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Poland Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 161 pages | Mordor Intelligence

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Report description:

Poland Data Center Market Analysis

The Poland data center market is expected to grow from USD 1.89 billion in 2025 to USD 2.17 billion in 2026 and is forecast to reach USD 4.29 billion by 2031 at 14.63% CAGR over 2026-2031. Strong hyperscale cloud investments, rapid enterprise digitalization, and a growing renewable-energy pipeline anchor the expansion of the Poland data center market. In parallel, the nation's installed IT load capacity is forecast to rise from 660 MW in 2025 to 930 MW in 2030, a 7.34% CAGR that signals a pivot toward AI-optimized, high-density deployments rather than pure footprint growth. The market segment shares and estimates are calculated and reported in terms of MW. Scale economics favour massive campuses that attract global operators, while government incentives and cross-border fiber links amplify Poland's positioning as Central and Eastern Europe's preferred interconnection hub. Competitive dynamics are shifting as hyperscalers begin to outpace local providers, and regional diversification beyond Warsaw accelerates to mitigate grid constraints.

Poland Data Center Market Trends and Insights

Surge in Hyperscale and Self-Build Investments by Global Cloud Service Providers

Capital expenditure from hyperscalers is reshaping the Poland data center market. Microsoft's PLN 3 billion (USD 750 million) phase-two outlay, Google's sovereign-cloud partnership with Domestic Cloud Provider, and Amazon's cumulative EUR 7 billion (USD 7.91 billion) commitment underscore long-term confidence in the location. New multi-building campuses multiply demand for power, cooling, and network backbones, creating a spillover effect for suppliers and contractors. Sovereignty-focused architectures draw heavily on regulated sectors such as BFSI and government agencies. In turn, the Poland data center market attracts AI and machine-learning workloads needing high-density compute, cementing the country as a regional digital hub.

Poland's Rapidly Growing Renewable Energy Pipeline Enabling Green Data Center Operations

The share of renewables in Poland's electricity mix reached 30% in 2024, aided by a 37% year-on-year surge in solar output. National targets call for 57 GW of renewable capacity by 2030, which lowers the carbon intensity of future hyperscale builds. Data center operators leverage long-term PPAs and on-site solar to hedge energy costs, while regulatory changes now let facilities install rooftop systems up to 150 kWp without permits. Beyond.pl's Poznan campus, sourcing 100% renewable electricity at a 1.2 PUE, illustrates feasible green operations. Sustainable credentials strengthen the export appeal of the Poland data center market toward ESG-driven European enterprises.

Scarcity of Power Grid Capacity in Warsaw Metropolitan Area

Available connection capacity in Warsaw fell 41% between 2022 and 2024, leaving only 3.8-4.4 GW for industrial users. Aging 110 kV lines and substation congestion trigger 12-24 month wait times for multi-megawatt hookups. Developers must finance on-site substations or pivot to secondary cities, prompting the Poland data center market to disperse beyond the capital.

Other drivers and restraints analyzed in the detailed report include:

Implementation of 5G and Edge-Computing Use Cases by Telecom OperatorsGovernment Cash-Grant Incentives Under the Polish Investment Zone SchemeLengthy Environmental Permitting for Large-Scale Facilities

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Massive sites represented 62.10% of the Poland data center market share in 2025, buoyed by hyperscale strategies that favour multi-building campuses exceeding 19,000 square meters. Atman's WAW 3 campus illustrates this scale advantage. Despite their heft, mega sites designed for AI model training are emerging as the next frontier. Medium size data center segment accounted for the fastest CAGR of 7.62% over the forecast period 2026 to 2031.

Higher rack densities and the adoption of liquid cooling push power requirements upward, but they also unlock compute efficiencies per square meter. Operators blend centralized and edge footprints to optimize the total cost of ownership and latency. In this design, massive campuses act as regional cores, while edge pods process time-critical data at network extremities, creating a hybrid topology that reshapes investment flows in the Polish data center market.

Tier 4 facilities captured 82.10% of revenue in 2025 and registered the fastest 7.88% CAGR, underscoring stringent uptime mandates. BFSI, healthcare, and public-sector workloads require 99.995% availability, propelling demand for concurrently maintainable designs. Beyond.PL's ANSI/TIA-942 Rated 4 site in Poznan pairs fault tolerance with a 1.2 PUE.

Tier 3 remains relevant for cost-sensitive enterprises, while Tier 1-2 facilities primarily serve staging environments. Ongoing EU regulations such as NIS2 tighten cyber-resilience standards, indirectly uplifting Tier 4 deployment rates. Consequently, the Poland data center market size weighted toward Tier 4 should rise steadily through 2031.

The Poland Data Center Market Report is Segmented by Data Center Size (Large, Massive, Medium, Mega, and Small), Tier Type

(Tier 1 and 2, Tier 3, and Tier 4), Data Center Type (Hyperscale/Self-built, Enterprise/Edge, and Colocation), End User (BFSI, IT and ITES, E-Commerce, Government, Manufacturing, Media and Entertainment, Telecom, and More), and Geography. The Market Forecasts are Provided in Terms of IT Load Capacity (MW).

List of Companies Covered in this Report:

Vantage Data Centers Management Company LLC Atman sp. z o.o. Beyond.pl sp. z o.o. Equinix Inc. Amazon Web Services Inc. Google LLC International Business Machines Corporation Microsoft Corporation Polcom S.A. 3S S.A. (Iliad Group - Play) DATA4 Group SAP SE Aruba S.p.A. FORPSI s.r.o. Cloudflare Inc. OVHcloud SAS Orange Polska S.A. T-Mobile Polska S.A. Netia S.A. Cyxtera Technologies Inc.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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