

Amsterdam

As one of the so-called FLAP markets of Europe, Amsterdam is not only one of the continent's major connectivity markets but also a critical hub globally. Its strengths are many but not apparent across all of the MCS categories. Anchored by AMS-IX, one of the world's most significant data center-neutral IXs, Amsterdam ranks only behind Frankfurt globally as a center for network peering. The metro's international internet capacity, carrier presence, and direct international connections also reinforce its essential stature for network presence.

Amsterdam is subject to the recurring weakness affecting so many other key markets—access to power. Its challenges are more public than some, with ongoing clashes between government and the data center industry. The government mandated in January 2024 that no hyperscale data centers could be developed nationwide, except in a few parts of Het Hogeland (e.g. Eemshaven) and Hollands Kroon. At the same time, the Municipality of Amsterdam further restricted new data center development in the city to business parks in Amsterdam and Haarlemmermeer, as well as Hollands Kroon, while stipulating that new sites could not add to power grid constraints and had to meet strict environmental standards.

That said, the Netherlands' situation is more hopeful when it comes to sourcing green power than many others. Among the 50 top markets in the MCS, Amsterdam ranks among the top 10 for current access to clean energy, and it ranks highest in this grouping for planned clean power. According to the Global Energy Monitor, the Netherlands has 19 GW of wind energy under pre-construction.

FIGURE 1
Amsterdam Market Connectivity Score



4
Global Rank



	Overall Score	Data Centers	IXes	Pricing	Cloud	Transport	Local Access	Power	Demo-graphics	Regu-lations
Amsterdam	55	28	87	99	39	49	38	35	32	87
Frankfurt	62	61	94	99	63	65	36	23	31	83
London	60	55	51	99	51	61	68	26	52	81
Paris	50	27	39	99	50	37	53	31	37	76
Stockholm	43	11	50	99	34	25	38	22	21	88

Source: TeleGeography

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