West Asia war is a warning. It's also a window to securing our energy

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The ongoing turbulence in West Asia is a stark reminder of a structural reality that India has long grappled with: energy insecurity is not episodic, it is systemic. For a country that imports over 85 percent of its crude oil, geopolitical volatility is not an external risk. It is a domestic economic vulnerability.

Every disruption in supply chains, every spike in oil prices, and every escalation in regional conflict transmits directly into inflation, fiscal pressure, and current account stress. But crises of this nature also present a huge opportunity. India has the scale, the policy momentum, and the entrepreneurial capacity to convert this vulnerability into a decisive strategic advantage.

The present challenge must be used not merely to respond to an energy shock, but to permanently redesign India's energy architecture.

First, India must dramatically accelerate its renewable energy ambition and move from incrementalism to scale.

India's existing target of 500 GW of renewable energy by 2030 was bold when announced. Today, it is no longer sufficient. A revised target of 1500 GW by 2030 is both necessary and achievable. This is about both, climate commitments, as well as energy sovereignty. In 2025, China added almost 1600GW in clean energy (solar and wind), whereas India, which is far more climatically blessed, added a mere 49GW. It is important to note that solar will overtake generation capacity of all other sources and in the next four decades shall overtake gas and coal.

To enable this increased target, procurement mechanisms must be fundamentally strengthened. Central agencies must aggregate and contract at least 200 GW+ annually, complemented by aggressive state-level procurement. Renewable Purchase Obligations and Renewable Consumption Obligations must be expanded and strictly enforced.

Grid infrastructure, therefore, must be treated as a national priority. Renewable-rich states such as Gujarat, Rajasthan, Karnataka, and Tamil Nadu require high-capacity transmission corridors that are seamlessly integrated with storage systems. Renewable Energy Management Centres must be expanded in both number and capability to manage

intermittency at scale. Last year, over 50GW of energy capacity remained stranded due to lack of evacuation and it is expected that over 35GW will be curtailed this year.

Equally critical is storage. Battery energy storage systems and pumped hydro storage must be deployed in mission mode. Every renewable tender going forward must mandate storage integration to ensure round-the-clock clean power. Storage should be classified as a core renewable asset and the GST should be brought down to the appropriate bracket.

Second, India must fundamentally rethink energy consumption at the household level through rapid electrification of cooking.

Liquefied petroleum gas has played a transformative role in improving health outcomes and reducing indoor pollution. But it remains import-dependent. Electric induction cooking offers a pathway to shift household energy consumption towards domestically generated clean power.

This transition requires scale and strategy. Prices of induction cooktops can be reduced through demand aggregation, replicating the success of the UJALA programme. The existing database of Ujjwala beneficiaries provides a ready platform for targeted distribution.

More importantly, this transition must be linked to distributed renewable generation. Time-of-day tariffs, coupled with storage-backed renewable supply, can ensure reliable and affordable power for households. Electrification of cooking is not just a consumer shift. It is a structural demand driver for clean energy.

Third, India must go all out on transport electrification as a national economic strategy.

Transport accounts for a significant share of oil consumption. Electrification is therefore central to reducing import dependence. India must announce a clear and time-bound roadmap: full electrification of new two-wheelers and three-wheelers by 2030, buses in the near term, and cars and trucks by 2035.

However, electrification cannot succeed without fixing the battery ecosystem. The Production Linked Incentive scheme for Advanced Chemistry Cells has not succeeded and must be urgently restructured. Underperformance must be addressed, timelines rationalised, and credible global and domestic players brought in. Domestic value addition thresholds must be pragmatic and aligned with industry realities.

Charging infrastructure is critical and must be scaled rapidly across urban and highway networks. This requires coordination across central, state, and municipal levels, supported by clear standards and viable business models.

Fourth, nuclear energy must be scaled as a stable, long-term backbone of India's energy mix.

Renewables and storage will form the bulk of future capacity. But nuclear power provides the firm, non-intermittent supply that is essential for grid stability. India's ambition to reach 100 GW of nuclear capacity by 2047 is both strategic and necessary.

Small modular reactors offer a scalable pathway. With the enabling policy now already in existence, the immediate priority must be to operationalise the reforms by bidding out initial projects and creating a predictable pipeline. Private sector participation, global partnerships, and streamlined regulatory processes will be critical. Specific time bound targets must be aligned for private sector bidding by the Nuclear Power Corporation.

Fifth, India must build end-to-end capabilities in critical minerals, moving decisively from dependence to self-reliance.

The challenge is not access to raw materials alone, but processing and refining. Today, global supply chains are heavily concentrated, creating strategic vulnerabilities. India must develop domestic processing capabilities at scale. This will be key towards energy self-sufficiency - both on the storage front, as well as on the rollout of EVs.

This requires assured offtake mechanisms, price support frameworks, and long-term contracts to provide certainty to investors. Strategic partnerships with resource-rich countries must be deepened, not just for extraction but for integrated value chains.

Equally important is human capital. Specialised training programmes through leading institutions must build a pipeline of skilled professionals in mineral processing, battery chemistry, and advanced manufacturing.

Sixth, and this is where India's current discourse remains underdeveloped, the country must position itself as a global clean energy manufacturing hub.

Energy transition is not only about deployment. It is about industrial leadership. Solar modules, batteries, electrolysers, power electronics, grid technologies and green hydrogen represent the next wave of global manufacturing.

India must leverage its scale, policy incentives, and domestic demand to attract and build world-class manufacturing ecosystems. Production Linked Incentives must be aligned across sectors, logistics costs reduced, and export competitiveness enhanced.

This is an opportunity to replicate the success seen in sectors such as digital services and pharmaceuticals, but at a far larger economic scale. These are cutting edge areas of growth and will enable India to technologically pole vault.

Seventh, financing the transition must be treated as a core strategic priority.

Traditional financing mechanisms will not suffice. India must deepen its green finance ecosystem, including green bonds, blended finance structures, and sovereign-backed risk mitigation instruments. India's renewable sector has attracted private capital from across the world. This was feasible on account of predictable and consistent policies and actions through the Solar Energy Corporation of India (SECI). This policy framework enabled capital and technology to flow into India. Similar policy frameworks are necessary across sectors to enable the private sector to attract capital and technology.

Domestic financial institutions must be incentivised to lend to clean energy projects. Similarly, multilateral development banks and global climate funds must be leveraged more effectively. Carbon markets, both compliance and voluntary, can play a catalytic role if designed with integrity and scale.

Finally, execution must be anchored in institutional coordination and accountability.

India has demonstrated its ability to deliver at scale, whether through digital public infrastructure, financial inclusion, or renewable deployment. The energy transition now requires a similar whole-of-government approach. Clear targets, defined responsibilities, and real-time monitoring must be embedded across ministries and states. Policy stability and regulatory certainty will be essential to sustain investor confidence.

The turbulence in West Asia is a warning. But it is also a window.

India stands at a pivotal moment where it can decisively break free from fossil fuel dependence, strengthen its economic resilience, and emerge as a global leader in the clean energy transition. This off ramp from fossil fuels to clean energy (wind, solar, offshore and storage) is the big quantum jump which India must undertake.

The choices made today will determine whether India remains vulnerable to external shocks or becomes a nation that shapes its own energy destiny.

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