BCS
The global data centre consultancy

Q3

Data Centre Commercial Report

Quarterly insights on data centre costs, markets, and forecasts.

September 2026

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Written by



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Real data. Real experience.

Our data comes from the ground up, drawn from 300+ projects, £20bn worth of global advisory work and 5GW+ of delivered IT load. It's not theory or estimates, it's data built on real delivery, so you can trust the numbers behind our insights.

Talk to us about Data Centre commercial needs **www.bcsconsultancy.com**

What we cover

As the data centre market evolves, growing AI demand, higher power densities, constrained infrastructure and continued supply-chain pressure are reshaping cost and delivery. In this fourth edition of our Data Centre Commercial Report, we examine cost movements, emerging pressures and the market conditions influencing procurement and delivery. Our Q3 analysis draws on real project data, quarterly benchmarking and intelligence from across our global network.

Our aim remains unchanged: to provide clients with a clear view of where costs are today, what is driving them and what that means for commercial decision making.



3 things to know this quarter

Regional commercial insights

Multiple markets, one shared story. From the UK's 125GW connection queue to Cape Town's 580MW ask, power availability is now the deciding factor in almost every market we cover this quarter.

Q3 key cost metric movements

Electrical costs are up ~6.5% since Q1 2025 to €2,157/kW, and OFCI has hit its highest point in our reporting period. We hold our 5–8% annualised growth forecast to the end of 2029.

Sector outlook

800V DC vs traditional AC distribution, the rise of Neoclouds, and why existing, power-connected sites are becoming the fastest route to AI capacity.

Data centre snapshot



The data centre market continues to see strong structural growth, with AI, cloud adoption and rising digital demand across established and emerging markets. Increasingly, the market is defined by where capacity can actually be delivered, not simply where demand exists.

Power remains the key differentiator. Grid constraints, connection delays and limited available capacity are shaping site selection, programme and project viability, pushing developers beyond traditional Tier 1 locations towards regional and emerging markets where power, land and infrastructure can be secured.

AI is also reshaping the technical requirements of facilities. Higher rack densities mean greater power and cooling demand, and additional pressure on structural design and MEP infrastructure.

From a commercial perspective, cost pressure remains. BCS continues to forecast 5–8% annualised construction cost growth to the end of 2029, with labour shortages, long-lead equipment and material availability continuing to drive programme and procurement risks.

Our market intelligence goes beyond historic project data. BCS engages directly with contractors, suppliers, market specialists and industry leaders, continually testing and benchmarking our data against current conditions, so our view stays current, practical and grounded in what is happening across the supply chain today.

What is happening in different regions

BCS Regional Heads Updates

UK

The UK data centre market remains strong, driven by AI adoption, higher rack densities and growing demand for computing capacity. Government policy continues to support AI and data centre infrastructure through proposed AI Growth Zones, subject to requirements on power, water, supply chains and communities. Power availability remains the key constraint. The National Energy System Operator (NESO) expects around 5.2GW of connections by 2030 against 70GW+ of requests, while Ofgem reports speculative applications rising from 41GW to 125GW in under a year. Ofgem is also proposing a Data Centre Commitment Fee and strengthened queue-management milestones, requiring developers to demonstrate genuine project and financial commitment to retain their connection position. Developer-led HV infrastructure, on-site generation and microgrids could increasingly provide alternatives to standard grid connections, potentially favouring better-capitalised developers. Cost volatility, logistics and specialist skills shortages add further pressure, reinforcing the case for early procurement and supply-chain engagement.



Karl Hofbauer
Associate Director, UK



Elton Olivier
Associate Director, Germany

Germany

Germany remains one of Europe's most active markets, with Frankfurt strengthening its position as the leading hub and Berlin absorbing overflow demand. Grid capacity is the primary delivery bottleneck: utilities cannot guarantee connection dates on several major schemes, and long-lead equipment now carries multi-year lead times, pushing early procurement further upstream just as investment turns more cautious. Skilled-trades labour remains tight, constraining contractor capacity in an already heated market. On regulation, the recent EnEfG amendment will ease pressure on operators, reducing PUE targets and deferring renewable electricity mandates to 2030. The economic backdrop has stabilised, with IFO revising 2026 GDP growth up to 1.4%, though unemployment remains above three million. Early grid procurement and utility-ready site selection outside constrained primary markets remain the key lever for protecting delivery timelines.

Austria

Austria's market remains active, with Vienna and Upper Austria firmly establishing themselves as regional cloud and AI hubs. Growth faces real hurdles due to tight power availability and limited utility ready sites around Vienna, prompting Lower Austria to introduce a dedicated Data Centre Special Zone under new zoning laws. Operators are navigating complex supply chain bottlenecks, with long-lead items like medium voltage transformers and heavy chillers facing extended delivery delays, while skilled construction and engineering labour remains fiercely competitive. The new Electricity Market Act brings welcome market flexibility, and major investments such as Google's project in Kronstorf show strong activity paired with innovative waste heat district integration. Key risks are strict noise regulations and congested grid queues, but Austria's green hydropower mix gives it a genuine edge for sustainable infrastructure growth.



Marcel Reifschneider-Hicker
Associate Director, Austria

South Africa

South Africa remains Africa's leading data centre market, attracting strong hyperscale, colocation and cloud investment, supported by continued growth in AI, digitalisation and data sovereignty. Q3 has brought increased public and regulatory scrutiny, with the South African Human Rights Commission reviewing the sector's impact on electricity, water, land use, sustainability and communities. Cape Town is a particular focus, where proposed developments reportedly require around 580MW, approximately 34% of the city's current electricity supply. Power availability is improving, but grid access, municipal supply, infrastructure capacity and resource constraints remain key risks. Future projects will increasingly need credible power and water strategies, alongside clear local and community benefits.



Oskar Lampe
Regional Director, South Africa



Alex Mariage
Head of New Regions

Poland

Poland is an emerging market that has yet to see a global scale investment announcement, though it is only a matter of time. Poland's economic growth has been strong, and the country is changing fast as a society, building an economic powerhouse in Eastern Europe. Sustaining growth requires digital infrastructure to match, and local companies are shifting into data centre development. Early investors stand to benefit most. The current challenge is convincing global operators to make the move, and avoid the mistakes neighbouring European markets made before them. A shift towards greener energy, backed by a national energy strategy, will make Poland a more attractive destination.

Italy

Italy's market remains highly active, with Milan continuing to lead hyperscale demand. Power availability and grid connection timelines remain the main constraint: Terna connection requests have reached approximately 95GW, far outpacing realistically deliverable capacity. During Q3, the new Single Authorisation framework moved into implementation, with MASE issuing operational guidance for data centre projects in July. Labour availability remains tight, particularly for experienced project, construction and specialist MEP resources, while long-lead electrical equipment continues to demand early procurement and careful programme management. The market is increasingly shifting towards projects with secured power, funding and advanced permitting rather than speculative developments. Key opportunities remain in Milan and Northern Italy, with brownfield and alternative locations gaining interest. The main risks remain grid capacity, connection dates, permitting and supply chain constraints.



Martin Horacek
Service Director, Italy

*Other regions to follow in next reports

Spain

Spain's market continues to see strong hyperscale and AI-driven demand, with Madrid the leading market and Aragón/Zaragoza developing as an important alternative. Power availability and grid access remain key constraints, while labour and specialist MEP resources are under pressure across major developments. The key Q3 development is the Government's urgent consultation on a proposed Royal Decree introducing stricter requirements for data centre sustainability, energy efficiency and digital sovereignty. If approved in its current form, it would require data centres above 1 MW to cover at least 80% of their electricity consumption on an hourly basis with new renewable generation, alongside a 1:1 additionality requirement, plus tighter energy and water efficiency rules and EU-based operational and data sovereignty requirements. If implemented, this could raise development and compliance costs, further favouring projects with secured renewable power, advanced permitting and strong technical maturity. Key opportunities remain in Madrid and Aragón; grid availability, regulatory changes, programme constraints and supply-chain capacity are the main risks.



Luca D'Alleva
Regional Director,
Southern Europe

Portugal



Martin Horacek
Service Director, Italy

Portugal continues to strengthen its position as an emerging hyperscale and AI data centre market, supported by renewable energy availability, subsea connectivity and significant development potential, particularly around Sines. Power availability compares favourably with more constrained Southern European markets, although grid connection and infrastructure delivery remain important considerations. The Government's National Data Centre Plan, approved in Q2, now provides a clearer strategic framework for 2026–27, focused on reducing time-to-power and time-to-market and improving coordination of permitting and grid infrastructure. Labour and specialist MEP capacity remain less developed than in established markets, creating potential delivery constraints as projects scale up, while long-lead electrical and cooling equipment remains a procurement risk. Sines is the key opportunity, with main risks around local supply chain depth, permitting and infrastructure delivery.

FLAP-D

Frankfurt, **L**ondon, **A**msterdam, **P**aris & **D**ublin

The FLAP-D markets remain Europe's core data centre hubs, supported by strong cloud, AI and digital infrastructure demand, though growth is increasingly constrained by power availability, planning and limited land.

Frankfurt & Amsterdam
face ongoing grid and permitting challenges

Paris
benefits from strong demand and infrastructure investment

Dublin
continues to manage electricity demand and connection capacity

London
remains Europe's largest market but is increasingly looking towards regional locations

Construction costs remain elevated, with volatility in steel, copper and other materials adding pressure to project budgets. Labour shortages, particularly across specialist data centre trades, are also contributing to cost and programme risk.

Developers are therefore prioritising sites with secured power, planning certainty and established supply chains, while regional European markets continue to gain interest as alternatives to traditional FLAP-D locations.

*Other regions to follow in next reports

UK: Policy, Power & Growth Zones

Joe Potten
Manager, UK



In August 2026, the Green Party called for a freeze on large data centre developments in the UK, citing electricity demand, water consumption, and drought conditions. The Government has rejected this, arguing a freeze would push investment and jobs overseas and increase reliance on foreign computing capacity for sensitive UK data. That same month, the Government published a revised National Planning Policy Framework outlining candidate locations as AI 'Growth Zones' and data centre infrastructure.

The policy direction clearly favours additional AI and data centre capacity, but this is not a guarantee of approval. All projects must still address clean power, responsible water use, British supply chains and impact on host communities.

Grid Connection requests increase from 41GW to 125GW in less than 12 months.

Despite growing optimism, grid capacity constraints remain a bigger barrier than the political debate. The National Energy System Operator (NESO) expects only ~ 5.2GW to be connected by 2030 against 70GW+ of connection requests.

The Framework acknowledges this bottleneck, proposing that AI Growth Zone developers build their own high-voltage grid infrastructure. On-site generation and 'self-supply' Microgrids, alongside direct HV infrastructure builds, remain the long-term ambition, mirroring approaches seen elsewhere in Europe.

Under this two-tier delivery landscape, operators who can afford to self-build power infrastructure will likely move faster, while less capitalised developers remain stuck in the standard connection queue.

£100bn

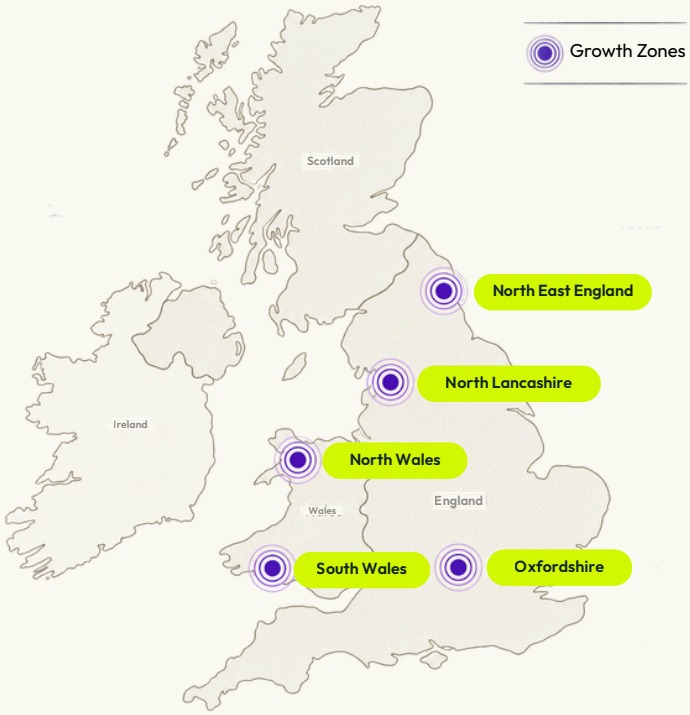
This UK Planning policy has shifted to a pro-Data Centre development view, potentially unlocking up to £100bn of additional investment into the AI Growth Zone programme.

Constraints

Growth is constrained by limited power and grid capacity, high cooling and water costs, supply-chain and skills shortages, fragmented regulations, and limited multi-site resilience, increasing outage risk.

Where are the UK Growth Zones?

The Government requires locations for at least 500MW of power capacity by 2030. The key locations include the following:

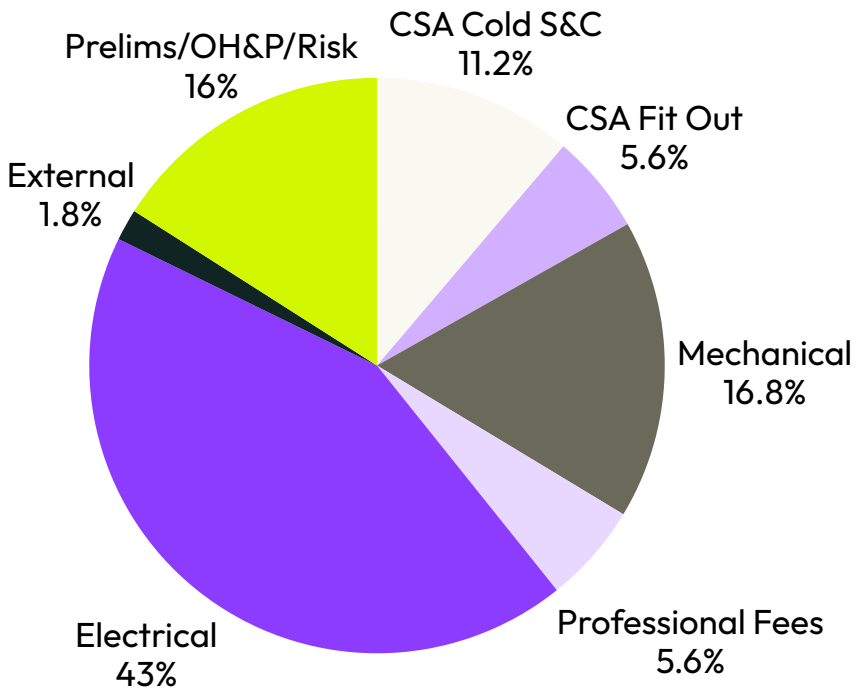


Data centre benchmarking update Q3-2026

In an era of global volatility and increasing demand for critical infrastructure, the data centre sector continues to evolve at pace, with shifting costs, changing market dynamics, and new regional trends shaping the landscape. Up-to-date costs matter for budgeting.

The benchmarking snapshot below highlights key performance metrics and movements drawn from our latest analysis, offering a clear view of current trends and what the data means in practice.

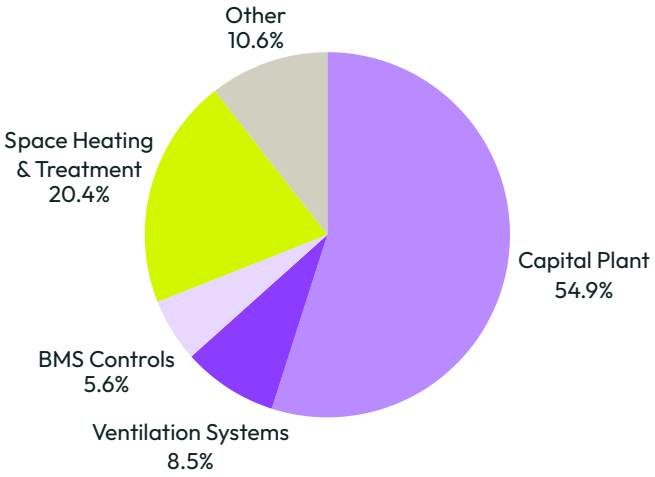
Average project cost summary



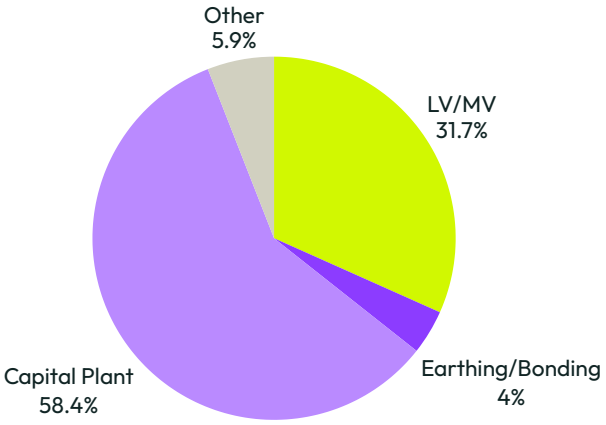
*The above is based on predominantly enhanced single stage D&B procurement routes.

Other key splits

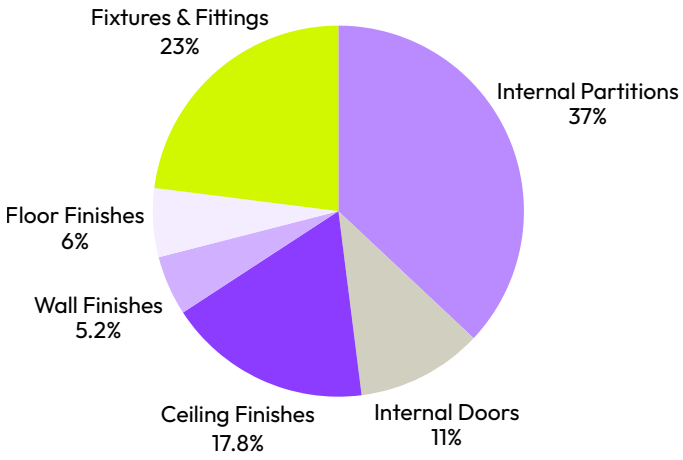
Average mechanical splits



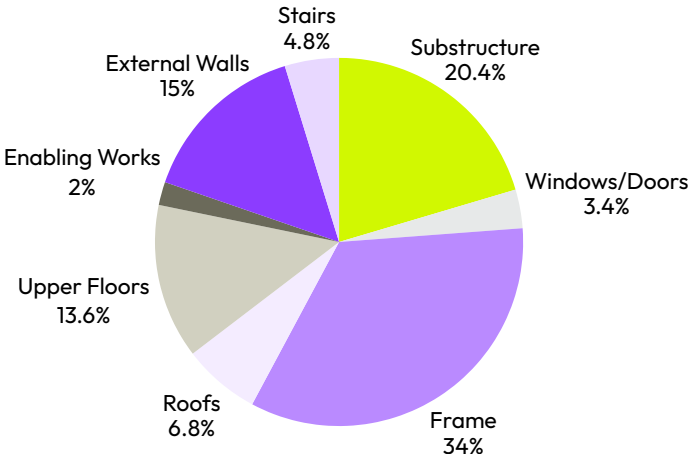
Average electrical splits



Average CSA fit-out splits



Average shell & core splits



*The above is based on predominantly enhanced single stage D&B procurement routes.

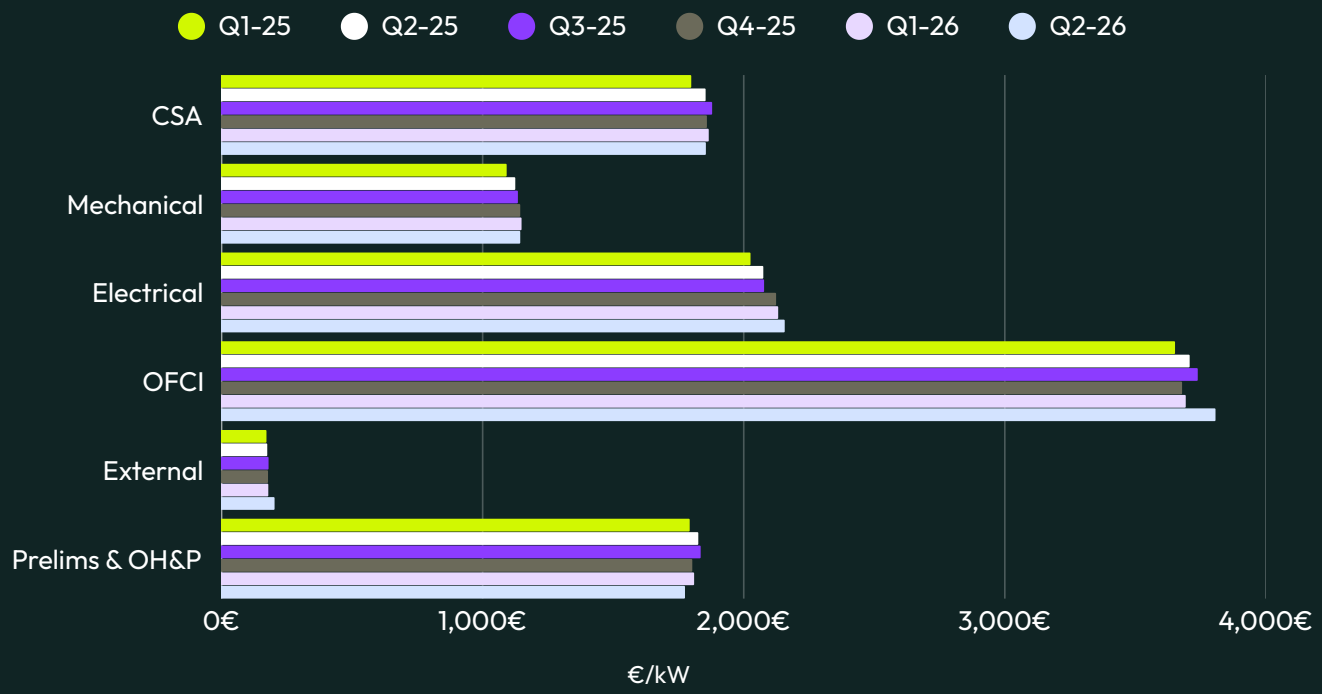
Q3-2026 Cost variance reflection

This section tracks cost movements across our global quarterly benchmarking, comparing Q2 2026 with previous reporting periods to highlight the pressures shaping current market conditions. As our benchmarking is reported one quarter in arrears, the Q3 report reflects Q2 2026 data.

The temporary stabilisation seen in late 2025 has now largely unwound. Q2 2026 data shows renewed upward pressure across several key cost categories. Electrical costs saw the sharpest escalation, rising from €2,026/kW in Q1 2025 to €2,157/kW in Q2 2026 (around 6.5%), while overall OFCI costs have also reached €3,807/kW, their highest point within the reporting period. External works recorded the largest percentage increase, rising by approximately 18% since Q1 2025, albeit from a lower cost base. CSA and mechanical costs rose more moderately, while preliminaries, overheads and profit stayed comparatively stable.

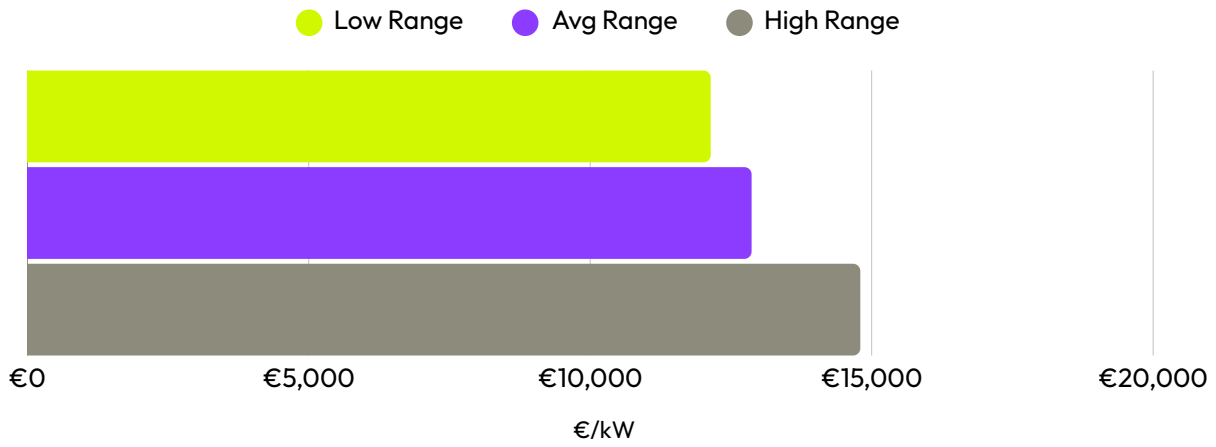
The underlying market fundamentals remain inflationary. Strong AI-driven demand, increasing rack densities, constrained specialist labour, grid connection challenges and continued pressure on long-lead electrical equipment are maintaining upward cost pressure. Copper and aluminium price volatility is adding further pressure across cabling, busbars and MEP infrastructure. With the capacity constraints and infrastructure challenges persisting, our 5–8% annualised construction cost growth forecast through 2029 remains relevant. Individual tenders may still show competitive pricing, but the broader evidence suggests that late-2025 stabilisation was a temporary adjustment, not a sustained reversal in cost inflation.

Package % changes between Q1 2025 to Q2 2026



Q3-26 benchmarking summary

BCS average global data centre costing (excl abnormals)



Basis of BCS Benchmarking:
CSA, Fitout, Mechanical, Mechanical and Electrical OFCI Plant, External works, GC Prelims, GC OH&P, GC D&B fees, Professional fees, Contingency.

Excludes:
Legal team fees, admin build or specific tenant fit-out, site abnormals, remediation services, archaeology, etc. site acquisitions, Specific renewable energy targets, off-site infrastructure, and utility upgrades.

Note:
All exclusions outside traditional benchmark parameters can be priced within our cost plans to suit customer requirements.



Andrew Hellyer
Service Director, UK

5-8%

Annual growth outlook
2026 to 2029

2027	2028	2029
+6-8%	+5-7%	+5-7%

Despite moderating inflation, data centre construction costs are expected to rise steadily through 2029 due to combined cost pressures resulting from:

- AI-led demand
- Power and cooling requirements
- Skilled labour shortages
- Rising material costs
- Ongoing capacity constraints and stricter energy standards

Q3-3 Debates shaping delivery

1. 800V DC vs Traditional AC Distribution: The Next Step in Data Centre Power?

With increasing demands of AI infrastructure and the associated additional power consumptions within data centres, there is a strong need for more energy efficient systems. This quarter we look at one of the market's live debates: 800V DC vs the more traditional 400V AC switchgear approach.

Typically, in a standard data centre, the UPS system is inefficient in its nature, with significant energy waste, as it forces AC to DC to AC in its conversion cycle. Using 800V systems completely eliminates this inefficiency, with DC passing straight through without the need for any interaction with AC. Removing this bulky process can significantly reduce both energy losses along with unwanted additional heat generation. Below are the key perceived benefits and concerns from our investigations.

Advantages	Disadvantages
LV Distribution Savings - Typically this is between 10-12% of construction cost. Having 800V switchgear means almost double the current capacity of the distribution runs, bringing significant reductions to cable/busbar sizes.	Initial Capex uplift on switchgear cost +20 to +30%
Building Footprint reductions :- electrical plant rooms can reduce in size by approx. 10-15% making the building more compact and therefore cheaper to build.	Potential impacts on other equipment – UPS systems may also be impacted, whilst others, while other plant, such as chillers, may remain AC supplied.
Reduced total cost of ownership (TCO) efficient from an Opex perspective.	Skill shortages - Relevant DC trained personnel.

In theory, the potential TCO savings could outweigh the initial Capex outlay associated with the switchgear. Reduced energy consumption could also provide additional sustainability benefits for the project. However, there are several important considerations:



Andrew Hellyer
Service Director, UK

1 Client Capex
Despite the potential for longer-term TCO savings, clients often remain focused on minimising initial Capex and may be reluctant to accept a higher upfront cost.

2 Conceptual stage
The proposed solution remains conceptual, with no current marketable product available.

3 Lead times
As there is currently no marketable product, it is not yet possible to reliably assess any potential impact on lead times, whether positive or negative.

4 Maturity of the data
The available data is not yet sufficiently mature to determine with confidence whether the anticipated benefits can be realised in practice.

Overall, while the concept has the potential to deliver TCO and sustainability benefits, further development, validation and market availability would be required before these benefits could be quantified with confidence.

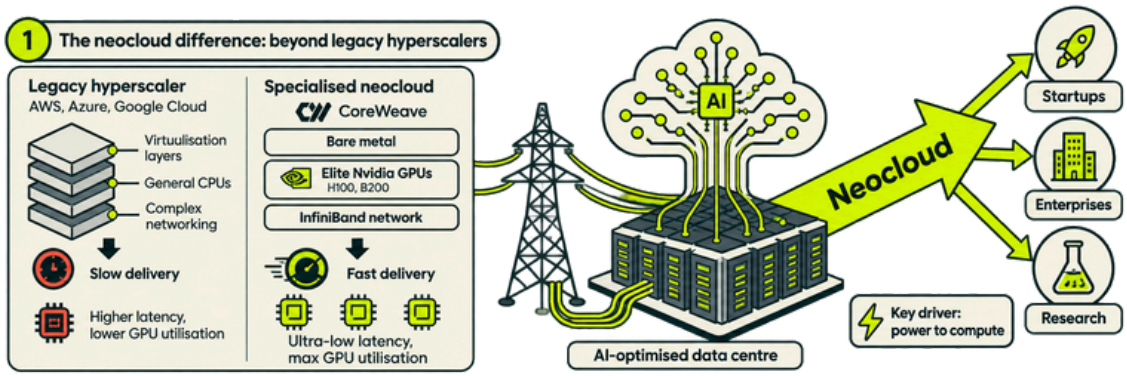
2. **Neoclouds: Just Another Buzzword or Something More?**

At first glance, Neocloud might sound like just another tech buzzword. But it reflects a real shift in how organisations build infrastructure for AI and high-performance computing (HPC).

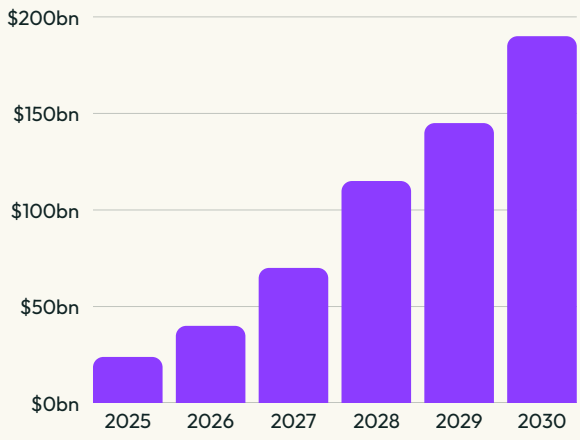
Traditional cloud providers such as AWS, Microsoft, Google, Meta and Oracle were built to support a wide range of business applications. AI's rapid growth has created new demands; training large AI models requires thousands of GPUs working together efficiently, while AI inference needs predictable, cost-effective performance. General-purpose cloud platforms were not built with these workloads as their primary focus.

Neoclouds exist to fill this gap. They specialise in delivering high-performance GPU infrastructure, with faster provisioning, transparent pricing and environments optimised for AI and HPC workloads, concentrating on one problem: reliable, scalable access to the processing power AI demands.

Neocloud: The AI compute revolution



Estimated Neocloud Revenue Forecast



Estimated annual revenue based on Synergy Research Group forecasts

Growth has been driven by demand outpacing supply, with specialist providers emerging to secure and deliver scarce GPU capacity more efficiently than traditional cloud platforms.

As AI adoption accelerates, Neoclouds are addressing a genuine gap in the market, driving:

- Greater demand for high-density, AI-ready capacity
- Increased focus on power availability and cooling
- Greater potential for brownfield/existing-site strategies
- New customer profiles and procurement models
- Growing demand for rapid deployment

Karl Hofbauer
Associate Director, UK



3. **Critical Infrastructure: The Fastest Route to AI Capacity**

As the challenges in the build-out of new facilities become ever more apparent, the case for repurposing existing sites for AI is growing. Repurposing existing sites avoids the cost, delay, community and permitting pressure of new development, while making the most of existing power supplies that are often under-utilised. This is most compelling for inference workloads, where smaller facilities close to the user provide shorter round-trip times and a more direct link between investment and recurring revenue.

Industry forecasts put inference capacity growing at 35% CAGR from 2025 to 2030, reaching 93.3GW by 2030, and some measures suggest inference may already be the majority of AI compute, ahead of earlier expectations.

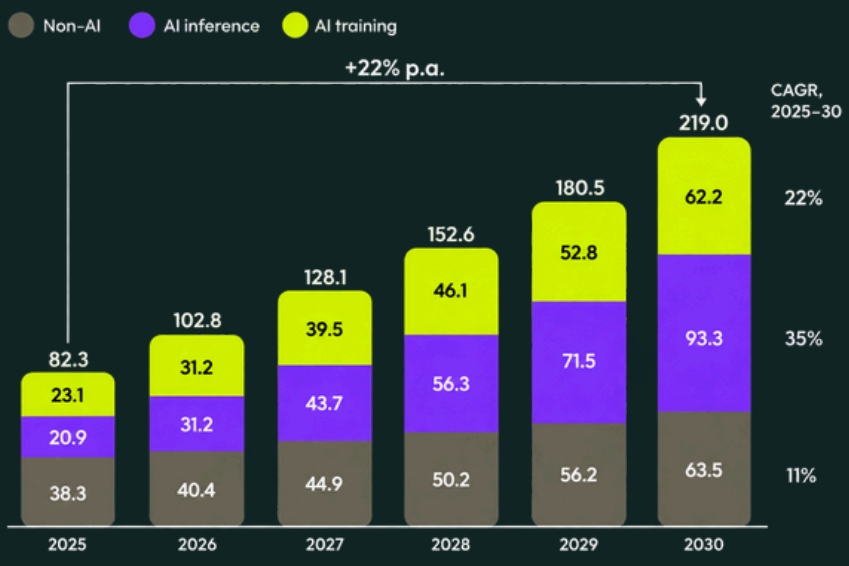
How we see the investment landscape for existing sites breaking down

Existing site	Likely strategy
Modern, well-powered site with spare capacity	Upgrade aggressively for AI inference
Older facility with valuable grid connection	Selective/brownfield retrofit
Old, power-constrained facility	Keep conventional workloads / eventually redevelop



Simon Harris
Head of Critical Infrastructure

Global data centre demand by workload, 2025-30, gigawatts



The first two categories carry particular value, since a data centre's existing power entitlement is increasingly an asset in its own right.

This stratification is pushing owners, operators and investors to trade off time spent on site evaluation against pressure to hit ready-for-service dates and start generating revenue.

What's the market telling us?

BCS runs dedicated workshops and market engagement events with main contractors and key suppliers, alongside online questionnaires and business benchmarking, to gather commercial intelligence, validate market trends and understand what is happening across the supply chain.

We ask the questions that matter:

- What trends are shaping the market today?
- What are the biggest frustrations across the supply chain?
- Where are the greatest commercial and delivery challenges emerging?
- What are contractors, suppliers and manufacturers seeing that may not yet be reflected in the published data?
- How are businesses responding to changing market conditions, costs and delivery pressures?

96%

Expect demand for skilled staff to rise

91%

Expect increases in supply chain delays

80%

Expect supply chain disruption to increase costs

"In the current market, some of the greatest risks can arise before construction even begins"

Karl Hofbauer
Associate Director, UK



BCS engages directly with contractors and key suppliers through workshops, market events and questionnaires. This enables us to gather benchmarking data, validate trends and capture current supply-chain intelligence.

This validates our data, surfaces emerging trends earlier, benchmarks market performance and helps us understand the commercial environment in which data centres are designed and built today, giving clients the intelligence they need for better commercial, procurement and delivery decisions in a fast-moving market.

The pressure points

FIbre optic cable

Fibre optic demand is rising fast as AI and hyperscale data centres need greater connectivity and higher server densities. Lead times for high-count fibre can exceed 30 weeks, and shortages of skilled installers and limited network capacity are increasing project risk and reinforcing the need for early procurement.

UK steel prices

MEPS International reports UK steel prices up 25% since January this year, against 10–15% across the EU. Section steel now costs €90 more per tonne than in mainland Europe, and reduced import quotas plus 50% tariffs on excess imports are set to widen the gap further.

AI is pushing up complexity and cost

AI is not simply creating more data centres, it is changing what we need to build. Higher rack densities are driving greater power, cooling, structural and equipment requirements, while liquid cooling and specialist infrastructure add further cost and procurement complexity.

EHV Transformers

Lead times for 380kV extra high voltage transformers remain a major challenge. European suppliers quote 24–36 months, Asian manufacturers 10–20 months, but concerns over quality, client acceptance and procurement risk mean shorter lead times do not always mean faster delivery.

What will slow down construction?

Q3-2026 lead times with supply chain constraint

Item	Approximate Lead Time	Notes / Risk Impact
Transformers (MV)	20–40 weeks	Custom-built; long manufacturing and shipping times; critical for power distribution.
Transformers (HV)	44–156 weeks	Custom-built; long manufacturing and shipping times; critical for power distribution; significant lead-time variance between European and Asian suppliers.
Uninterruptible Power Supply (UPS) Systems	18–28 weeks	Large modular UPS units require precise design and factory testing.
Generators (Diesel/Gas)	40–50 weeks	Size, containerisation, and emission compliance can extend production; late delivery delays site energisation.
Chillers & Cooling Equipment	20–40 weeks	Large-capacity chillers or cooling towers often require custom engineering and factory acceptance tests.
Switchgear & Electrical Panels	16–30 weeks	Complex assembly and testing; delays directly impact commissioning schedules.
Steel Frame	12-28 weeks	Design, fabrication, inspection and delivery (UK tariffs on imported steel came into effect on 1 July, so we are monitoring the potential impact.
Raised Flooring & Specialised Structural Components	10–18 weeks	Heavy or precision-engineered elements; delays can stall interior fit-out.

These lead times vary by specification, location and project, and should be used only as a high-level guide. We recommend consulting suppliers directly for precise timelines. Estimates assume pre-order planning and no extraordinary disruption; combined, these long lead items can create critical path delays if not procured early.

Long lead items are driving programme risk; the earlier we can engage, the more value we can add.

Conclusion



Growth predictions

Data centre construction is set to stay on a strong growth trajectory, driven by AI, cloud adoption and increasing digital infrastructure requirements.

Demand for high-density facilities is likely to continue outpacing available power, land, skilled labour and specialist supply-chain capacity, sustaining pressure on cost and programme.

We forecast annualised construction cost growth of approximately 5–8% to the end of 2029, though regional variations will remain significant.

Markets with constrained grid capacity, limited labour and long equipment lead times will see the greatest inflationary pressure.

Early procurement, robust benchmarking and active supply chain engagement will therefore remain critical to managing risk and maintaining programme certainty.

The bottom line

The data centre market remains resilient, but continued demand is placing growing pressure on cost, capacity and programme.

AI-driven requirements, constrained power availability, specialist skills shortages and ongoing supply chain pressures continue to shape both pricing and delivery.

At BCS, we stay actively engaged with the market, continually updating our benchmarks and testing our findings against real-world conditions.

We are not relying solely on our own data. We speak directly with market experts, supply chain leaders, contractors and major industry stakeholders to validate trends and provide a balanced view, keeping our benchmarking current, relevant and commercially robust.



The global
data centre
consultancy

We make it possible

We help you at every stage of the data centre lifecycle, bringing projects to life on time and on budget.

bcsconsultancy.com