

WEEKLY INTELLIGENCE BRIEFING

PowerAether Intelligence

Regulatory & Grid Intelligence for Data Center Developers & Operators



EUROPE EDITION COVERAGE

Europe Edition · Issue #2 · May 10, 2026

poweraether.com

THIS WEEK'S FOCUS

ENTSO-E warns TSOs may be forced to reduce renewables penetration if data-centre growth is unmanaged. Germany's National Data Centre Strategy (March 18) targets capacity doubling by 2030; TSOs transition to a "maturity-based procedure" April 2026. Ireland CRU policy operational by March 31. EU Cloud and AI Development Act (CADA) due Q1/Q2 2026, possibly on the May 27 Commission agenda.

Regulatory status as of May 10, 2026. Several EU and member-state items in this issue remain *proposed, pending, or subject to further compliance steps*. Items are flagged where status is uncertain. Readers should verify current docket status before relying on them for transaction decisions.

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FROM THE EDITOR'S DESK

Europe converges on “first-ready, first-served” — with very different national flavours.

Six weeks into the new European data-centre regulatory cycle, the direction of travel is unmistakable. ENTSO-E's May 8 report on data centres and the power system warns that transmission system operators may be forced to reduce renewables penetration if hyperscale demand growth is unmanaged. The European Commission has already moved away from first-come-first-served grid connection allocation toward a *first-ready-first-served* model. Germany's National Data Centre Strategy (published March 18) targets a doubling of data-centre capacity by 2030 and quadrupling of AI/HPC (High-Performance Computing) capacity, with German TSOs transitioning to a "maturity-based procedure" for capacity allocation in April 2026.

Ireland's Commission for Regulation of Utilities (CRU) policy is now fully operational, with EirGrid and ESB Networks required to publish their engagement and connection processes by March 31, 2026. The UK's Ofgem and NESO consultation cycles closed in mid-April. **The single biggest forward catalyst is the EU Cloud and AI Development Act (CADA)**, expected as an agenda item at the May 27 Commission meeting; the Act aims to triple EU data-centre capacity within five to seven years and would establish a binding regulation with direct effect across all member states.

For developers, operators and counsel, the practical implication is unambiguous: **demand-side gatekeeping has replaced supply-side queue management**. From London to Dublin to Berlin, gaining grid access now requires demonstrating strategic value, technical maturity, and increasingly explicit renewables commitments. Section 5 is a deep dive on the converging first-ready-first-served frameworks; Section 3 maps queue lead times across the major European hubs; Section 6 covers the increasingly fragmented landscape of behind-the-meter and on-site power

strategies.

SECTION 01

Regulatory Radar — EU & National

European Commission | Cloud and AI Development Act (CADA) | Q1–Q2 2026

■ HIGH IMPACT

The European Commission’s 2026 work programme commits to proposing the Cloud and AI Development Act (CADA, also referenced as CAIDA in Commission documents) in the first quarter of 2026, with possible agenda placement at the **May 27, 2026 Commission meeting**. The indicative legal basis is Article 114 of the Treaty on the Functioning of the European Union (TFEU), meaning the Act would be a binding regulation with direct effect across all 27 member states. The Act aims to **triple EU data-centre capacity within 5–7 years** and fully meet the needs of EU businesses and public administrations by 2035. It will streamline deployment by identifying suitable sites and simplifying permitting, while addressing energy demand through efficiency requirements, innovative cooling, and integration with the broader energy system. Stakeholder concerns flagged in the public consultation (which closed July 2025): potential overlap with the Energy Efficiency Directive’s monitoring and reporting obligations (Google, Deutsche Telekom). State aid framework via the Clean Industrial Deal State Aid Framework (CISAF) is in scope.

Developer/Operator Impact: CADA is the single most consequential pending EU regulatory item for data-centre developers. The Act will likely establish minimum sustainability and innovation criteria that condition access to simplified permitting and State aid. Build scenario analysis into project pipelines for both publication paths: Q2 2026 publication (more likely) means draft text available for industry comment by Q3; delay into H2 2026 means status quo extends through year-end. The Article 114 legal basis means the regulation will harmonise across the EU-27 — which is structurally good news for cross-border hyperscalers but creates risk for projects relying on member-state derogations.

Sources: digital-strategy.ec.europa.eu · europarl.europa.eu (CAIDA) · whitecase.com

ENTSO-E | Data Centres and the Power System Report | May 8, 2026

■ HIGH IMPACT

On May 8, 2026, ENTSO-E (European Network of Transmission System Operators for Electricity) published its position report *Data Centres and the Power System: Expected Trends, Challenges, and Opportunities*. Headline warning: **European TSOs may be forced to reduce renewable energy penetration if data-centre demand growth is not properly managed**. ENTSO-E projects total European data-centre electricity demand to grow by more than 50% between 2025 and 2030, driven primarily by colocation and hyperscale expansion concentrated in established metropolitan hubs. The report calls on EU policymakers to legislate for data centres to function as flexible assets — providing system flexibility and demand-side response — ahead of CADA publication. It also endorses voluntary flexible connection agreements where firm capacity is years away, as a pragmatic time-to-power alternative.

Developer/Operator Impact: ENTSO-E’s position is the strongest TSO-level signal to date that hyperscale data centres in Europe will be expected to provide grid flexibility, not just consume firm capacity. Build demand-response capability into operational architecture from the design phase — ENTSO-E will likely lobby for CADA to include explicit flexibility obligations. Flexible connection agreements (counted as grid-connected only while interacting with the grid) are increasingly commercially viable in lieu of multi-year firm-capacity waits.

Sources: pv-magazine.com · entsoe.eu · enlit.world

EU | "First-Ready-First-Served" Grid Connection Proposal | December 2025

■ WATCH

The European Commission has proposed moving away from the traditional first-come-first-served (FCFS) model for grid connections to a first-ready-first-served (FRFS) approach, aligned with Ofgem's recent UK reforms. The proposal includes queue reform, recognition of system benefits of energy storage, and flexible connection agreements where resources are counted as grid-connected only while they interact with the grid. The proposal forms part of the broader EU electricity market design reform expected to inform CADA and the Q1 2026 Data Centre Energy Efficiency Package.

Developer/Operator Impact: FRFS is now the dominant European model — implemented in the UK (Ofgem/NESO), now Germany (per the National Data Centre Strategy), and being implemented in Ireland (CRU LEU policy). The EU's proposed Europe-wide harmonisation removes a key remaining arbitrage opportunity between member states.

Sources: energy-storage.news

SECTION 02

National Regulator Watch

Germany | National Data Centre Strategy + AgNES Process at BNetzA

■ HIGH IMPACT

On March 18, 2026, the German federal government published its *Nationale Rechenzentrumsstrategie* (National Data Centre Strategy). Headline targets: **double Germany's data-centre capacity by 2030 and quadruple AI/HPC capacity** over the same period. The Strategy commits to introducing a "first ready, first reserved" approach to grid connection requests, reducing electricity costs via electricity price compensation extension and tailored grid fees that recognise data centres' stable, continuous consumption profile. Grid fee reform is being delivered through Bundesnetzagentur's ongoing AgNES process (the legal framework for how network operators allocate grid costs to users). Separately, the leaked 36-page reform draft from the German economy ministry (January 2026) proposes: a redispatch provision for new renewables; regionally differentiated construction fees ("construction levy"); and capacity-limited grid sections where investors waive curtailment compensation for up to 10 years.

Developer/Operator Impact: Germany's Strategy is a strong political signal but the operational details are still in the BNetzA AgNES process. Expect draft BNetzA grid-fee decisions in May 2026 (storage) and end-June 2026 (broader). German Energy Efficiency Act's existing 50% renewables on balance-sheet (since January 2024) and 100% requirement (from January 1, 2027) remain firm — budget against the 2027 deadline. Waste heat integration, cooling optimisation, and energy transparency are now strategic priorities, not engineering details.

Sources: luther-lawfirm.com · ashurst.com · cleanenergywire.org

Ireland | CRU Large Energy Users Connection Policy — March 31 Implementation Milestone

■ HIGH IMPACT

Ireland's Commission for Regulation of Utilities (CRU) Decision Paper CRU/2025236 (published December 2025) entered the implementation phase: by **March 31, 2026**, EirGrid and ESB Networks were required to publish dedicated engagement and connection processes for data-centre applicants. The framework segments large energy users (LEUs) by maximum import capacity: <1 MVA, 1–10 MVA, and >10 MVA — with the >10 MVA tier determining hyperscale market outcomes. The policy requires 80% renewable energy commitments, locational signals on proximity to renewables, and onsite generation/storage availability requirements. Data centres now consume 22% of Irish national electricity demand (2024) — projected by EirGrid to reach 31% by 2034 in the median scenario. Dublin alone accounts for approximately 50% of regional electricity demand. System Operators must provide bi-annual reports to CRU on policy effectiveness.

Developer/Operator Impact: Ireland is now the strictest hyperscale grid jurisdiction in Europe. Pre-December 2025 applications continue under the 2021 framework; post-December applications face the full new regime. Practical priorities: (1) secure a credible renewables development plan tied to your project; (2) build in onsite generation/storage from the design phase to meet the autoproducer requirement; (3) treat Dublin as closed for new hyperscale unless paired with onsite power.

Sources: cru.ie · arthurcox.com · williamfry.com

UK | Ofgem + NESO Connection Reforms; PIA 2025 Streamlined Powers

■ HIGH IMPACT

The UK's Planning and Infrastructure Act 2025 (PIA) granted government and Ofgem streamlined powers (exercisable until December 2028) to push through changes to industry rules and grid connection arrangements. In Q1 2026, both Ofgem (Call for Input) and DESNZ (Department for Energy Security and Net Zero) ran consultations on demand grid connection reform. NESO (National Energy System Operator) published proposed updates to Connections Methodologies with the consultation closing **April 14, 2026**. Phase 1 of the reforms (Ofgem position expected spring 2026) targets generation connections; Phase 2 extends strengthened criteria to all demand sectors and is expected to prioritise AI Growth Zone projects and strategic-energy-plan-aligned developments. Ofgem also consulted on potential Independent Transmission Owner licences and expanded use of ramped/flexible connection agreements for modular data-centre energization.

Developer/Operator Impact: The UK queue is being structurally reset. Hyperscalers should: (1) align project siting with AI Growth Zones where possible; (2) embed modular/phased energization in commercial structures to enable ramped connection agreements; (3) prepare for Phase 2 demand criteria to take effect H2 2026. Existing connections may face re-prioritisation under the PIA-enabled queue review.

Sources: cms.law · bebeez.eu · ofgem.gov.uk

SECTION 03

TSO Grid Desk — Queue Times & Capacity

Connection queue lead times across major European data-centre hubs — current as of May 2026. The 3–7 year wait in Stockholm, Helsinki, and parts of Germany now exceeds typical hyperscale construction timelines (24–36 months), making site selection effectively a queue-position race. Amazon’s reported European 7-year wait (Reuters/Tom’s Hardware reporting, citing Ember analysis) illustrates the scale of the problem.

Major European hub connection lead times (≥50 MW)

Hub / TSO	Lead time (≥50 MW)	Allocation model	Notable
Frankfurt / Amprion	3–5 yr	Maturity-based (from April 2026)	AgNES grid-fee reform pending; National Strategy doubling target
London / NESO	4–7 yr	First-ready (Ofgem PIA-enabled)	AI Growth Zone prioritisation; Phase 2 demand criteria H2 2026
Dublin / EirGrid	Effectively closed	CRU three-tier (1, 10, >10 MVA)	22% → 31% national demand 2024–2034 projection
Stockholm / Svenska Kraftnat	3–7 yr	Queue + locational signals	Hyperscale spillover to Borlänge, Lulea
Helsinki / Fingrid	3–7 yr	Queue + fast-track strategic	1,400 MW added 2023–2024; TikTok 1bn EUR
Amsterdam / TenneT	Effectively closed	NL data-centre permitting pause continues	Diversification to Italy, Belgium, Poland
Paris / RTE	3–5 yr	Queue + Zone Reseau prioritisation	Limited public reform signalling
Norway / Statnett	12–18 mo (regions)	Hydropower surplus; subsea links	Polar DRA01 (Tordal), Google Skien
Spain / REE (CNMC)	18–36 mo	Standard queue	Lower power costs; emerging hub

Source: PowerAether tracker, consolidating Reuters/Ember reporting, TSO publications, DC Byte market intelligence, and law-firm regulatory updates. Lead times are indicative for new ≥50 MW applications.

Germany TSOs | Maturity-Based Procedure Implementation — April 2026

■ HIGH IMPACT

Germany’s four transmission system operators (Amprion, TenneT, 50Hertz, TransnetBW) presented a fundamentally revised capacity allocation procedure transitioning from "first come, first served" to a "maturity-based procedure", with implementation targeted for **April 2026**. The model assesses applicant projects against shovel-readiness, financing maturity, and strategic alignment with the National Data Centre Strategy targets. Sites with secured land, planning permission, signed offtake/PPA structures, and committed capital advance ahead of applications still in feasibility. Critically, the National Data Centre Strategy explicitly endorses tailoring grid fees to recognise data centres’ stable, continuous consumption profile — a positive cost-of-service signal for hyperscalers, though BNetzA must act independently on AgNES.

Developer/Operator Impact: The maturity-based procedure structurally advantages well-capitalised hyperscalers over speculative developers. Project pipelines should front-load planning consents and offtake structuring to maximise maturity scoring at application. Watch for BNetzA’s end-June AgNES milestone and Q3 2026 finalisation of the broader grid reform.

Sources: luther-lawfirm.com · etalytics.com

Ireland EirGrid | Fault Ride-Through Solutions for Large Demand Facilities

■ WATCH

EirGrid’s Large Demand Facility Fault Ride-Through proposed solutions require transmission-connected data centres to return to at least **90% of pre-fault demand within 500 milliseconds**. The Grid Code amendment is being developed jointly with stakeholders for transposition into the Distribution Code. This is a material technical commitment that requires careful coordination between UPS architecture, switchgear response, and onsite generation start-up profiles.

Developer/Operator Impact: Existing Irish data centres should commission third-party FRT performance audits ahead of Grid Code transposition. New projects must design FRT capability into mechanical/electrical from concept stage; expect 12–18 months of compliance work for legacy sites. Non-compliance risk: contractual capacity reduction by the System Operators.

Sources: [kpmg.com \(Ireland\)](https://kpmg.com/Ireland) · eirgrid.ie

SECTION 04

Connection Tariff & Cost Tracker (Europe)

European connection cost convergence: cost causation is now the dominant trend across all major jurisdictions. Termination/reduction-of-capacity rights, minimum-bill commitments, and renewables-tied conditionality are tightening. Germany’s AgNES process will likely reshape continental pricing models when concluded in 2026.

Jurisdiction	Threshold	Cost approach	Notable Issue #2 update
Germany	AgNES-defined (TBD)	Recognising stable-profile DCs	BNetzA AgNES; May 2026 storage draft; June 2026 broader
Ireland (CRU)	<1, 1–10, >10 MVA tiers	80% renewables + onsite gen	Operational from March 31; bi-annual CRU reports
UK (Ofgem)	Sector-wide reform	AI Growth Zone priority; ramped/flexible	Phase 1 spring 2026; Phase 2 H2 2026
Spain (CNMC)	≥50 MW typical	Standard tariff + tasa por solicitud	Limited public reform signalling; emerging hub
Nordics	≥50 MW typical	Tax incentives; locational pricing	F1 corp tax 18% by 2026; NO 2-yr depreciation
EU-level (proposed)	Sector-wide via CADA	First-ready-first-served	CADA expected May 27 Commission agenda

Source: PowerAether Europe tariff tracker.

SECTION 05

Grid Connection Regulation — The European "First-Ready-First-Served" Convergence

Across the four largest European data-centre regulatory regimes — EU-level (proposed), Germany, Ireland, and the UK — the model is converging on a common principle: **access to grid capacity is gated by demand-side readiness, not application date**. Each jurisdiction implements this differently, and the differences matter for hyperscaler site selection. The table below maps the four implementations against a common rubric.

The Four "First-Ready" Implementations — side-by-side comparison

	EU-level (CADA proposed)	Germany	Ireland (CRU)	UK (Ofgem/NESO)
Status	Q1–Q2 2026 proposal; May 27 possible	Strategy Mar 18; TSO procedure Apr 2026	Operational since Dec 2025; SO process Mar 31	Phase 1 spring 2026; Phase 2 H2 2026
Mechanism	Article 114 TFEU regulation	"First ready, first reserved"; maturity-based	Three-tier (<1, 1–10, >10 MVA); 80% renewables	PIA 2025 streamlined powers; AI Growth Zones
Renewables requirement	TBD in CADA text	50% (Jan 2024) → 100% (Jan 2027) per EEA	Credible renewables plan; locational signals	Strategic energy plan alignment
Onsite generation	CISAF State aid potential	Encouraged; waste heat integration	Required (autoproducer)	Modular/phased connection viable
Time-to-power if compliant	TBD (post-publication)	12–24 mo (estimate post-reform)	12–24 mo (>10 MVA tier)	12–36 mo (AI Growth Zone)
Time-to-power if non-compliant	TBD	3–5 yr (existing queue)	Effectively closed	4–7 yr

EU CADA: Article 114 TFEU Means a Single Market for Data-Centre Infrastructure

■ HIGH IMPACT

The Cloud and AI Development Act's indicative Article 114 TFEU legal basis (internal market harmonisation) means — if adopted in current form — it will be a binding regulation with direct effect across all 27 member states. This is structurally different from a Directive (which requires national transposition) and from the Energy Efficiency Directive's existing data-centre monitoring/reporting framework. CADA is expected to: identify suitable sites and simplify permitting for projects meeting sustainability/innovation criteria; promote energy efficiency and innovative cooling/power management; integrate data centres into the broader energy system; and operate alongside the Clean Industrial Deal State Aid Framework (CISAF) for sustainable data centres. Stakeholder feedback (Google, Deutsche Telekom) flagged consistency with Energy Efficiency Directive obligations as a compliance-cost concern.

Developer/Operator Impact: Article 114 TFEU regulation is the strongest possible EU instrument — hyperscalers benefit from one compliance regime across the 27 member states (plus EFTA/EEA via agreement). Plan for CADA to set the compliance floor; member-state rules become a ceiling above that. Forward-looking site selection should assume CADA sustainability and innovation criteria become a precondition for State aid and simplified permitting.

Sources: digital-strategy.ec.europa.eu · [Julien Simon analysis](#)

UK Ofgem PIA 2025: Streamlined Powers, AI Growth Zones, and Queue Reset

■ HIGH IMPACT

The UK's Planning and Infrastructure Act 2025 (PIA) is the most aggressive demand-side connection reform in any major European jurisdiction. Phase 1 (Ofgem position expected spring 2026): generation connections + strategic energy plan alignment. Phase 2 (H2 2026): strengthened criteria extended to all demand sectors, with AI Growth Zone projects and strategic-energy-plan-aligned developments prioritised. Operational mechanics include: expanded self-build of high-voltage assets (with Electricity Act 1989 clarification); potential Independent Transmission Owner licences; expanded ramped and flexible connection agreements (allowing phased energization of modular data centres).

Developer/Operator Impact: The UK is now the most operator-friendly environment in Europe for hyperscalers willing to align with AI Growth Zone siting. Modular project structures (5–10 phases, each 50–100 MW) gain a structural advantage under ramped/flexible connection agreements. Legacy queue positions are at risk of revaluation under PIA powers.

Sources: [cms.law](https://www.cms.law) · [bebeez.eu](https://www.bebeez.eu)

SECTION 06

On-Site & PPA Power Strategies (Europe)

Germany | Energy Efficiency Act: 100% Renewables on Balance Sheet from January 1, 2027

■ HIGH IMPACT

Germany's existing Energy Efficiency Act remains the most demanding renewables obligation on data centres in Europe. Operators must cover **50% of electricity demand with renewables on a balance-sheet basis from January 1, 2024, rising to 100% from January 1, 2027**. The National Data Centre Strategy reinforces this trajectory. Compliance is achieved primarily through PPAs (power purchase agreements) and Guarantees of Origin, with corporate PPA volumes in Germany growing materially in 2025–2026 in response. The Strategy explicitly emphasises **waste heat integration** as a strategic priority — some German municipalities are now linking permitting to district heating contributions.

Developer/Operator Impact: The 2027 100%-renewables deadline is **22 months away**. Operators without PPAs in place should lock volumes immediately — corporate PPA prices are rising as demand stacks. For new builds, waste heat off-take agreements with district heating operators are becoming a permitting accelerator in Frankfurt, Berlin, and Hamburg. The German Energy Efficiency Act's reach extends through Guarantees of Origin to non-German subsidiaries, so multinational compliance design must account for this.

Sources: [etalytics.com](https://www.etalytics.com) · [cleanenergywire.org](https://www.cleanenergywire.org)

Ireland | Onsite Generation Requirement — Autoproducer Obligation

■ WATCH

Under the CRU LEU Connection Policy, data centres are required to present a credible plan for development of associated renewable projects and, in many cases, onsite generation/storage. The Government policy explicitly states that "islanded" data centre developments (not connected to the electricity grid and powered mainly by on-site fossil fuel generation) are **not in line with national policy**. CRU has not introduced new measures for gas connections at this stage but will consult on interruptible gas capacity products in the near term. Distinct from earlier 2021 framework, the new policy segments LEUs by capacity tier (<1, 1–10, >10 MVA) with different minimum performance and availability requirements.

Developer/Operator Impact: Pure on-site gas BTM (behind-the-meter) is increasingly off the table in Ireland as a permanent solution; bridging use during grid reinforcement remains acceptable. Onsite battery storage (2–4 hour duration) paired with a credible renewables development plan is the emerging viable path. Termination and reduction-of-capacity rights in the new contractual framework warrant careful legal review before commitment.

Sources: [arthurcox.com](https://www.arthurcox.com) · [pinsentmasons.com](https://www.pinsentmasons.com)

Continental "Shadow Grid": Private Gas Plants as Stop-Gap

■ WATCH

Tom's Hardware and other technical-trade reporting through Q1 2026 documents a growing pattern of data-centre developers building private natural-gas "shadow grid" power plants to sidestep multi-year grid connection waits in established hubs. The strategy: pair the data centre with privately financed gas turbines sized to bridge grid reinforcement timelines (typically 3–5 years), with the eventual transition to firm grid capacity contractually committed. The approach is in tension with the German Energy Efficiency Act's renewables obligations and the EU's broader decarbonisation trajectory, but remains commercially viable where time-to-power is the dominant project economics variable.

Developer/Operator Impact: The shadow-grid path carries material regulatory and reputational risk. Document the bridging-use rationale in the project commercial structure; consider co-located battery storage to manage emissions intensity during the bridging period. Watch for EU-level CADA provisions that may explicitly constrain this approach under sustainability criteria for State aid eligibility.

Sources: tomshardware.com

SECTION 07

Deals, Projects & Market Signals

Date	Project / Counterparty	Significance
Q1 2026	Evroc €3bn raise (Sweden)	Two hyperscale facilities; demonstrates domestic European hyperscale capability
2025	TikTok €1bn Finnish facility	Validates Finnish hyperscale AI infrastructure attractiveness
2025	Google €600M Skien (Norway)	Growing hyperscaler interest in Norwegian hydropower
2025	Polar DRA01 Tordal Phase 1 (Norway)	12 MW initial; 100% hydropower; AI-ready liquid cooling
Pending	Polarnorde Lappeenranta (Finland)	150 MW announced; hyperscale potential
May 2026	ENTSO-E Data Centres Report	TSO position: renewables at risk if DC growth unmanaged
Mar 2026	Germany National DC Strategy	Doubling capacity by 2030; quadrupling AI/HPC
Apr 2026	German TSOs maturity-based procedure	Replaces "first come, first served" capacity allocation

PowerAether tracks announced deals ≥ 100 MW with public regulatory or financial filings.

SECTION 08

Regulatory Calendar — Next 90 Days

Date	Filing / Action	Authority
Apr 14, 2026	NESO Connections Methodologies consultation deadline (closed)	NESO (UK)
May 2026	BNetzA draft decision on storage grid fees	BNetzA (Germany)
May 27, 2026	Possible CADA agenda item at Commission meeting	European Commission
End-June 2026	BNetzA AgNES process milestone	BNetzA (Germany)
Q3 2026	German grid reform draft → law	BMWK (Germany)
H2 2026	UK Ofgem Phase 2 demand criteria position	Ofgem (UK)
H2 2026	Hydro-Quebec-equivalent EU member-state pricing moves expected	Multiple
End-2026	Ireland CRU bi-annual policy effectiveness report (first)	CRU (Ireland)
End-2028	PIA 2025 streamlined powers expire (UK)	Ofgem / DESNZ
Jan 1, 2027	Germany Energy Efficiency Act: 100% renewables on balance sheet	Germany (existing law)

Calendar maintained from European Commission, ENTSO-E, BNetzA, CRU, Ofgem/NESO publications and primary law-firm regulatory alerts. Dates subject to change.

SECTION 09

The Bottom Line — 3 Takeaways for Leadership

1**First-ready-first-served is now the dominant European model — FCFS is dead from London to Dublin to Berlin.**

The UK PIA 2025 streamlined powers, Germany's maturity-based procedure (April 2026), Ireland's CRU LEU policy (operational since December 2025), and the EU's CADA proposal all replace first-come-first-served queue allocation with demand-side gatekeeping. Hyperscaler strategy should reorganise around demonstrating strategic value, technical maturity, and renewables commitments at application — not racing for queue positions. Project pipelines should front-load planning consents and offtake structuring; legacy queue positions are at risk of revaluation under regulatory reset powers.

2**Demand-side gatekeeping has replaced supply-side queue management — strategic value beats queue position.**

European TSOs (per ENTSO-E's May 8 position) will not absorb the projected 50%+ data-centre demand growth 2025–2030 without active management. Each major regulator now applies its own strategic-value criteria: AI Growth Zones (UK), National Strategy alignment (Germany), 80% renewables + onsite generation (Ireland). DC developers must demonstrate that their project advances national/regional strategic objectives, not merely that they applied first. The PJM-equivalent "BYONG" (Bring Your Own New Generation) concept is implicit in the Irish autoproducer requirement and emerging German practice.

3**The EU CADA in Q2 2026 will either harmonise or fragment the patchwork — either way, ahead-of-the-curve regulators set the floor.**

If CADA publishes in May–June 2026 with Article 114 TFEU binding regulation effect, hyperscalers gain a single EU-wide compliance regime as a floor, with member-state criteria layered above. If publication slips into H2 2026 or beyond, the German/Irish/UK national frameworks become the de facto European standard by default. Either way, the three jurisdictions that moved early — Germany, Ireland, and the UK — set the regulatory floor. Spain, the Nordics, and emerging diversification markets (Italy, Belgium, Poland) will be measured against this floor.

Key Reference Links · energy.ec.europa.eu · entsoe.eu · ofgem.gov.uk · cru.ie · bundesnetzagentur.de · eudca.org · poweraether.com