



India's Data Centre Revolution

The Integrated Lifecycle
Blueprint (2026–2030)



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Executive summary: The shift to a lifecycle partner model

India is in a midst of a fast-changing digital infrastructure storm and is experiencing an exponential shift, propelled by new regulatory requirements for data localisation, which are leading to a rapid growth in AI-driven workloads, and the widespread adoption of 5G technology. These forces have forced the industry to change direction; moving away from gradual progress and into a period of accelerated expansion.

Right now, the biggest roadblock to scaling up is not a lack of demand; It is the sheer complexity of meeting the demand. The industry is currently using fragmented service providers who work in silos across the data centre space be it construction, technology, or cooling. The market needs a true '**Lifecycle Partner**'. We need to offer a seamless service that covers everything from planning and building to deploying, operationalizing, and maintaining. We also need to adapt to high-value areas like Capital Markets, Telecom, Digital Transformation, and ESG frameworks to become a global force in the coming years.

Feature 	Traditional Service Model 	Integrated Lifecycle Partner 
Structure	Fragmented providers in operational silos.	A single, seamless service continuum.
Accountability	Multiple vendors leading to unclear responsibilities.	A single partner managing every phase for clear accountability.
AI Readiness	Relies on legacy air-cooling unsuited for graphics processing unit (GPUs).	Specialized liquid cooling and high-density power frameworks.
Compliance	Organizations struggle with digital personal data protection (DPDP) Act and procurement norms.	Dedicated Government Practice acting as a "sherpa" for faster deployment.
Capital Access	International investors hit a "wall" of opaque local laws.	JV Advisory arm to de-risk entry and secure clean land.



The Integrated Workflow

The shift moves away from gradual progress toward an accelerated, transformative expansion. By blending engineering, regulatory mastery, and financial structuring, the lifecycle model captures the "once-in-a-generation" opportunity in India's data economy.



The Core Framework: Fixing Four Big Market Gaps

Exponential growth naturally brings exponential complexity. Incumbents are completely missing four critical delivery risks, leaving a lot of money on the table. Our Integrated Lifecycle Partner model is built specifically to solve them.

The Integration Gap: Companies often struggle to coordinate multiple service providers, which causes delays and muddy responsibilities. **The Fix:** We step in as a single partner managing every single phase of the data centre lifecycle to streamline operations with clear accountability.

1

The Sovereign Cloud Gap: Government entities and PSUs often get tangled up in the complex procurement rules of the GeM portal and MeitY empanelment. **The Fix:** We run a dedicated Government Practice. Think of us as a sherpa, guiding clients through the bureaucracy and speeding up sovereign deployments.

3

The AI Readiness Gap: Older Indian facilities still rely on legacy air-cooling designs that simply cannot handle the intense heat of modern GPU clusters. Moving away from standard raised floors toward advanced cooling and new power sourcing is not just an engineering headache; it is a massive multi-stakeholder delivery risk. **The Fix:** We bring in a specialized AI infrastructure practice focused purely on liquid cooling and high-density power distribution.

2

The Capital Efficiency Gap: International investors want to enter India, but they often hit a brick wall of confusing land acquisition laws and state-level power regulations. **The Fix:** Our Capital Markets & JV Advisory arm steps in to secure clean land parcels, structure Power Purchase Agreements (PPAs), and totally de-risk market entry.

4

Navigating Complexity: How Regulation and ESG Impact Clients

Regulations often look like a burden, but they can act as a massive competitive advantage. Navigating these rules helps us differentiate our business and create ongoing advisory opportunities

Accelerating Time-to-Market



The Digital Personal Data Protection (DPDP) Act 2023 completely changes how companies process and store data. It limits cross-border transfers and forces global enterprises to set up a physical data residency footprint in India. We help clients move faster by running extensive "Data Residency Impact Assessments" and designing compliant architectures right from the start.

Monetizing Bureaucracy



The government offers great fiscal incentives, like waiving electricity and stamp duties. But cashing in on these benefits means fighting through complex bureaucratic red tape. We manage this multi-nodal process for our clients to improve their operating efficiency.

Unlocking Capital with ESG



Data centres use a ton of energy, so meeting international sustainability standards is crucial. By focusing on efficient power usage and locking down renewable energy agreements, operators align with global ESG expectations. This makes them much more attractive to investors. Plus, India allows 100% Foreign Direct Investment (FDI) under the automatic route for data centres, which lets offshore capital flow smoothly into onshore operations.

The Baseline: Massive Demand and Policy Tailwinds

India's digital appetite is huge, backed by favourable government policies and a stable economy. With one billion internet users and businesses rushing to the cloud, building domestic data centres is now a necessity.

Total sector revenue is on track to hit an estimated USD 45.69 billion by 2033 (India Data Center Market Size & Outlook, 2033 , Grand view horizon). If you look just at AI-specific infrastructure, that niche market was worth about USD 588.6 million in 2024. We expect it to skyrocket to USD 3.55 billion by 2030, growing at a massive 35.1% CAGR (India Artificial Intelligence (AI) Optimised Data Center Market Report 2030, Mordor Intelligence). Add in aggressive tax holidays under Section 80-IA and Production-Linked Incentive (PLI) schemes for domestic component manufacturing, and the financial upside is incredible (UNION BUDGET 2026-27: PIB).



The Way Forward

The window to dominate the Indian data centre market is wide open right now, but it will not stay that way forever. By 2030, the big players are expected consolidate the market. They already know that simply offering raw real estate is not enough anymore. The future belongs to integrated partners who can effortlessly combine complex physical engineering, specialized AI readiness, regulatory mastery, and financial structuring into one cohesive lifecycle partnership.



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