



MARKET INTELLIGENCE TEASER

CONFIDENTIAL — FOR INTENDED RECIPIENT ONLY

STATE OF INDIA'S DATA CENTRE BOOM

The \$100B+ wave reshaping India's digital infrastructure — every major project, state, policy move and timeline in one source-linked document.

1.8 GW	4.5 GW PIPELINE	\$126B COMMITTED	7+ GW BY 2030
Operational IT capacity, H1 2026 (Savills)	1.3GW building + 3.2GW secured (BNEF)	Cumulative commitments through 2025	Projected live capacity (Savills)

Document	Edition	Classification	Prepared by
Free Teaser · v1.0	September 2026	Confidential — preview	Gridvik Research

Compiled entirely from public sources — company press releases, official government portals and policy dashboards, and credible industry reports. Every figure is source-cited in the full tracker. This teaser is free; the paid intelligence service is described in Section 8. Gridvik is an independent research firm — not affiliated with any operator, investor or government body. This is market intelligence, not investment advice. © 2026 Gridvik.

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WHY THIS MATTERS NOW

India is now the #1 data-centre market in APAC outside China (BloombergNEF, August 2026), with live capacity quadrupling in six years. Google, Microsoft, Amazon, Meta, OpenAI (via Tata), Reliance, Adani and a dozen global operators are committing capital at a pace India has never seen in digital infrastructure.

Yet the market data remains scattered across press releases, state portals and media reports — this document is a preview of our effort to put it all in one verified, source-linked database.

1. THE MEGA-PROJECTS (TOP 20, VERIFIED)

Project	Who	Where	Capacity	Investment	Status
Google AI Hub	Google + AdaniConneX + Airtel	Visakhapatnam, AP	1 GW (3 campuses, 601 ac)	\$15B — India's largest single FDI	Groundbreaking Apr 2026; live ~2028
Jamnagar 3GW cluster	Reliance Industries	Jamnagar, GJ	3 GW	\$20–30B est. (Bloomberg)	Announced
Vizag AI campus (JV)	Reliance + Brookfield + Digital Realty	Visakhapatnam, AP	1 GW + 6GWp solar	\$11B by 2030	MoU Nov 2025
Meta built-to-suit DC	Reliance builds, Meta leases	Jamnagar, GJ	168 MW	n.d. (Meta pays energy+water)	Delivery ~2028
Adani MH hyperscale	Adani Group	Mumbai/NM/Pune	1 GW	₹50,000 Cr (~\$6B)	MoU Davos Jan 2024
TCS HyperVault 1GW	TCS (TPG-backed)	India (TBD)	1 GW	Up to \$7B	Announced Nov 2025
OpenAI–Tata Stargate DC	TCS HyperVault + OpenAI	India (TBD)	100 MW → 1 GW	n.d.	Announced Feb 2026
Microsoft India South Central	Microsoft	Hyderabad	3-AZ region	Part of \$20.5B commitment	Live Aug 2026
AWS Bharat Future City	AWS	Hyderabad	n.d.	Part of ₹60,000 Cr TS commitment	Groundbreaking Jul 2026
AWS India program	AWS	Hyderabad + Mumbai	n.d.	\$21B (2026–30)	Under construction
Solstice Kerala AI HPC	Solstice Data (Dubai)	Mattannur, KL	n.d. (100 acres)	₹52,600 Cr (~\$5.7B)	MoU Mar 2026
L&T Kancheepuram DC	Larsen & Toubro	Tamil Nadu	n.d.	₹15,000 Cr (~\$1.8B)	MoU Jun 2026
STT GDC Chennai expansion	STT GDC India	Siruseri, Chennai	45 MW (Ph1 live)	Part of ₹4,200 Cr TN MoU	Ph1 live Feb 2026
Sify Chennai AI campus	Sify Infiniit Spaces	Chennai	130+ MW design	₹10,000+ Cr	Inaugurated Jun 2026
Sify Rabale mega campus	Sify Infiniit Spaces	Navi Mumbai	200 MW design, 10 towers	n.d.	5 towers operational
PDG India 1GW portfolio	Princeton Digital Group	Mumbai+Hyd+Chennai	1 GW total	\$2.5B committed	210MW acquired Mar 2026
NTT Noida 2 campus	NTT GDC India	Noida	52.8 MW	n.d.	Ph1 (22.4MW) live
Yotta D1 + NIDP park	Yotta (Hiranandani)	Greater Noida	250 MW park	₹39,000 Cr MoU	Live/expanding
CtrlS national scaling	CtrlS + CPP Investments	Multiple	n.d.	₹7,000 Cr commitment	Ongoing
Nxtra expansion program	Nxtra (Alpha Wave/Carlyle)	Multiple	400MW+ plan	\$1B raised at \$3.1B valuation	Ongoing

Full tracker version: 48+ rows with phase plans, source URLs, confidence scores (1–3) and last-verified dates.

2. WHERE IT'S HAPPENING — THE STATE MAP

State	Position today	What's coming
Maharashtra	55% of India's live capacity (BNEF); Mumbai 49% city-share	Adani 1GW; PDG/Sify/Rovision/Prestige Navi Mumbai cluster; AWS Mumbai region
Andhra Pradesh	Emerging mega-hub	Google \$15B 1GW hub + Reliance-Brookfield-DR \$11B 1GW — Vizag becoming Asia's largest DC cluster
Telangana	Established cloud region hub	AWS ₹60,000 Cr + Bharat Future City; Microsoft's largest India region live in Hyderabad
Tamil Nadu	Chennai = 18% national share; subsea-cable advantage	L&T ₹15,000 Cr; STT GDC ₹4,200 Cr; Sify 130MW AI campus; PDG CH1 72MW
Uttar Pradesh	101 MW commercialized; 644 MW proposed (govt dashboard)	8 DC parks planned; ₹2 lakh crore AI-hub target; Noida corridor: Yotta, Adani, NTT, STT, CtrlS
Gujarat	New policy powerhouse	Viksit DC Policy 2026-29: 7.5GW target; Reliance Jamnagar 3GW + Meta 168MW anchors
Kerala / Odisha / WB / MP	Early stage	Solstice ₹52,600 Cr (KL); HCLTech+Sarvam sovereign AI hub (OD); Yotta 250MW (WB); CtrlS Bhopal

Today's capacity is hyper-concentrated (Maharashtra 55%), but the next 5 GW is dispersing — toward power-rich coastal sites and policy-aggressive states. Where power and policy are winning is the single most valuable question in this market right now.

3. POLICY PULSE — STATES COMPETING FOR THE WAVE

State	Policy / mechanism	Headline numbers
Gujarat	Viksit Gujarat Data Center Policy 2026-29	7.5 GW target; ₹6 lakh crore; ECFI up to ₹60,000 Cr/GW; 4% interest subsidy 10 yrs
Uttar Pradesh	UP Data Centre Policy 2021 (amended 2022)	29 MoUs worth ₹1,36,124 Cr; 644 MW proposed; single-window + PMU; 8 parks in 2026 vision
Maharashtra	IT Support Services Policy 2023 (DC chapter)	Stamp duty 50–100% waiver; electricity duty waiver 10–15 yrs; essential-service status
Telangana	Direct MoU + facilitation route	AWS ₹60,000 Cr; CM-level monthly reviews; Bharat Future City DC zone
Andhra Pradesh	AP EDB MoUs	601.4 acres to Google hub; dedicated 6GWp solar for Reliance JV; subsea gateway
Others	MoU-driven (TN, KL, OD, WB)	L&T ₹15,000 Cr (TN); Solstice ₹52,600 Cr (KL); HCLTech ₹15,000 Cr (OD); Yotta ₹8,500 Cr (WB)

No national subsidy race exists yet — states compete bilaterally with anchor investors. The window for a neutral comparative-incentive dataset is exactly now, before consultants lock this space.

4. THE POWER LAYER — WHERE THE REAL BOTTLENECK LIVES

Data centres are power businesses wearing a real-estate costume. Every major 2025–26 announcement in India has an explicit power strategy embedded — and this is the layer most market reports completely miss.

Project	Power strategy (verified)
Google Visakhapatnam hub	Co-investment in new transmission lines, clean energy generation and storage in AP (with Adani)
Reliance-Brookfield-DR Vizag	6 GWp dedicated solar project for a 1 GW campus
Reliance-Meta Jamnagar	Renewable-powered; cooled with desalinated seawater; Meta covers full energy + water cost
Adani Maharashtra 1GW	Renewable-powered + deemed-distribution investment
Nxtra national network	140,208 MWh RE wheeling (48 MWdc solar + 24.3 MW wind captive); RE100 member
Sify Rabale campus	99 MW solar + wind; onsite 110/220 KV substations
PDG Mumbai MU1	25-yr RE agreement with Tata Power Renewables; time-matched carbon-free energy pilot
CtrlS	MoU with NTPC Green Energy for renewable supply
UP state plan	~900 MW dedicated DC demand: new substations, strengthened transmission, RE push

The full tracker scores every district on power readiness: surplus/deficit, industrial tariffs, DISCOM health, open-access ease and renewable availability. Site selection in India is now 80% a power decision — and almost no dataset quantifies it.

5. TIMELINE 2026–2030 — WHEN THE WAVE LANDS

When	Milestone (all dated from primary sources)
Q1 2026	Microsoft \$17.5B India commitment; Solstice Kerala ₹52,600 Cr MoU (Mar); PDG 210MW acquisition (Mar); Nxtra \$1B round at \$3.1B (Mar)
Q2 2026	Google Vizag groundbreaking (Apr 28); L&T ₹15,000 Cr TN MoU (Jun); Reliance-Meta Jamnagar 168MW (Jun); Sify 130MW Chennai inaugurated (Jun)
Q3 2026	AWS Hyderabad groundbreaking (Jul); Microsoft India South Central live (Aug); Gujarat DC Policy notified
2027	India capacity est. ~2.1 GW (JLL); ~500 MW new supply added in 2026 alone (CBRE)
~2028	Meta Jamnagar delivery (2-yr horizon); Google Vizag first capacity; AWS \$21B program mid-flight
2029–30	Gujarat 7.5 GW horizon; TCS 1 GW HyperVault; India market est. \$22B (Vestian); 7+ GW live (Savills)

6. WHO IS BUILDING — THE OPERATOR LANDSCAPE

Player	India scale (verified)	2025–26 moves
NTT GDC India	265+ MW, 18 DCs	Noida 2 campus (52.8 MW); Mumbai Chandivali flagship
STT GDC India	Multi-city leader	Chennai Siruseri 45 MW; MoUs with TN/KR/MH/TS/UP
Sify Infnit Spaces	100 MW live → +350 MW plan	Chennai 130MW AI campus; Rabale 200MW; IFC loan
Nxtra by Airtel	11 large + 120 edge DCs	\$1B raise at \$3.1B valuation; Vizag Google hub connectivity
AdaniConneX	1 GW platform vision	Google Vizag partner; \$1.44B green financing; MH 1GW MoU
Princeton Digital Group	1 GW operating+planned	\$2.5B committed; MU1 Mumbai 150MW; CH1 Chennai 72MW
CtrlS	15 DCs, 8 markets	CPP ₹7,000 Cr; Chennai park; Bhopal; NTPC Green MoU
Yotta (Hiranandani)	Greater Noida flagship	₹39,000 Cr UP MoU; 250 MW WB park
TCS HyperVault	1 GW target	TPG-backed ₹18,000 Cr platform; OpenAI first customer
Hyperscalers direct	Google / Microsoft / AWS / Meta	\$15B + \$20.5B + \$21B + Jamnagar lease respectively

Third-party operators alone hold 1+ GW installed and 4.5+ GW planned (SBI sector report, Apr 2026). Hyperscalers drive 60–70% of new colocation demand.

7. THE NUMBERS THAT DEFINE THIS MARKET

Metric	Value	Source
New capacity H1 2026	+258 MW (up 59% YoY)	Savills
Data centres in India today	164 (vs 5,000+ in the US)	Vestian
Market value 2025 → 2030	\$10B → \$22B	Vestian
Hyperscale share of operational	36%	Savills
City share	Mumbai 49% / Chennai 18%	Vestian
Cumulative commitments	\$126B; \$16.4B deployed in 2025	Industry assessments
Under development + planning	700+ MW + 1–2 GW	Vestian
Global additions India could capture	4–5% (2026–32)	Sector outlooks

Capacity doubles every 2–3 years, capital is front-loaded, and supply is concentrating in six corridors. Anyone deploying capital, equipment or services into this market needs the same three answers: what is being built, where, and on what timeline. That is the entire product.

8. GRIDVIK PLANS — BEYOND THIS TEASER

Plan	What you receive	Price
SIGNAL (free)	This 10-page teaser, the weekly newsletter, and the public market snapshot. Follow the boom before you invest in it.	\$0
DEEPDIVE (one state, one-time)	A 25–35 page state report in which EVERY tracked project gets a full detail card: capacity & phase plan, investment & financing, power & connectivity strategy, policy incentives secured, status & timeline, equipment procurement window, and the complete source trail — plus policy-vs-neighbours comparison, power readiness analysis and 12-month outlook. Delivered as PDF plus the state's full structured CSV.	\$1,500
GRIDFEED (weekly subscription)	The complete live dataset: full master CSV of every tracked project in India (all fields, all sources) delivered every Monday with all verified new announcements, status changes and policy movements; live dashboard access; procurement-window alerts for your equipment category or state. Cancel anytime.	\$500/mo or \$5,000/yr
ADVISORY (custom mandate)	A market-entry or due-diligence brief built around your specific questions — target states, counterparties, power strategy, timeline risk — delivered in 3 weeks with two analyst calls and 30 days of follow-up support.	from \$5,000

Positioning: global consultancies charge \$25,000–\$60,000 and take three months for comparable scope. Gridvik delivers faster, every figure source-linked, and the dataset keeps refreshing weekly after delivery.

9. METHODOLOGY, SOURCES & DISCLAIMER

All data compiled from public sources only: official company press releases, government portals and policy dashboards, regulatory-filings coverage, and established industry media/reports. Every database row carries source URL(s), announcement date and a 1–3 confidence score; rows not re-verified within 30 days are flagged. “Announced” ≠ “under construction” ≠ “live” — status distinctions are never mixed; conflicting figures are reported side-by-side, not averaged away.

Primary sources used: AdaniConneX & Adani Group press rooms · Airtel/Nxtra · STT GDC India · NTT · PDG · CtrlS · Sify factsheets · Microsoft News · Reuters · Economic Times · Livemint · Moneycontrol · Business Standard · Indian Express · DatacenterDynamics · Invest UP / UP DC dashboard · IFC · Savills · BloombergNEF · CBRE · Vestian · SBI Sector Report.

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