

J.P. MORGAN INDIA CONFERENCE

Powering India's next phase of growth

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22 September, 2026



Disclaimer



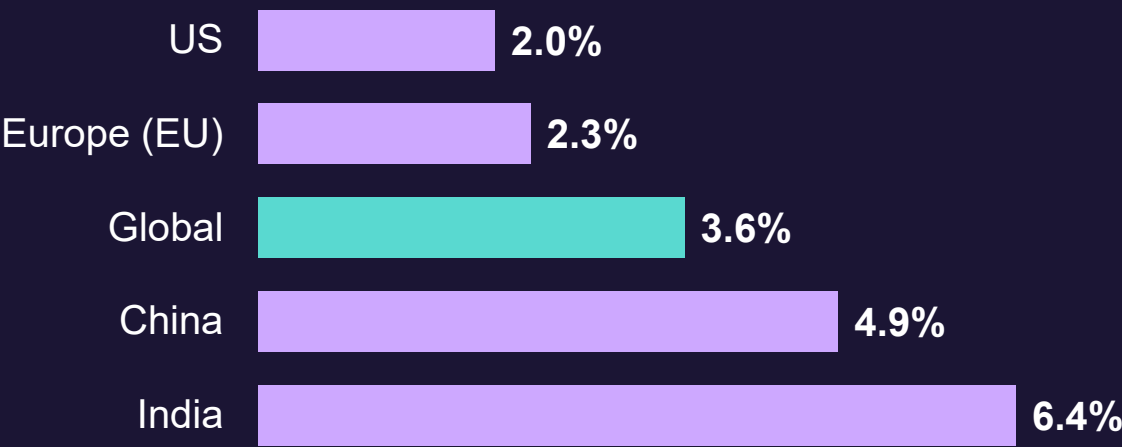
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Electricity is becoming the backbone of economic growth globally

Electricity-demand growth

Average annual growth, 2026–2030



Electricity’s share of final energy

21% → 24%

2025

2030 forecast

-  Electrification, Decarbonization
-  AI, Digitalization
-  Energy Security, Independence

Demand is outpacing overall electricity growth, Grids becoming a bottleneck

Sources: IEA Electricity 2026; Internal Analysis

India's power demand is growing sharply while moving to a renewable supply mix

PEAK DEMAND

271 → 459 GW

Today → 2035–36



Economy, domestic consumption

Continued GDP growth, consumption expansion



Industrialisation

Reliable, high-quality industrial loads



Urbanisation + cooling

Sharper peaks and seasonal demand



Railways, EVs + electrification

Wider dependence on electricity



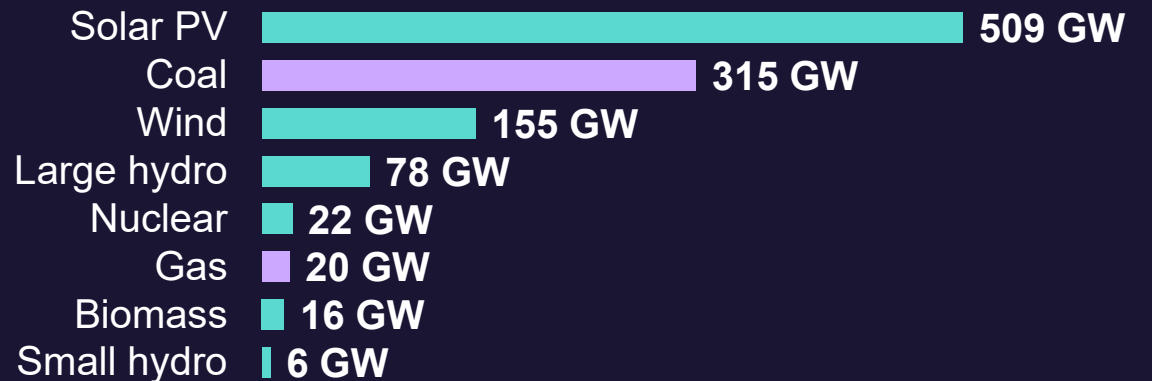
Data centres + AI

Concentrated, high-availability power

GENERATION CAPACITY

1,121 GW

By 2035–36 | Today: 552 GW



786 GW non-fossil generation
[+] + 174 GW / 888 GWh storage

Electricity availability and reliability demands greater and faster grid investment

INDIA | GRID READINESS REQUIREMENTS BY 2035-36

~ 2× growth

830 GVA+ add transformation
achieving 2,300+ GVA

54% → ~70%

Non-fossil share growth -
more grid stabilization

USD 250 - 300 bn

Estimated investment required for grid
expansion, stabilization, storage

WAY FORWARD | STRATEGIC PRIORITIES

 **Expand**

High-Voltage
substations, HVDC

 **Modernize**

Upgrade outdated
assets

 **Stabilise**

Statcom, Syncon,
Storage

 **Digitalize**

Digital substations,
Asset Management, AI

Enabling India's energy future across the entire energy value chain

100+ years

of presence and commitment to India

> 300 million USD

Capex investment committed for
Manufacturing capacity expansion

Local for Global

Global Hub - Make in India for India
and for the World



Low-emission Generation

Highly efficient gas-fired power
generation and lifecycle services



Power Transmission

HVDC VSC, High Voltage equipment,
solutions, grid stabilization, services



Industrial Decarbonization

Industrial electrification, energy
efficiency, green hydrogen

Thank you

Powering India's growth towards Viksit Bharat

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