US Data Center Daily Briefing

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KEY THEMES

- India crosses 283GW non-fossil, shifts to grid readiness
- MNRE calls for storage and pumped storage to firm renewables
- Avaada and Adani Green push demand via data centres and hydrogen
- Transmission and evacuation constraints flagged as renewables scale

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India is starting to talk about renewables the way data centre investors wish every market did: less about nameplate gigawatts, more about whether the electrons actually show up when needed. With 283GW of non-fossil capacity now on the books—about 54% of installed capacity—the message from New Delhi is that the next bottlenecks are the grid, storage, and domestic supply chains. The interesting twist: data centres are being cited explicitly as demand that can help make the whole system pencil out.

The Big Stories

Today's feed is essentially a single, consequential signal rather than a grab-bag of deals and build announcements: India's energy leadership is pivoting from "build renewables" to "make renewables dependable." For anyone underwriting India capacity—whether you're looking at campuses, power procurement, or supply-chain exposure—the key takeaway is that policy focus is moving to transmission and firming, not just generation.

Behind the Headlines

In India prioritises grid, storage and domestic clean supply chains, Rajesh Kulhari of India's Ministry of New and Renewable Energy says India has crossed 283GW of non-fossil capacity (roughly 54% of installed capacity) and now needs to prioritise grid readiness, storage, domestic manufacturing, and international partnerships to keep renewables reliable and affordable. That's a tacit admission that the "easy" phase—contracting and building large volumes of variable generation—has run ahead of the hard stuff: evacuation, balancing, and the industrial base that supplies it.

What matters for data centres is the way demand is being framed. Industry voices highlighted demand creation via green hydrogen and data centres, while also stressing that storage deployment—including pumped storage—has to scale, and that transmission/evacuation

must keep pace. Read plainly, India is telegraphing a shift toward the enabling layer that determines whether hyperscale-style procurement works at scale: you can sign all the clean PPAs you like, but without grid capacity and storage, you're buying volatility with a green label.

There's also a subtle industrial-policy angle investors shouldn't miss. The emphasis on domestic manufacturing and clean supply chains suggests India wants more of the value capture—equipment, components, and the jobs—rather than importing the entire stack. Add the call for international partnerships (including interest flagged by ambassadors from Georgia and Serbia) and you can see the outlines of a supply-chain-and-capital strategy: bring in know-how and partners, but build at home. For operators, the near-term watch item is simple and unglamorous: how quickly transmission and storage approvals, siting, and execution catch up to the pace of renewable additions—because that's what will set the true ceiling on "clean, firm power" for new capacity in India.

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