

Data Centers & General Demand

Where will the growth be?

Montel Benelux Energy Day
15 October 2026

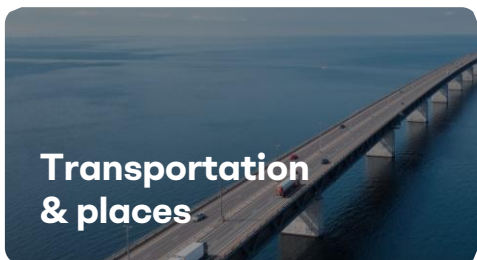
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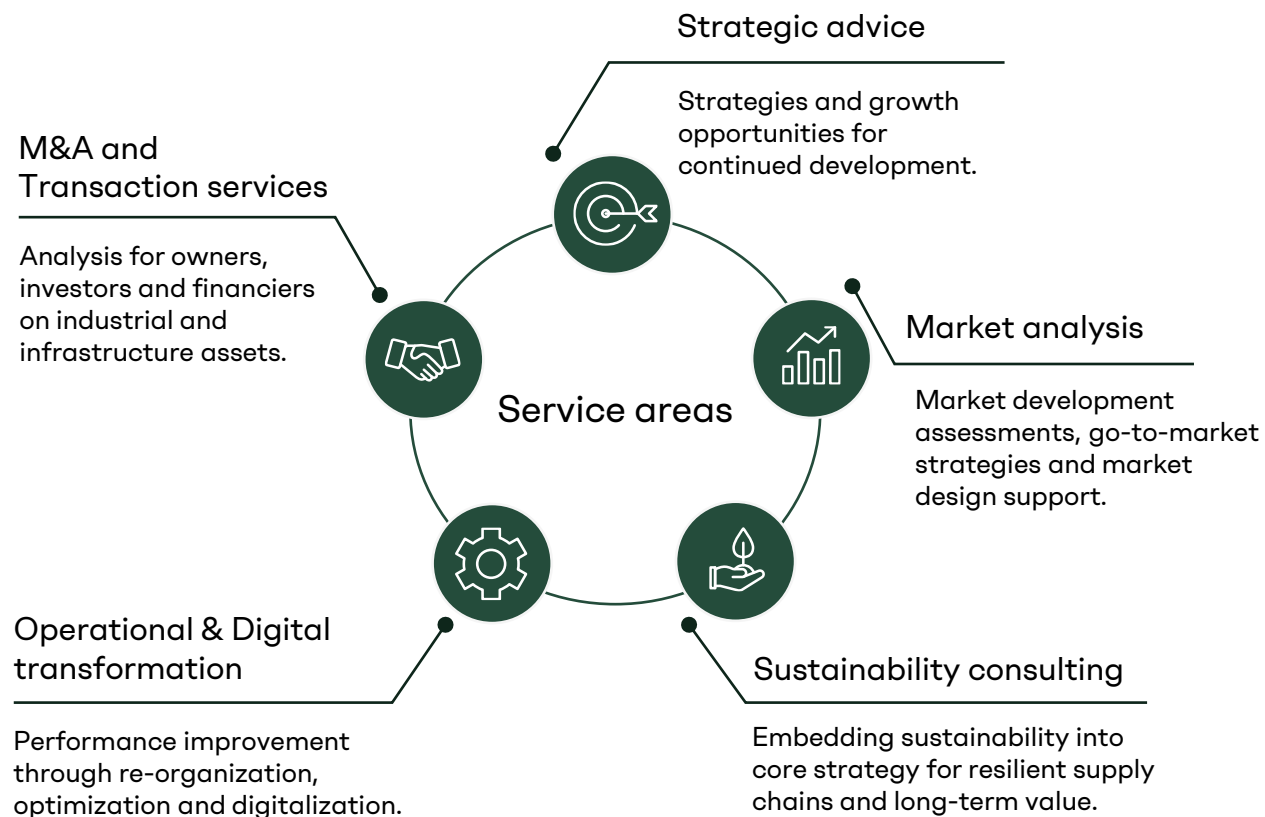
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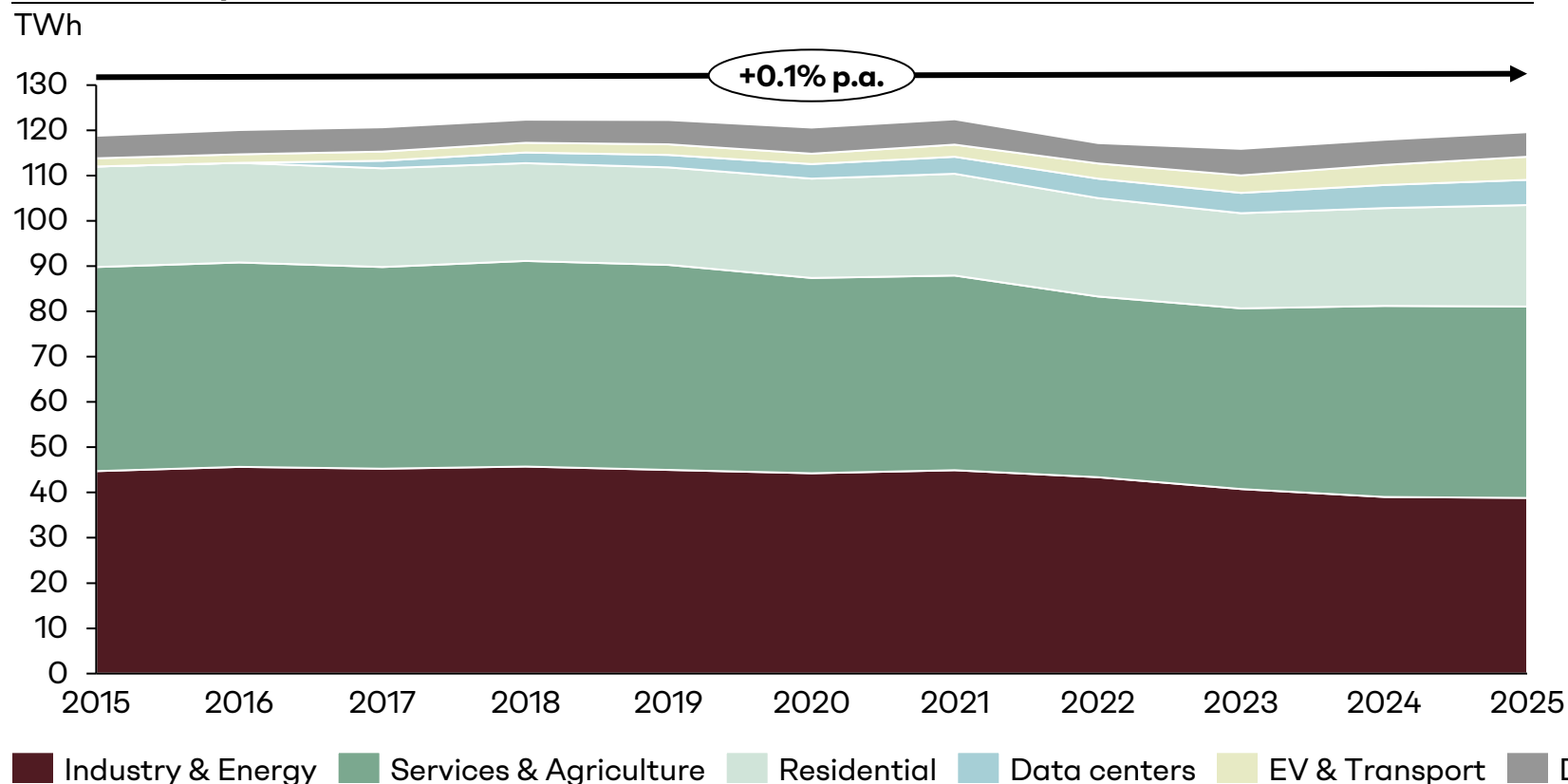
Securing partnerships with key players of the Dutch energy sector



Data centers & general demand - where has the growth been?

Electricity demand in the Netherlands has been flat, but its drivers are shifting as electrification of heat and transport and growth in data centers picks up

Final electricity demand for the Netherlands



On-site generation hides a growing share of real demand



Industry is shrinking for the wrong reasons



Electrifying heat and transport is now the main source of growth



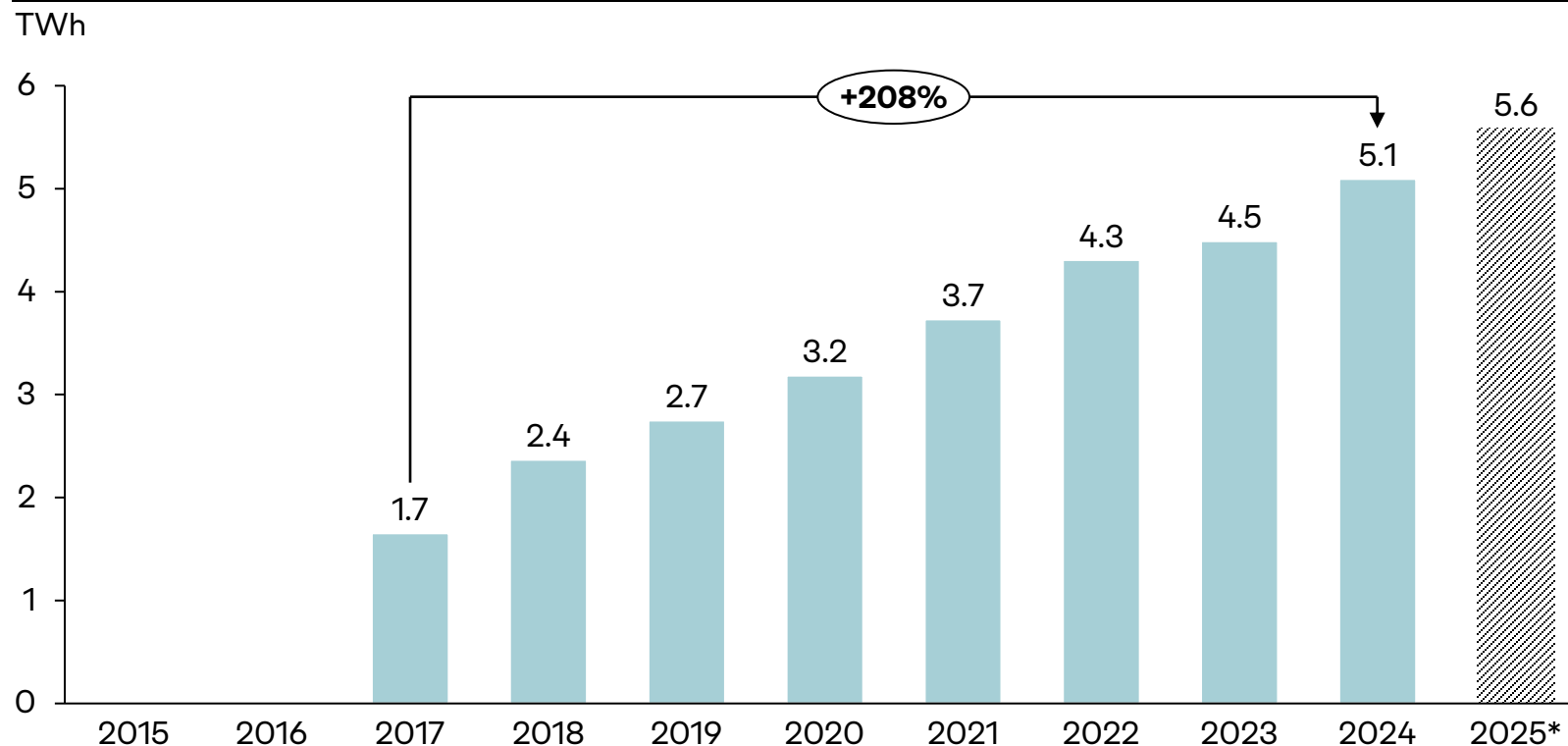
New demand arrives in large, location-specific blocks



Grid access is the binding constraint, and policy is rewarding flexibility

Data center demand has tripled since 2017, making it one of the few demand groups still growing — with a few large sites driving most of the consumption

Total data center demand in the Netherlands



Data-center electricity demand has grown rapidly and consistently



2024 saw the fastest recent growth

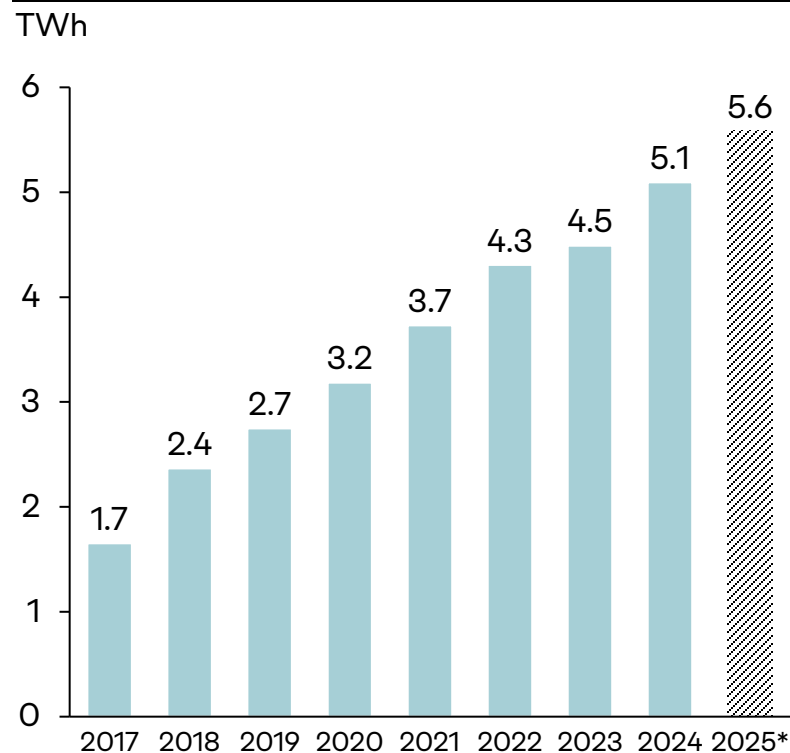


Despite siting restrictions, the electricity footprint keeps rising

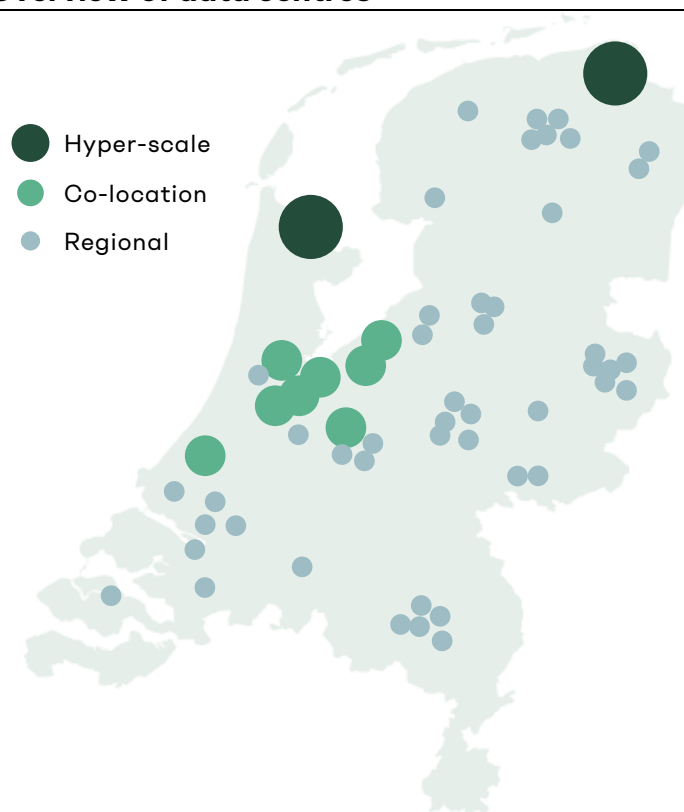
Notes: *Estimation based on extrapolating demand figures, as 2025 figures are unknown. Sources: 1. [CBS/CLO series](#) (2026)

Consumption is highly concentrated, roughly 45 large sites account for ~90% of data-center power demand, with the fleet clustered in the Noord-Holland province

Total data center demand in the Netherlands



Overview of data centres



Data-center electricity demand has grown rapidly and consistently



2024 saw the fastest recent growth



Despite siting restrictions, the electricity footprint keeps rising



~230 commercial data centers across 67 cities, ~50 market parties

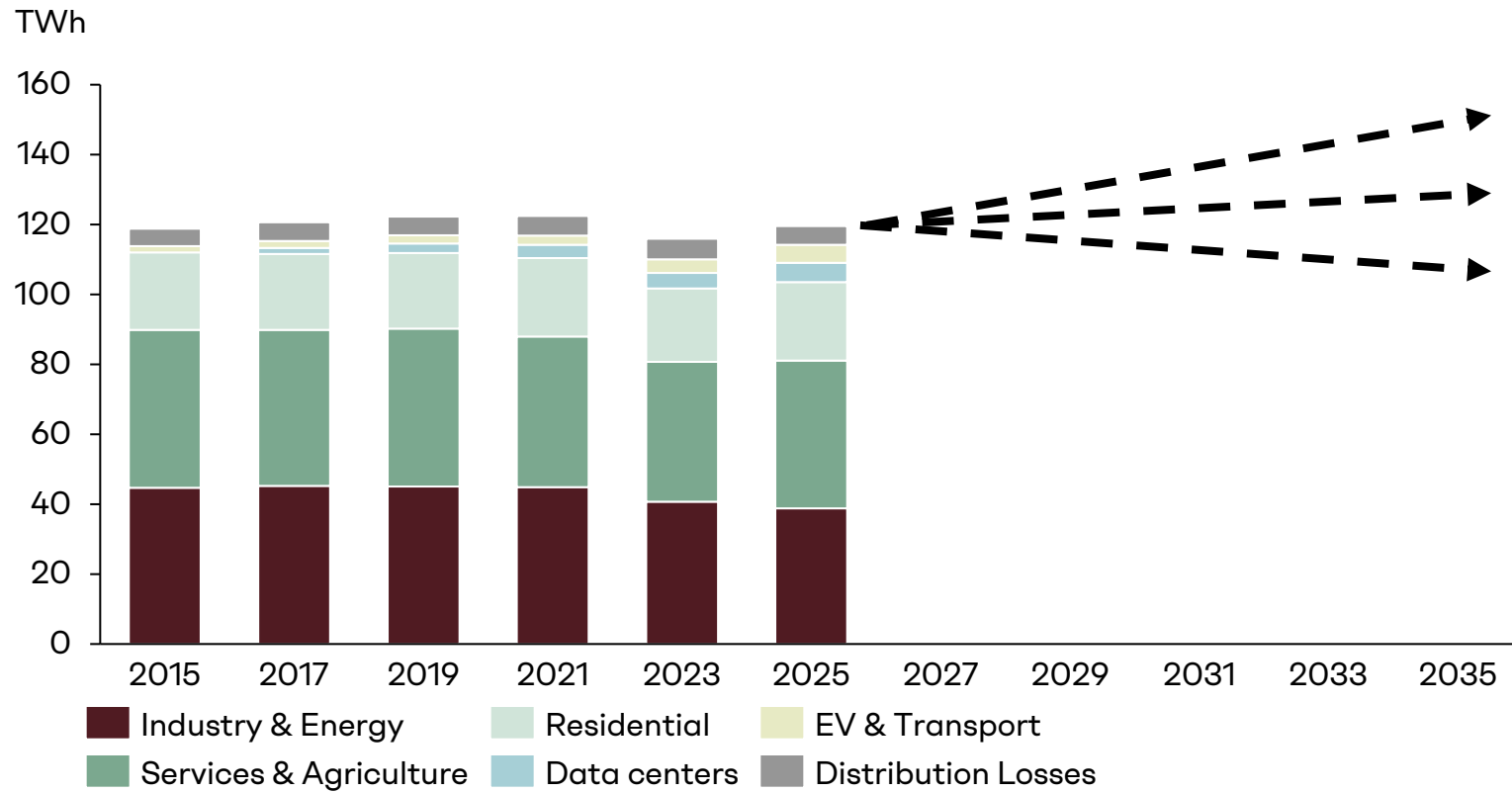


45 large sites account for ~90% of data-center electricity

Where will demand growth be in the next ten years?

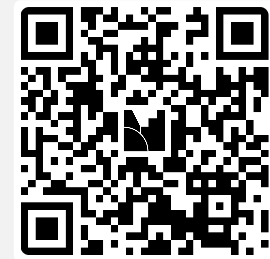
Electricity demand is expected to grow, but where, how quickly, and will it actually be able to connect?

Final electricity demand for the Netherlands



Which statement do you think will look most accurate by 2035?

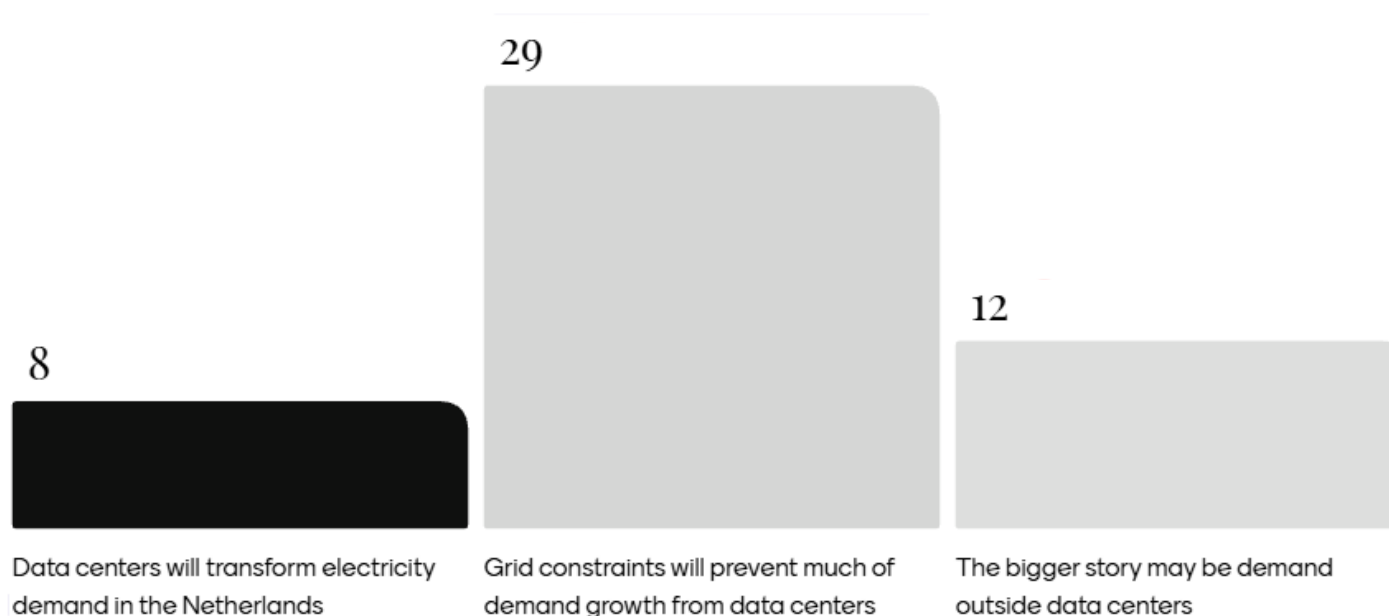
- Data centers will transform electricity demand in the Netherlands
- Grid constraints will prevent much of demand growth from data centers
- The bigger story may be demand outside data centers



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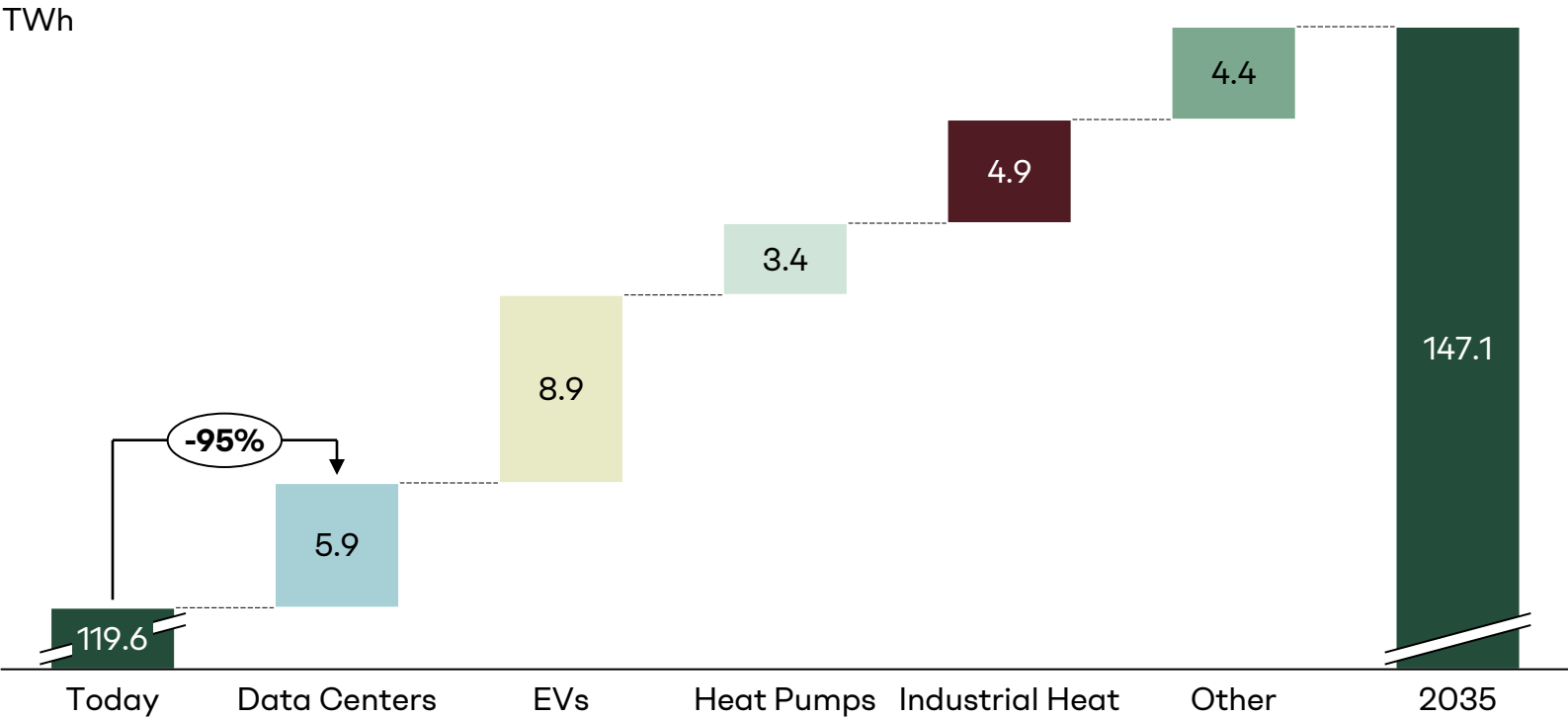
Most participants at Montel's Benelux Energy Day, viewed that grid constraints will prevent much of the expected demand growth from data centers

Which statement do you think will look most accurate by 2035?



Data Centers, EVs and the electrification of heat will become the main drivers of Dutch electricity demand over the next decade

Netherlands electricity demand



Data Centers demand to nearly triple by 2035



Electrification of heat & transport remains key growth driver



EVs and heat pumps improve system flexibility in mid- to long-term



Electrification of industrial heat starts to pick up in the first half of the next decade (2030s)

Growth in data center demand is dependent on policy and regulatory support, together with guaranteed grid connections



Spatial Laws & Policies

- This is redirecting new capacity toward smaller, distributed regional/edge sites and alternative hubs



ACM Priority Framework

- Has a negative impact on data center development, as data centers are not prioritized in this economic & societal framework



Energy Law

- The new energy law creates opportunities for cable pooling, which can provide opportunities for faster grid connections



PUE measurement obligation

- More transparency will be required from data centers on energy and water usage, including efficiency measures



TenneT Grid Connection court ruling

- This sets a fundamental precedent: requested capacity does not equal delivered capacity, with delays spanning years



Policy



Legislation



Subsidy



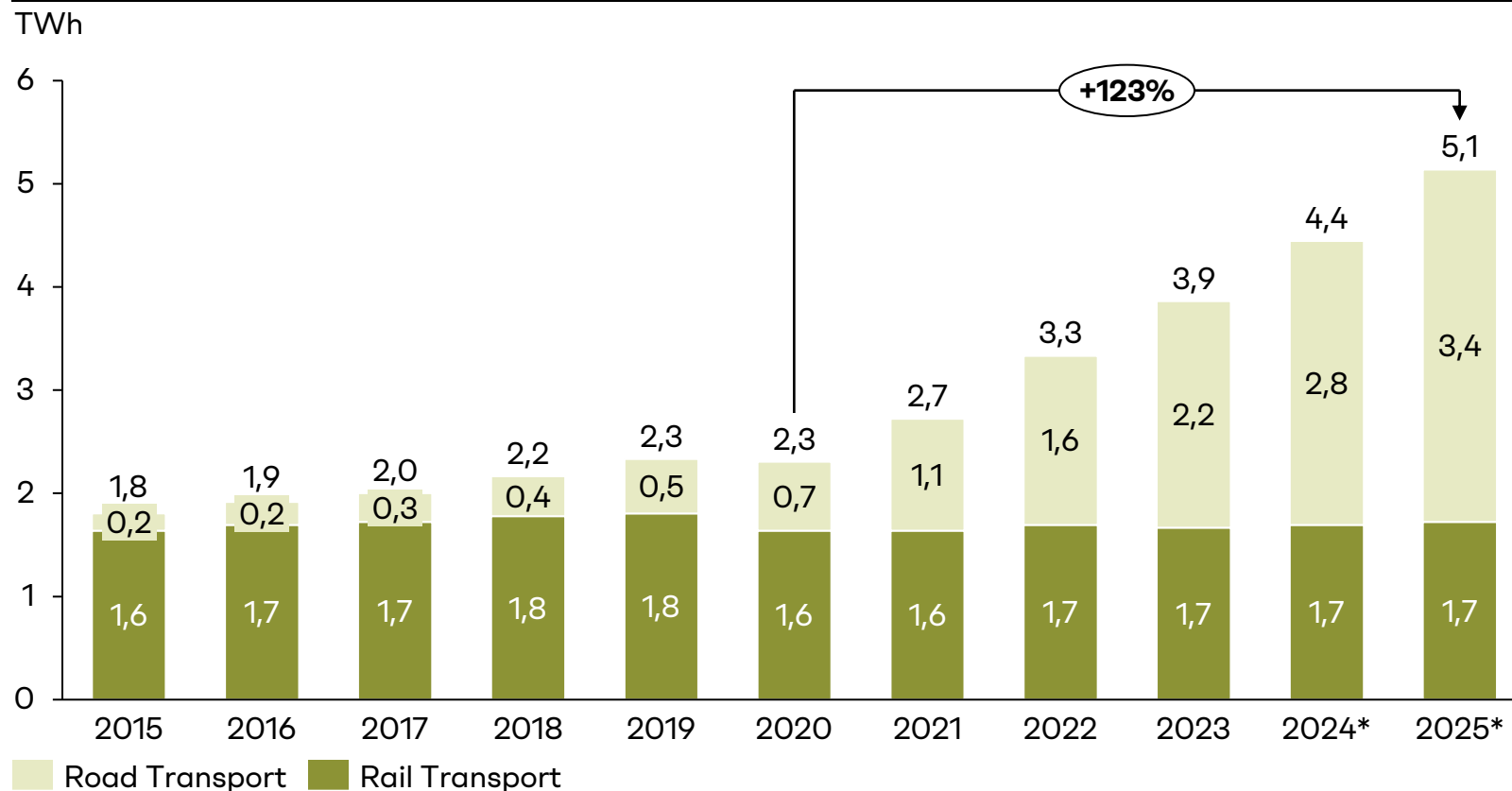
Tax

- **Spatial laws set new restrictions on data center build-out, while more regulation is set to follow on energy efficiency obligations**
- **The key challenge for data centers is grid connections, where cable pooling provides opportunities, but the ACM priority framework and the TenneT court ruling increase the chances of grid connection waiting times**

What of other demand segments, such as the electrification of transport and heat?

EV & Transport is the fastest-growing demand group as fleet electrification accelerates

Total EV & Transport demand in the Netherlands



EV & Transport is one of the fastest-growing demand groups



All of the growth comes from road transport



Growth is increasingly driven by electrification of vans + heavy transport



Despite rapid growth, EV & Transport is still only ~4.5% of total Dutch electricity demand

Notes: *Estimation based on extrapolating demand figures, as 2025 figures are unknown. Sources: 1. [CBS/CLO series](#) (2026)

For EVs there are concrete objectives for decarbonized transport, although strong tax-reduction support is disappearing fast



Taxable benefit of company cars

– This is expected to have a strong impact, as the Dutch EV market is very lease- and business-driven



Weight-based road taxes

– Primarily hits the private and used-car segments from 2026 onwards, where heavy EVs will become more expensive to own



BPM exemption

– Upfront costs of new purchases increase. While sales have grown, they have not grown as fast as in previous years.



100% emission-free new sales

– The long-term direction remains clear for car manufacturers offering EVs and for charging infrastructure providers.



Zero-emission zones

– This access restriction therefore strongly drives light transport EV adoption.

- While the tax benefits for EVs disappear, the targets remain unchanged
- Charging infrastructure and EV development are expected to support future EV growth, although a short-term slowdown can be expected due to tax regime changes



Policy



Legislation



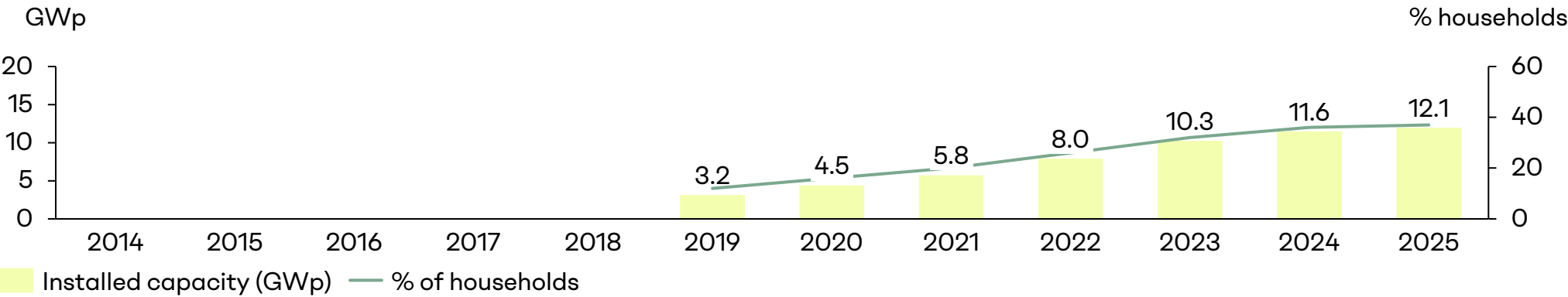
Subsidy



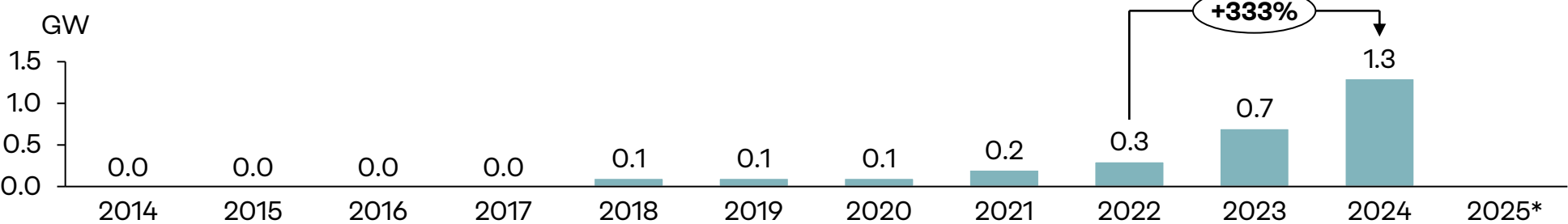
Tax

Adoption of at-home BESS systems in preparation for the abolishment of the net metering scheme, is set to drive self-consumption from EVs and heat pumps

Installed residential solar PV



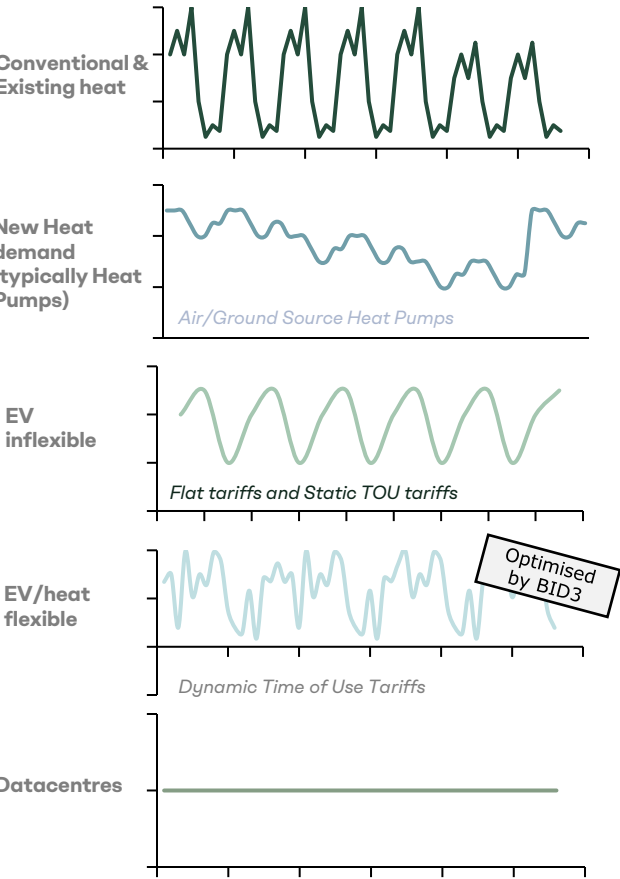
Installed residential BESS (GW)



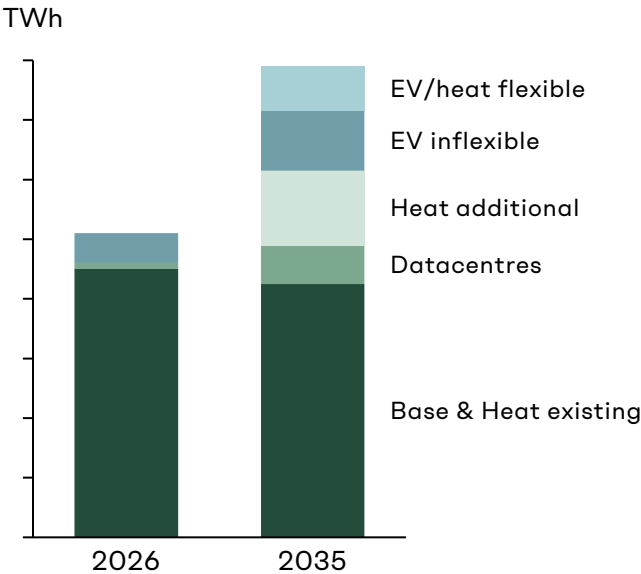
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Newer uses of electricity for heating and transport will see changes in the hourly demand shape over time

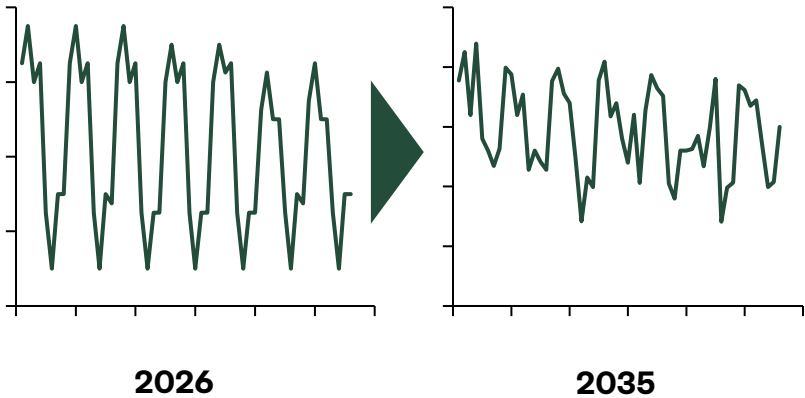
Different hourly profiles for different demand segments



Different growth rates for different segments



Hourly demand changes shape over time



Key takeaways

1. Dutch electricity demand is entering a new growth phase, led by data centers, EVs and the electrification of heat.
2. Data centers will be an important growth driver, but not the only or necessarily the largest one
3. Grid access, rather than demand appetite, will determine how much data-center growth is realised (at least in the short to mid-term)
4. The transition will change when electricity is consumed, not just how much is consumed

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