US Data Center Daily Briefing

December 29, 2025

KEY THEMES

- Demand reduction and progressive pricing targeting large loads
- Permitting and community opposition risks in US secondary markets
- India opens civil nuclear to private and foreign capital (up to 49% FDI)
- SMRs positioned for captive power including data centres
- Growing focus on load controls as an alternative to generation buildouts

Market overview (Global)

Today's flow skews toward **power availability and social licence** rather than large transaction volume. Two themes stand out: (i) **policy narratives shifting from "build more generation" to "reduce demand / manage load"** (notably in New York), and (ii) **new potential firm-power pathways** for data centres via **private participation in India's nuclear buildout**, alongside ongoing **local permitting pushback** in US secondary markets.

Risks and watchpoints (near-term)

- **Demand curtailment / punitive tariffs risk (US, NY focus):** Commentary advocating aggressive demand-reduction tools explicitly targets "wasteful" loads including **idle data centres and crypto mining**, proposing **steeply progressive pricing** and **load controls** as alternatives to new renewable buildouts ("We Don't Need Any More Renewables: Reduce Demand Instead"). If echoed by policymakers or regulators, this is a downside risk to **utilisation assumptions**, **power pricing**, and **curtailment exposure** for flexible/interruptible loads.
- **Permitting and community opposition risk (US Southeast):** A proposed rezoning for a data centre in **Stokes County (near Walnut Cove), North Carolina** is already drawing visible opposition ("No Data Centers" signs), creating schedule and execution risk for greenfield development (Stokes data center plan stirs economy vs. environmental debate).
- **Upside: new firm-power investability in India:** India's SHANTI Bill expands the investable universe for **baseload/firm generation** by opening civil nuclear to private participation (including **up to 49% foreign investment**) and explicitly frames **SMRs for captive industrial power including data centres**—a potential upside for colocation/captive power

strategies and long-duration power contracting (SHANTI Bill opens India's nuclear sector to private participation).

- **Execution bottlenecks (India nuclear):** While the policy signal is positive, scaling from **8.88 GW to 100 GW by 2047** implies long-dated delivery risk and a need for governance clarity (the story notes calls for an **independent guidance body** and **SMR pilot clusters**) (SHANTI Bill opens India's nuclear sector to private participation).

Key deals and projects (development pipeline / siting)

North Carolina: Stokes County rezoning proposal

- A developer has proposed rezoning land **northeast of Walnut Cove in Stokes County** for a data centre, triggering a debate pitting **economic development** against **environmental concerns** (Stokes data center plan stirs economy vs. environmental debate).
- Site context: the proposed location is **near Duke Energy's Belews Creek Steam Station**, which may be relevant to perceived power proximity and local stakeholder concerns (Stokes data center plan stirs economy vs. environmental debate).
- Identifiers cited: **Stokes GIS PINs 6964918321 and 6973734188** (Stokes data center plan stirs economy vs. environmental debate).

Power and grid / interconnection highlights

Load management narrative intensifies (New York as example)

- An opinion piece argues New York can meet a **70% renewable target by 2030** without increasing generation by instead reducing demand through:
  - **Universal weatherization**
  - **Load controls**
  - **Steeply progressive pricing** with a **10–15 kWh/day baseline**
  - Targeting "wasteful uses" including **crypto mining** and **idle data centres** (We Don't Need Any More Renewables: Reduce Demand Instead).
- Investor read-through: while not policy, the framing highlights reputational and political risk that may translate into **rate design changes**, **load caps**, or **operational constraints** in constrained grids.

India: nuclear as potential firm-power solution for data centres

- India's SHANTI Bill signals a pathway to materially expand firm generation, with national ambition to grow nuclear capacity from **8.88 GW to 100 GW by 2047** and to allow private

participation with **up to 49% foreign investment** (SHANTI Bill opens India's nuclear sector to private participation).

- Engineering perspective highlighted: **Tata Consulting Engineers** advocates **SMRs** (including **Bharat Small Reactor** and proposed modular **50/100/200 MW** designs, plus modularising **220 MW PHWR**) for grid support and **captive industrial power (including data centres)** (SHANTI Bill opens India's nuclear sector to private participation).

Policy and regulation

India: SHANTI Bill—private and foreign capital access

- India's Parliament passed the **SHANTI Bill**, opening civil nuclear to private participation and allowing **up to 49% foreign investment** (SHANTI Bill opens India's nuclear sector to private participation).
- The story notes calls for an **independent guidance body** and **SMR pilot clusters**, implying forthcoming secondary policy design that will matter for bankability and timelines (SHANTI Bill opens India's nuclear sector to private participation).

US/local: land use and permitting pressures

- The Stokes County proposal illustrates that **rezoning/permitting** remains a key gating item, with early, visible community opposition despite proximity to established energy infrastructure (Stokes data center plan stirs economy vs. environmental debate).

What to watch

- Whether demand-reduction narratives (e.g., **progressive pricing, load controls**) translate into **formal policy proposals** that could affect data centre operating economics in constrained markets (We Don't Need Any More Renewables: Reduce Demand Instead).
- Progress (or pushback) on **Stokes County rezoning** and whether opposition becomes a template for other US secondary markets (Stokes data center plan stirs economy vs. environmental debate).
- How India operationalises SHANTI Bill provisions: approval pathways, governance, and structuring for **private/foreign investment up to 49%** (SHANTI Bill opens India's nuclear sector to private participation).
- Early movement toward **SMR pilot clusters** and whether "captive power for data centres" becomes a concrete procurement pathway (SHANTI Bill opens India's nuclear sector to private participation).

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