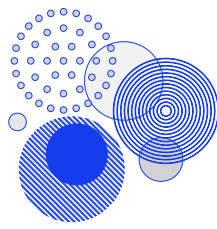


# INDIA DATACENTER MARKET OUTLOOK : A STRATEGIC PERSPECTIVE TO 2030

India's data center boom is inevitable; strategic positioning now defines leadership in 2030





India's datacentre boom: Policy tailwinds, 5G, and cloud growth to power US\$ 30 Billion investments by 2030

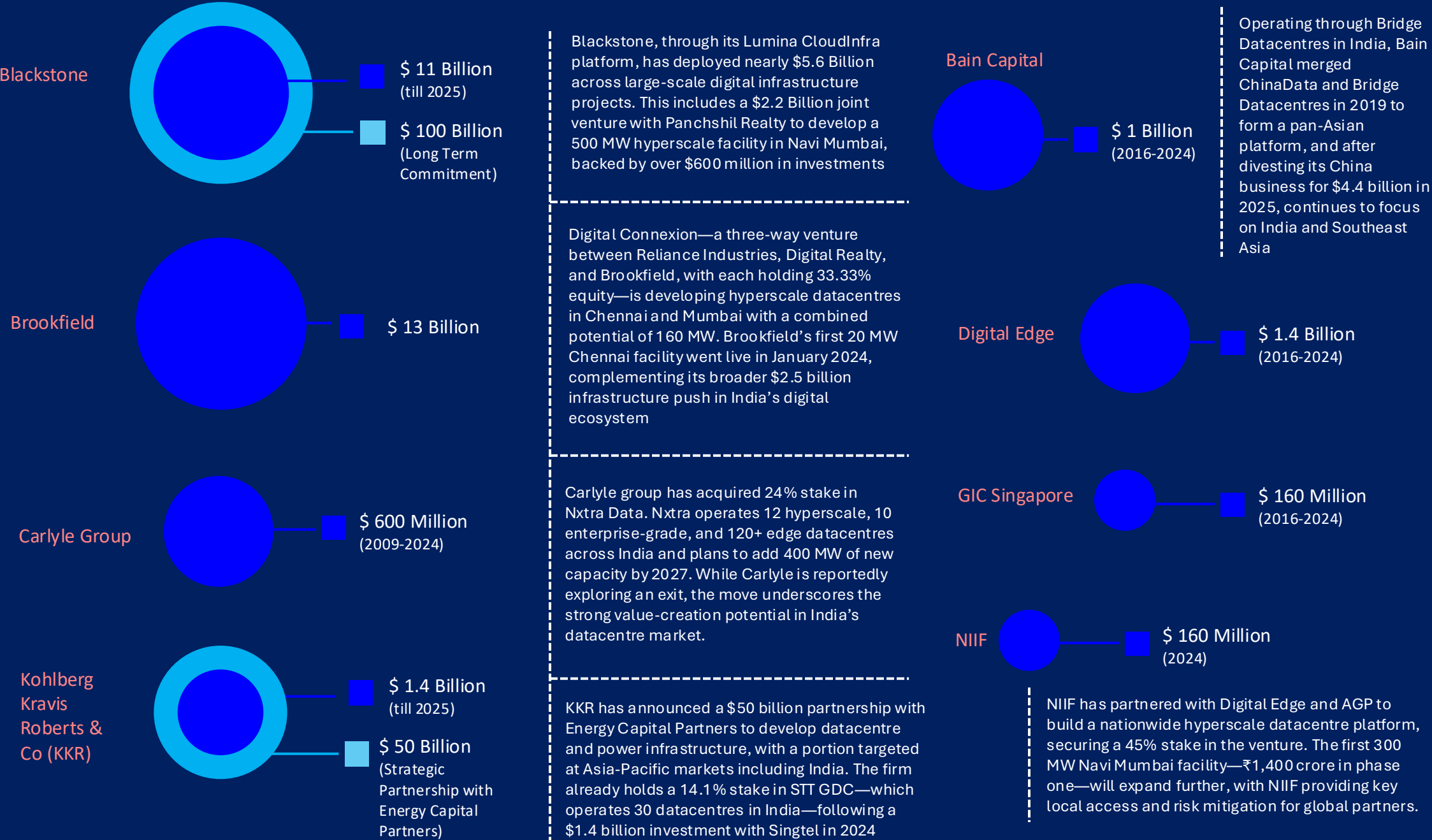
Why is India's digital infrastructure entering a new "gold rush," positioning datacentres as the most compelling high-conviction opportunity? [Unlock the Opportunity with Eninrac's Report "India Datacentre Market Outlook: A Strategic Perspective to 2030"](#)

India's datacenter industry is entering a sustained structural growth trajectory, driven by progressive policy reforms, rapid 5G proliferation, and accelerated cloud adoption. Between 2024 and 2030, anticipated investments of USD 10–12 billion are set to fundamentally reshape the ecosystem—spanning IT hardware, power infrastructure, advanced cooling systems, and large-scale construction. Growth will continue to cluster around Mumbai, NCR, Hyderabad, and Chennai, which are emerging as the country's core hyperscale hubs. Parallely, edge datacenter deployments will scale to enable latency-sensitive use cases across telecom, automotive, and urban infrastructure. Sustainability is becoming a decisive procurement criterion, with renewable energy sourcing and high-efficiency cooling architectures evolving from differentiators to baseline expectations. The industry value chain is also shifting toward software-driven and service-led operating models, unlocking higher-margin, recurring revenue pools.

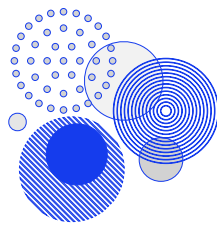
Against this backdrop, global private equity investors are sharply increasing their commitments to India's digital infrastructure sector, attracted by resilient, data-linked returns and the nation's aspiration to build a USD 1 trillion digital economy by 2030. Capital deployment is intensifying across edge facilities, AI-ready hyperscale campuses, and scalable fibre networks. Since 2020, more than USD 15 billion has already been committed and deployed, with a further USD 20–25 billion expected by decade-end. This momentum positions India as one of the fastest-growing and most strategically significant digital infrastructure markets globally.

India is on track to expand its datacentre capacity fivefold to **8 GW** by 2030, creating a **\$30-40 billion capex runway** for investors and operators

Key Private equity and institutional investors in India's datacentre market, \$ billion



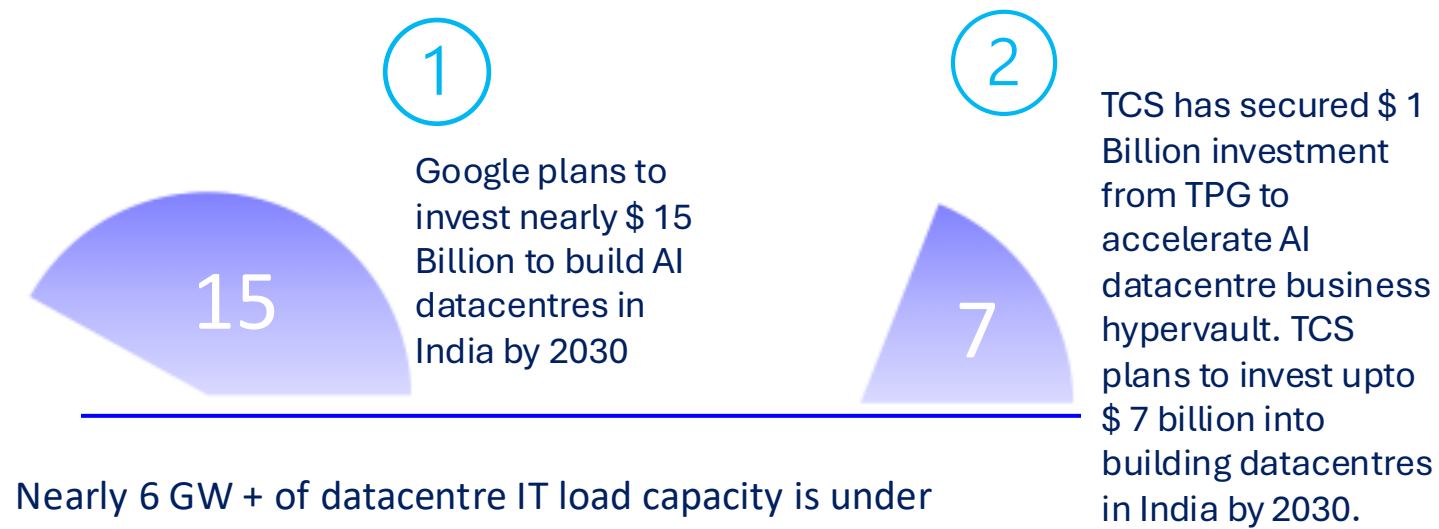
Source: eninrac consulting, Industry Research, Trade Brains



India attracted investment commitment of approx. **\$ 60.3 billion** from both domestic and international investors between 2019-2024

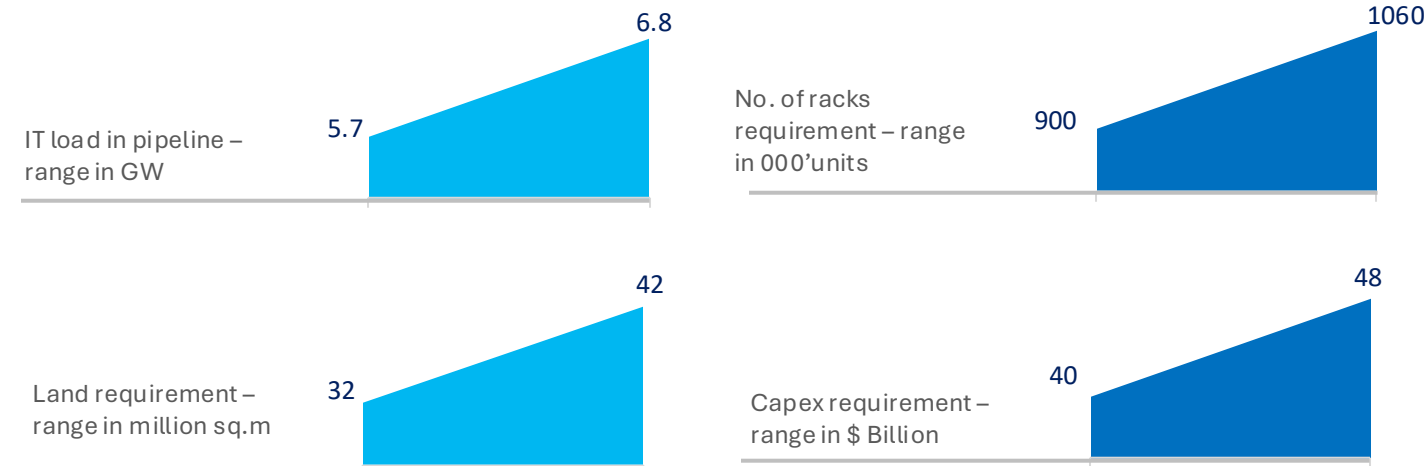
Underlying Opportunity in India’s datacentre market space, \$ Billion (B)

Investment plans rolled out by Google, Tata & AWS in India for datacentre expansion by 2030



Nearly 6 GW + of datacentre IT load capacity is under pipeline in India with the capex opportunity of over \$ 40 Billion

Opportunity track in India’s Datacentre Market



Key investment announcements for datacentres in India by prominent players



Reliance JV

Plans to develop 1GW of AI-native datacentre in across 400 acre campus in Andhra Pradesh, through Digital Connexion



Adani ConneX

planned for multi GW buildout



Sify

plans to create multi AI ready hubs and GPU infrastructure in tier-2 & tier-3 cities



Lodha Developers

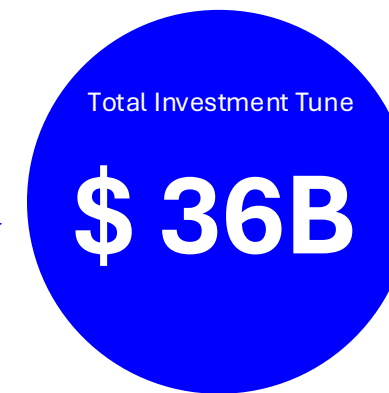
Developing a 370 acre “Green Integrated Data Centre Park” in Palava City (Mumbai Metropolitan Region)

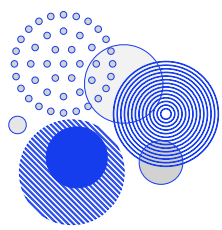


STT GDC



Anant Raj



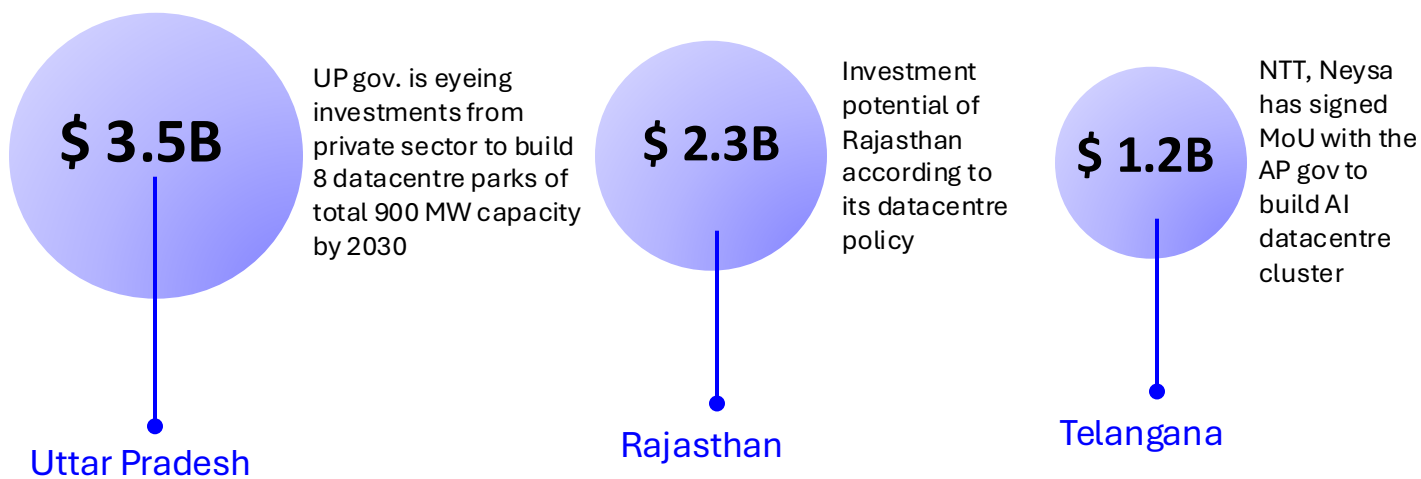


## The Opportunity Breakup

To contextualize the estimated \$20-25 billion investment requirement for the datacentres, it is important to note that this figure likely understates the full capital outlay. The estimate captures investment from only three of the five compute-power investor archetypes—builders, energizers, and technology developers/designers—who directly fund the underlying infrastructure and foundational technologies enabling datacentres at scale. Roughly 15% (~\$3.3 billion) of the investment is expected to flow to builders for land acquisition, materials, and site development. Another 25% (~\$5.6 billion) will be directed toward energizers for power generation, transmission, cooling, and electrical systems. The largest share—60% (~\$13.5 billion)—will go to technology developers and designers responsible for advanced chips and compute hardware. The remaining two archetypes—operators (hyperscalers and colocation providers) and AI architects (AI model and application developers)—also materially invest in compute capacity. However, isolating their infrastructure spending is complex in the Indian context, as much of it is embedded within broader R&D, software, and platform-development budgets. This framework is increasingly relevant for India as it accelerates AI-ready datacentre capacity, grid modernization, and semiconductor-linked capital formation.

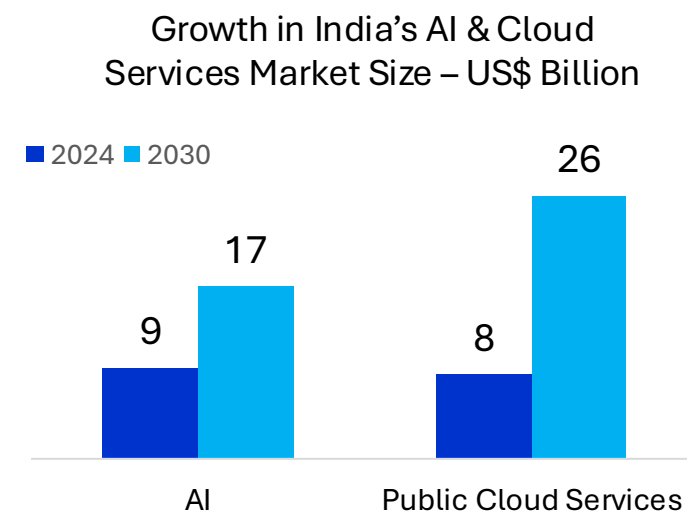
### 4 State Level Investment Centric Support

Key announcements by select few state gov.



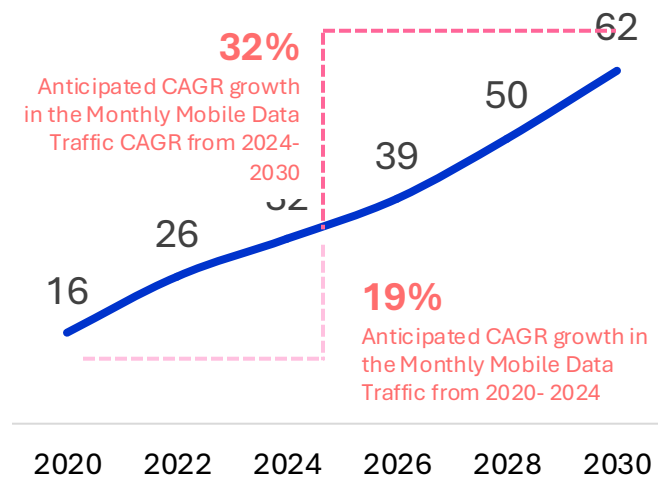
India preferred as a reshoring hub for datacenter development & scaling – What’s driving the rush ?

### 1 Increase in AI Adoption

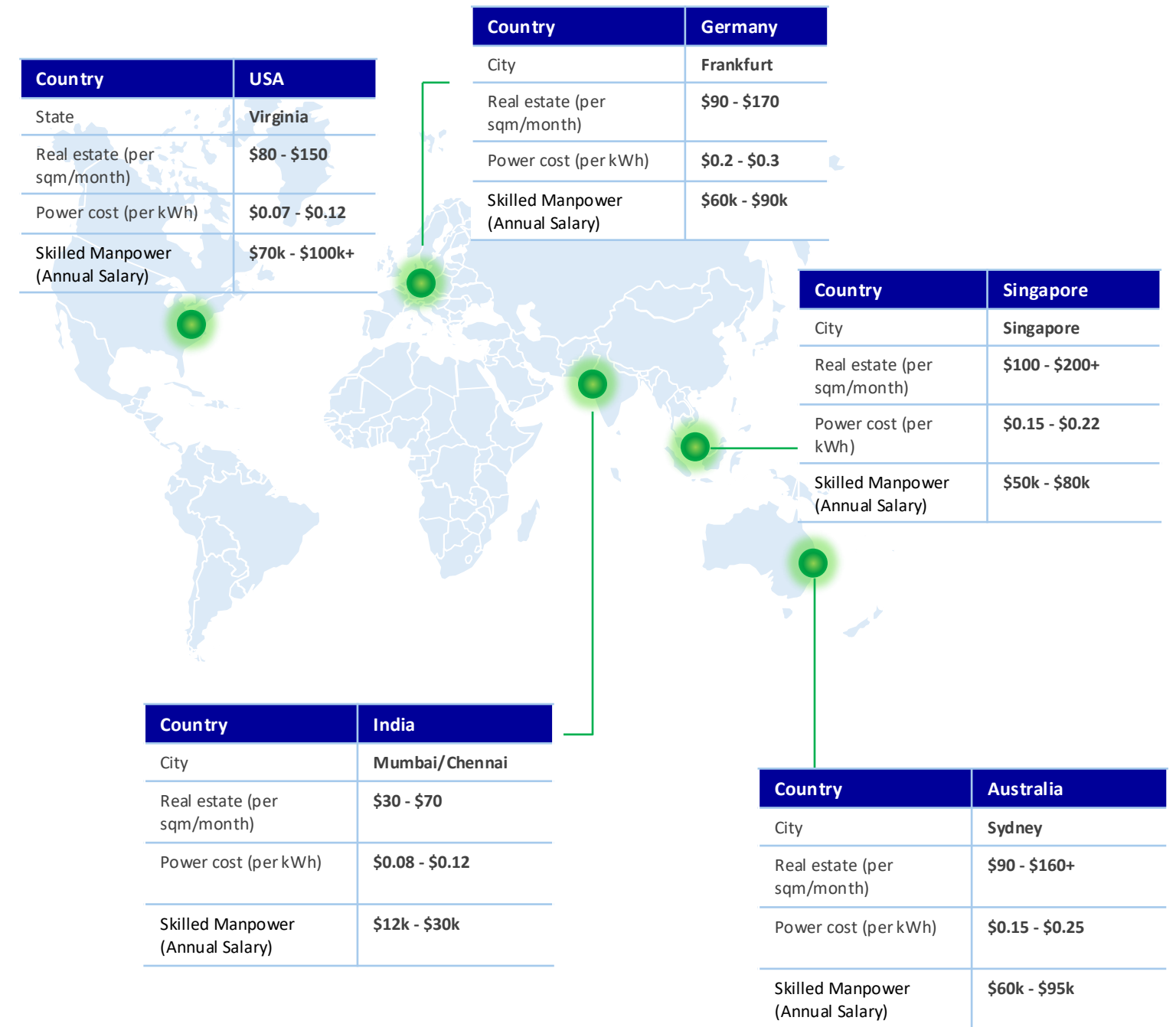


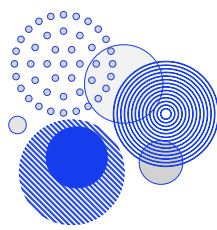
### 2 Rising Data Demand

Monthly Mobile Data Traffic (GB)  
Trajectory in India & Outlook till 2030  
per active smartphone



### 3 Cost Competitiveness





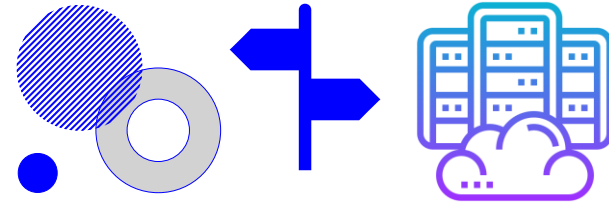
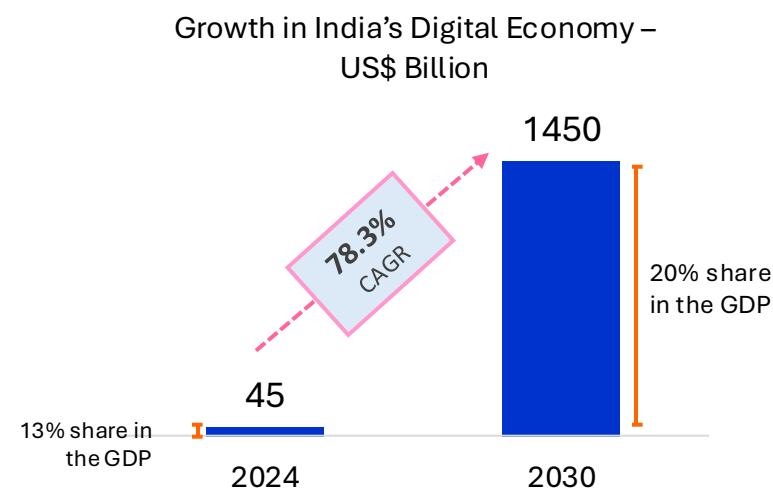
## India preferred as a reshoring hub for datacenter development & scaling – What's driving the rush ? (contd.)

5

**Network and international connectivity.** India has the potential to become a dominant player in the global submarine cable network due to its strategic geographical location. The country currently hosts around 17 international subsea cables across 14 landing stations located in Mumbai, Cochin, Tuticorin, Chennai, and Trivandrum. As of the end of 2022, the total lit capacity and activated capacity of these cables stood at 138.606 Tbps and 111.111 Tbps, respectively.

6

**Growth in India's Digital Economy.** By 2030, India's digital economy is projected to contribute nearly 1/5<sup>th</sup> of the nation's overall GDP. India is on the track to become the world's third largest economy with a projected GDP of US\$ 7.3 Trillion by 2030 (as per S&P) and the share of digital economy would around US\$ 1.46 Trillion.



## Key Signpost –Why Datacentres Will Be India's Digital Infrastructure Backbone ?

Datacentres are emerging as the core enabler of India's digital transformation, anchoring the nation's ambitions across 5G, AI, cloud computing, and Industry 4.0. Their expansion is set to drive USD 20-25 billion in investments by 2030, creating a resilient foundation for data sovereignty, service reliability, and low-carbon digital infrastructure. Development of datacentres would offer significant opportunities for the entire spectrum of the value chain, which can be seen below-

### For Power & Utilities

- Datacentre growth will catalyze demand for reliable, high-quality power infrastructure, driving investments in renewables integration, grid stability, and captive energy solutions — positioning utilities as strategic enablers of digital infrastructure

### For OEMs & Equipment Suppliers

- Accelerated capacity additions will expand opportunities for cooling systems, UPS, transformers, switchgear, and IT hardware, fostering local manufacturing and technology partnerships under the Make-in-India framework

### For ICT & Network Providers

- Datacentres will act as hubs for edge computing and 5G backhaul, creating synergies for fiber expansion, network densification, and digital connectivity upgrades nationwide.

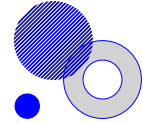
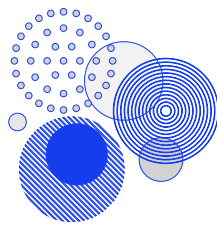
### For Real Estate & Infra Developers

- The sector will unlock a new asset class in industrial-grade digital real estate, spurring land development, urban zoning reforms, and green building innovations across key metro and emerging Tier-II clusters.

### For Construction & EPC Partners

- EPC firms will benefit from integrated design-build contracts covering civil, MEP, HVAC, and electrical works, driving specialized engineering capabilities and cross-sector project management efficiencies





## Must Buy For

- Data Centre Developers (Hyperscale, Colocation, and Edge)
- Cloud Service Providers (Global & Domestic)
- Telecom Operators & Network Infrastructure Providers
- Power Utilities & Renewable Energy Developers
- Independent Power Producers (IPPs)
- Real Estate & Infrastructure Developers
- EPC Companies for Data Centre Projects
- MEP, HVAC & Electrical Systems Integrators
- Data Centre Equipment OEMs (Cooling, UPS, Switchgear, IT Hardware)
- Fiber Network & Connectivity Providers
- Battery Storage & Energy Management Solution Providers
- Consulting & Engineering Advisory Firms (Design, Feasibility, Compliance)
- Government Agencies & Regulatory Authorities (Digital Infrastructure, Power, Urban Development)
- Investment Banks & Infrastructure Funds
- Private Equity & Venture Capital Investors in Digital Infrastructure
- Export Credit Agencies (ECAs) & Development Finance Institutions
- Technology Solution Providers (AI, Automation, and DCIM Platforms)



## Companies Mentioned

- Tata Communications Ltd
- Bharti Airtel Ltd / Nxtra Data Ltd
- CtrlS Datacenters Ltd
- NTT Global Data Centers India
- AdaniConneX
- Yotta Infrastructure (Hiranandani Group)
- STT Global Data Centres
- Web Werks India
- Sify Technologies Ltd
- Microsoft Azure
- IBM Cloud



## For Queries

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Call at: +91 93190 48963/47963 for any other queries



The life of a man consists not in seeing visions and in dreaming dreams, but in active charity and in willing service

- Henry Wadsworth Longfellow

## About Eninrac

Eninrac Consulting is a global market research and advisory firm that specializes in providing comprehensive insights and strategic solutions across various industries. Our services are designed to help businesses navigate market complexities, identify growth opportunities, and achieve sustainable success.

Eninrac's USP lies in its ability to deliver pragmatic, data-driven solutions tailored to the unique needs of each client. By maintaining close collaboration and adopting a hands-on approach, they ensure that their insights are actionable and aligned with clients' strategic objectives. This personalized guidance through diverse markets and cultures sets them apart in the consulting landscape. By leveraging the services offered, Eninrac Consulting empowers businesses to improve processes, understand customers, and solve problems effectively, thereby driving growth and maintaining a competitive edge in their respective industries.

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2025 marks our 6th anniversary as a performance leader, delivering superior research and advisory services.