200 - 500	1 - 10
EXA Rotterdam	Vlaardingenweg 62	3044 CK	Rotterdam	0 - 1000	200 - 500	1 - 10



Website www.equinix.nl
Phone +31(0)207537950
Email marketingNL@eu.equinix.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Equinix AM1	Luttenbergweg 4	1101 EC	Amsterdam	2500 - 10.000	1000+	1 - 10
Equinix AM2	Luttenbergweg 4	1101 EC	Amsterdam	2500 - 10.000	1000+	1 - 10
Equinix AM3	Science Park 610	1098 XH	Amsterdam	2500 - 10.000	1000+	10 - 20
Equinix AM4	Science Park 610	1098 XH	Amsterdam	10.000+	1000+	20+
Equinix AM5	Schepenberweg 42	1105 AT	Amsterdam	2500 - 10.000	1000+	10 - 20
Equinix AM6	Duivendrechtsekade 80A	1096 AH	Amsterdam	2500 - 10.000	1000+	10 - 20
Equinix AM7	Kuiperberweg 13	1101 AE	Amsterdam	2500 - 10.000	1000+	1 - 10
Equinix AM8	Gyroscoopweg 2E-F	1042 AB	Amsterdam	2500 - 10.000	1000+	1 - 10
Equinix AM11	Lemelerberweg 28	1101 AH	Amsterdam	10.000	500 - 1000	1 - 10
Equinix EN1	Auke Vleerstraat 1	7521 PE	Enschede	1000 - 2500	200 - 500	1 - 10
Equinix ZW1	Telfordstraat 3	8013 RL	Zwolle	1000 - 2500	200 - 500	0 - 1

DUTCH DATA CENTERS



Website www.global-datacenter.nl
Phone +31(0)161888877
Email info@global-datacenter.nl

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Global-e Datacenter-nlri 1	Haansbergseweg 12	5121 LJ	Rijen	0 - 1000	0 - 200	0 - 1
Global-e Datacenter-nlri 2	Europaweg 5	5121 DC	Rijen	0 - 1000	0 - 200	0 - 1



Website www.globalswitch.nl
Phone +31(0)206666300
Email salesamsterdam@globalswitch.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Amsterdam West	Johan Huizingalaan 759	1066 VH	Amsterdam	10.000+	1000+	20+
Amsterdam East	Johan Huizingalaan 759	1066 VH	Amsterdam	10.000+	1000+	20+



Website <https://www.google.com/intl/nl/about/datacenters/locations/eemshaven/>

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Google Agripoort	Agripoort 109	1775 TA	Middenmeer	-	-	-
Google Eemshaven	Oostpolder 4	9979 XT	Eemshaven	-	-	-



Website www.interconnect.nl
Phone +31(0)738800000
Email sales@interconnect.nl

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Eindhoven	Park Forum 1041	5657 HJ	Eindhoven	2500 - 10000	1000+	1 - 10
's-Hertogenbosch	De Steenbok 1	5215 MG	's-Hertogenbosch	1000 - 2500	200 - 500	1 - 10
Soon						
's-Hertogenbosch	Het Sterrenbeeld 55	5215 MK	's-Hertogenbosch	2500 - 10000	1000+	1 - 10

DUTCH DATA CENTERS



Website www.ironmountain.com/datacenters
Phone +31(0)203165170
Email datacenters@ironmountain.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Iron Mountain AMS1	J.W. Lucasweg 35	2031 BE	Haarlem	2500 - 10.000	1000+	10 - 20
Iron Mountain AMS2	J.W. Lucasweg 35	2031 BE	Haarlem	2500 - 10.000	1000+	1 - 10
Iron Mountain AMS3	J.W. Lucasweg 35	2031 BE	Haarlem	2500 - 10.000	1000+	1 - 10



Website www.keppeldatacentres.com
Phone +65(0)6535 5665
Email keppeldatacentres.com/contact-us/

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Almere Data Centre 2	Rondebeltweg 62	1328 BG	Almere	1000 - 2500	500 - 1000	1 - 10



Website www.lumen.com
Phone 020 808 3900
Email lumen.com/contact

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Lumen Amsterdam	Stekkenbergweg 4	1105 AJ	Amsterdam	2500 - 10.000	500 - 1000	1- 10



Website www.maincubes.com
Phone +31 20 7880 380
Email info-nl@maincubes.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
AMS01	Capronilaan 2	1119NR	Amsterdam	2500 - 10.000	1000+	1 - 10



Website <https://azure.microsoft.com/nl-nl/global-infrastructure/>

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Middenmeer			Middenmeer			20+

DUTCH DATA CENTERS



Website www.nikhefhousing.nl
Phone +31 20 592 5111
Email support@nikhefhousing.nl

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Nikhef Housing	Science Park 105	1098 XG	Amsterdam	0 - 1000	200 - 500	1 - 10



Website www.northcdatacenters.com
Phone +31 (0)88 623 3000
Email info@northcdatacenters.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Aalsmeer	Lakenblekerstraat 13	1431 GE	Aalsmeer	2500 - 10.000	1000+	10 - 20
Almere	Rondebeltweg 62	1329 BG	Almere	2500 - 10.000	1000+	10 - 20
Amsterdam	Kabelweg 48a	1014 BB	Amsterdam	2500 - 10.000	500 - 1000	1 - 10
Delft	Heertjeslaan 1	2629 JG	Delft	2500 - 10.000	200 - 500	1 - 10
Eindhoven 1	High Tech Campus 53	5656 AG	Eindhoven	1000 - 2500	1000 - 2500	1 - 10
Eindhoven 2						
Under development						
Groningen 1	Liverpoolweg 10	9744 TW	Groningen	1000 - 2500	500 - 1000	1 - 10
Groningen 2	Liverpoolweg 10	9744 TW	Groningen	1000 - 2500	-	1 - 10
Nieuwegein	Frieslandhaven 6	3433 PC	Nieuwegein	2500 - 10.000	-	1 - 10
Oude Meer	Fokkerweg 300	1438 AN	Oude-Meer	2500 - 10.000	1000+	1 - 10
Rotterdam Waalhaven	Anthony Fokkerweg 40	3088 GG	Rotterdam	0 - 1000	200 - 500	1 - 10
Rotterdam Zestienhoven 1	Tempelhof 5-11	3045 PV	Rotterdam	1000 - 2500	-	1 - 10
Rotterdam Zestienhoven 2	Tempelhof 5-11	3045 PV	Rotterdam	2500 0 10.000		1 - 10



Website hello.global.ntt/
Phone +31 (0)85 076-4500
Email sales@e-shelter.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
NTT Global Data Centers AMS1 B.V.	Aviolanda 1	1437 ED	Rozenburg	10.000+	1000+	20+

DUTCH DATA CENTERS



Website www.previder.nl
Phone +31(0)883323333
Email info@previder.nl

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Previder PDC1	Expolaan 50	7556 BE	Hengelo	2500 - 5000	1000+	10 - 20
Previder PDC2	Barnsteenstraat 15	7554 TC	Hengelo	1000 - 2500	500 - 1000	1 - 10
Previder PDC3	Otto Hahnweg 52	3542 AX	Utrecht	0 - 1000	0 - 200	0 - 1



Website www.penta-infra.com/
Phone +31 20 89 43 707
Email info@penta-infra.com

Locatie	Adres	Postcode	Stad	Space (M²)	Racks	Power (MW)
Datacenter Fryslân DCF1	François Haverschmidtwei 3	8914 BC	Leeuwarden	0 - 1000	0 - 200	0 - 1
Datacenter Fryslân DCF2	Archimedesweg 3	8912 AK	Leeuwarden	0 - 1000	0 - 200	0 - 1
Datacenter Geleen GLN01	Transportlaan 100	6163 CX	Geleen	0 - 1000	0 - 200	0 - 1



Website www.qtsdatacenters.com
Phone +31(0)880116900
Email support@qtsdatacenters.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Datacenter Groningen	Zernikelaan 16	9747 AA	Groningen	10.000+	1000+	10 - 20
QTS Datacenter Eemshaven	Huibertgatweg 2	9979 XZ	Eemshaven	10.000+	1000+	20+



Website www.smartdc.net
Phone +31(0)108900040
Email sales@smartdc.net

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Rotterdam 1	Van Nelleweg 1	3044 BC	Rotterdam	2500 - 10.000	500 - 1000	10 - 20
Heerlen	Kloosterweg 1	6412 CN	Heerlen	1000 - 2500	0 - 200	1 - 10



Website www.serverfarmllc.com
Phone +44 (0)20 33144768
Email sales@sfrdc.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Serverfarm AMS1	Archangelkade 1	1013 BE	Amsterdam	10.000+	1000	20+

DUTCH DATA CENTERS



Website www.serverius.net
Phone +31(0)887378374
Email sales@serverius.net

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Serverius SDC1	De Linge 26	8253 PJ	Dronten	2500 - 10,000	500 - 1000	1 - 10
Serverius SDC2	Ketelskamp 10	7942 KG	Meppel	2500	0 - 500	1 - 10
Serverius SDC3	Laan van de Ram 39	7324 BW	Apeldoorn	0 - 2500	0 - 300	1 - 10



Website www.silverfalcondc.com
Phone +31 20 808 7430
Email info@silverfalcondc.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
AMS 01 (Westpoort)	Plimsollweg 3	1042 AS	Amsterdam	10.000+	1000+	20+



Website www.switchdatacenters.com
Phone +31(0)206916424
Email sales@switchdatacenters.com

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
AMS2	Polanerbaan 1	3447 GN	Woerden	2500 - 10.000	500 - 1000	1 - 10
AMS3 Private Datacenter	Amsterdam ZO	-	Amsterdam	2500 - 10.000	-	10 - 20
AMS4 Science Park South	Treubweg 9-11	1112 BA	Diemen	2500 - 10.000	-	10 - 30
AMS5 Amsterdam						
Under development						



Website www.systemec.nl
Phone +31(0)773828580
Email info@systemec.nl

Location	Address	Zip code	City	Space (M²)	Racks	Power (MW)
Systemec Data Centers DC 19	Marinus Dammeweg 19	5928 PW	Venlo	0 - 1000	0 - 200	1 - 10
Systemec Data Centers DC 25	Marinus Dammeweg 25	5928 PW	Venlo	0 - 1000	0 - 200	1 - 10



Website www.yondrgroup.com
Email info@yondrgroup.com

DUTCH DATA CENTERS



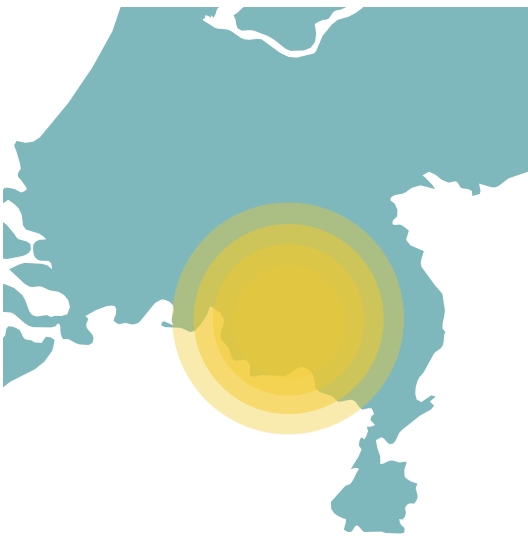
MRA - Amsterdam-Region

- Atlas Edge
Cellnex
Colt
CyrusOne
CloudHQ
Digital Realty
EdgeConnex
Equinix
Eurofiber Cloud Infra
EXA Infrastructure
Global Switch
Google
SilverFalcon
- Iron Mountain Data Centers
Keppel
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NorthC
NTT
Serverius
Serverfarm
Switch Datacenters
Yondr



Rotterdam/The Hague

- Bytesnet
Cellnex
Colt
DFDC
Delta Fiber
Eurofiber Cloud Infra
NorthC Data Centers
Smartdc



Eindhoven

- Cellnex
Eurofiber Cloud Infra
EQUANS
Global-e Data Centers
Interconnect Services B.V.
NorthC Data Centers

DUTCH DATA CENTERS



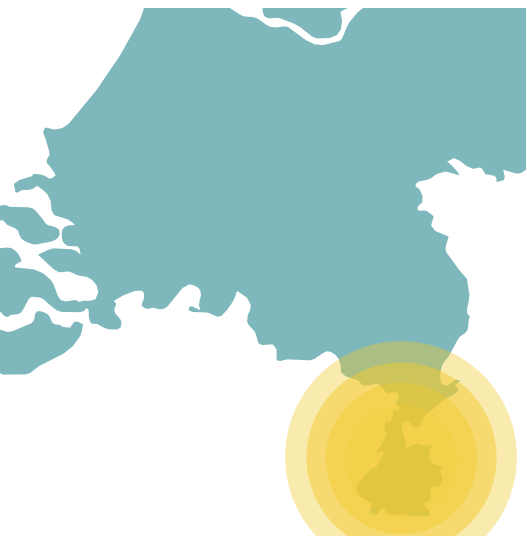
North-Region

- Bytesnet
Cellnex
Datacenter Groningen
Pentra Infra
NorthC Data Centers
QTS
Serverius



Central Netherlands

- Cellnex
Equinix
Eurofiber Cloud Infra
NorthC Data Centers
Previder
Serverius



Limburg

- Cellnex
Cegeka
EQUANS
Smartdc
Systemec
Penta Infra



ABOUT DUTCH DATA CENTER ASSOCIATION

The Dutch Data Center Association (DDA) is the trade association of data centers in the Netherlands, the bedrock of the Dutch economy. The DDA unites leading data centers in the Netherlands in a common mission: the strengthening of economic growth and the profiling of the data center sector to government, media and society.

The DDA expresses industry views on regulatory and policy issues. It demonstrates leadership by facilitating and encouraging members to implement operational improvements in the form of best practices. The DDA promotes education and contributes to technical standards, which enables the data center industry in the Netherlands and abroad to further distinguish itself.

The DDA closely collaborates with Digital Gateway to Europe, which promotes the Netherlands as international data hub. The DDA also collaborates with market operators, the government and other interested parties. Furthermore, the DDA actively collaborates with European trade associations to strengthen the digital infrastructure industry as a whole and is a member of VNO NCW, the largest employers organization in The Netherlands.

Contact us

Dutch Data Center Association
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 twitter.com/DutchDatacenter

 www.linkedin.com/company/dutch-datacenter-association



TEAM

TEAM

Board

Michiel Eielts
Chairman
Equinix



Eric Boonstra
Secretary
Iron Mountain



Richard Boogaard
Treasurer
Smartdc



Rob Stevens
Board member
Interconnect



Dick Theunissen
Board member
EdgeConnex



Alexandra Schless
Board member
NorthC



Executive Team

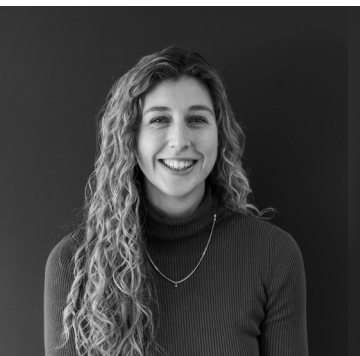
Stijn Grove
Managing Director



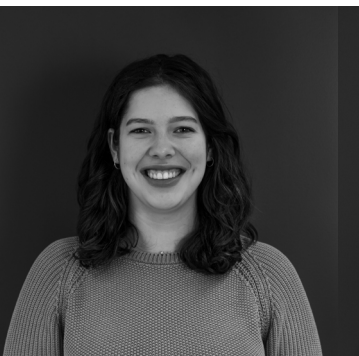
Andrew van der Haar
Senior Advisor
Energy & Sustainability
Employment & Education



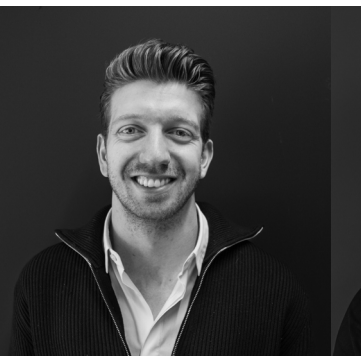
Zoë Derksen
Manager
Marketing, PR & Events



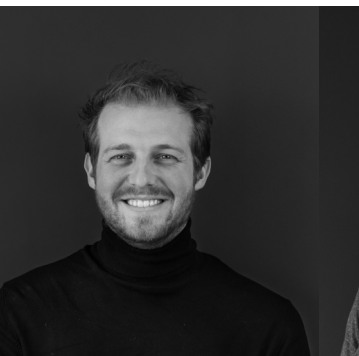
Laura Beukers
Policy Officer Digital
Economy



Pim Kokke
Marketer & Policy Officer
Employment & Education



Max Roest
Marketer & Project Leader
Datacenterplatform



Kees Verhoeven
Advisor Digital
Transformation



Bianca Janssens
Office Manager



PARTNERS













































MAIN PARTNERS

EVERSHEDS SUTHERLAND

www.eversheds-sutherland.com



www.stulz-benelux.com/nl



www.legrand.nl



www.wattswater.eu/data-center-solutions



<https://www.stroomkr8.nl/>

Eversheds Sutherland (Netherlands) BV is a firm of legal advisors with offices in Amsterdam and Rotterdam. It is part of Eversheds Sutherland, an organization with 66 offices spread over 32 countries and more than 2.000 expert legal professionals.

Customer focus, entrepreneurial spirit, and technological expertise – these have formed the basis for the successful growth of the STULZ Group for almost 70 years. Innovations from STULZ help to reduce the power consumption of data centers and other mission-critical applications.

Reliable, efficient and scalable data center infrastructures is what we create. With award-winning solutions from Legrand, Minkels, Raritan, Server Technology, and Starline you benefit from optimal uptime of mission-critical operations.

From high-performing hydronic heating or cooling components, to reliable flow control products and drains, WATTS provides mission-critical performance to keep your Data Center running efficiently.

Stroomkr8 answers your energy questions. They do this from an inspiring and tangible starting point: "making people happy with our high-quality services! With their broad knowledge of the energy market you can contact us for everything in the field of energy. From strategic advice to operational support." They know exactly where you can achieve energy cost savings for your business. Stroomkr8 assures you of affordable and sustainable energy

DDA EVENTS & PUBLICATIONS



Kickstart Europe Conference

KickStart Europe returns to Amsterdam on February 26 (Welcome Evening) & February 27 (Conference Day), 2024!

By the industry, for the industry: the annual strategy and networking conference takes place right at the start of the year. It provides visitors the latest tech trends and offers connections to the right investments in the European digital infrastructure - data center, cloud, connectivity, edge. One of Europe's largest conferences with 1.500 attendees. For more: www.kickstartconf.eu



Green Data Center Conference

The Green Data Center Conference is the annual gathering of data centers and its stakeholders regarding sustainability and efficiency within the data center industry.

For years, the Green Data Center Conference and the Fiber Vakdag have been the leading events within the digital sector. This is why the data center and fiber industry are joining forces for a joint conference on Wednesday, October 11 at the Jaarbeurs in Utrecht.

For more information visit: www.greendatacenters.nl

Download more publication by the DDA

The DDA regularly publishes freely available industry reports. Topics include sustainability, employment, the digital hub and its ecosystem, the importance of migrating to a data center, important legal updates, and much more. All publications are freely available for download via www.dutchdatacenters.nl/publicaties.

