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**EDITORIAL ANALYSIS**

# Philippines Energy Emergency — Lessons for India's Power Security

 MINT

26 March 2026

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# Philippines Energy Emergency – Lessons for India's Power Security

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### INTERVIEW ANGLE

"India's power demand is growing at 6-7% annually. What structural reforms are needed to ensure energy security while meeting climate commitments?"

### WHY IN NEWS

Philippine President Ferdinand Marcos Jr. declared a national energy emergency on March 25 after the Strait of Hormuz disruption caused LNG prices to spike 40%, threatening blackouts across Luzon. The declaration gives the government emergency powers to commandeer power plants and suspend environmental clearances for emergency generation.

## The Editorial Argument

Mint's editorial uses the Philippines' energy emergency as a warning for India. While India's energy mix is more diversified than the Philippines', the editorial argues that India's growing LNG dependence (for city gas, fertiliser, and industrial use) creates a vulnerability similar to what Manila now faces. The answer is not energy autarky but strategic diversification and storage.

## Philippines Energy Crisis – Key Facts

METRIC	DATA
Philippines LNG import dependence	~25% of electricity from gas; nearly all imported
LNG price spike (post-Hormuz)	+40% in spot markets
Emergency declaration	March 25, 2026 by President Marcos Jr.
Emergency powers	Commandeer power plants; suspend environmental clearances
Most affected	Luzon island (Manila, Quezon City – 55 million people)

## India's Energy Mix — Current Status

SOURCE	SHARE OF INSTALLED CAPACITY (2026)	SHARE OF ELECTRICITY GENERATED
Coal	~49%	~73% (still dominant in generation)
Renewable (solar + wind)	~35%	~12-14% (capacity factor lower)
Gas	~6%	~3-4%
Nuclear	~2%	~3%
Large hydro	~8%	~8-10%

India's total installed power capacity has crossed **440 GW** (2026), with renewable capacity exceeding 190 GW.

## India's Gas Vulnerability

While India is less LNG-dependent than the Philippines for electricity, its **gas dependency is growing in other sectors:**

SECTOR	GAS DEPENDENCY
City Gas Distribution (CGD)	CNG vehicles + piped natural gas (PNG) for cooking — 30 million+ domestic connections
Fertiliser	~80% of urea production uses natural gas as feedstock
Petrochemicals	Naphtha cracking and gas-based ethylene
Steel	Direct Reduced Iron (DRI) plants use gas
Refineries	Hydrogen production via steam methane reforming

India imported ~35 billion cubic metres (BCM) of LNG in 2025-26, with Qatar supplying ~45% of India's LNG imports. The Ras Laffan attack directly threatens this supply.

## Strategic Response — What India Has Done

- 1 Long-term LNG contracts:** GAIL and Petronet LNG have 20-year contracts with Qatar, Australia, and the US — insulating India from spot price spikes to some extent
- 2 Domestic gas production push:** KG-D6 (Reliance-BP) has ramped up to 30 MMSCMD; ONGC KG-DWN-98/2 adding 12-15 MMSCMD
- 3 Renewable acceleration:** 500 GW renewable target by 2030 reduces structural fossil fuel dependence

- ④ **Coal buffer:** India has ~40 days of coal stock at power plants (buffer against gas shortfalls)

## What India Should Do Next

- ① **Gas storage:** India has no strategic gas storage infrastructure (unlike the US and EU which maintain underground gas reserves). Build strategic LNG storage at Dabhol, Ennore, and Mundra terminals
- ② **Diversify LNG sources:** Increase imports from Mozambique (Total's Afungi LNG) and East Africa; reduce Qatar dependency below 30%
- ③ **Green hydrogen for fertiliser:** Replace natural gas feedstock in urea plants with green hydrogen — aligns with National Green Hydrogen Mission (Rs 19,744 crore)
- ④ **Floating Storage and Regasification Units (FSRUs):** Deploy mobile LNG receiving infrastructure at 3-4 coastal locations for emergency supply

## The Climate-Security Nexus

The editorial concludes that energy security and climate action are not competing objectives — they converge. Every gigawatt of renewable capacity reduces import dependency. Every green hydrogen plant displaces imported gas. India's 500 GW renewable target is not just a climate commitment — it is a national security strategy.

### UPSC RELEVANCE

India's energy mix percentages, LNG import sources, GAIL, Petronet LNG, KG-D6, National Green Hydrogen Mission

*Energy security — diversification strategy; LNG dependency; renewable transition as security policy; India's power sector challenges*

## ★ FACTS CORNER — KNOWLEDGEPEDIA

### INDIA'S ENERGY PROFILE:

Total installed capacity: 440+ GW (2026)

Coal: ~49% capacity, ~73% generation; Renewables: ~35% capacity, ~12-14% generation

LNG imports: ~35 BCM/year; Qatar's share: ~45%

Domestic gas production: ~90 MMSCMD (KG-D6 + ONGC + others)

City gas connections: 30 million+ domestic PNG; 60+ lakh CNG vehicles

### PHILIPPINES ENERGY EMERGENCY:

Declared: March 25, 2026 by President Marcos Jr.

Trigger: LNG price spike (+40%) after Hormuz disruption

Emergency powers: Commandeer plants, suspend environmental clearances

Luzon island most affected: 55 million people

### LNG INFRASTRUCTURE (INDIA):

Petronet LNG Dahej (Gujarat): India's largest LNG terminal; 17.5 MMTPA capacity

Petronet LNG Kochi (Kerala): 5 MMTPA

Dabhol (Maharashtra): 5 MMTPA

Ennore (Tamil Nadu): 5 MMTPA

Total LNG regasification: ~47 MMTPA

### OTHER RELEVANT FACTS:

National Green Hydrogen Mission: Rs 19,744 crore; target 5 MMT by 2030

India's renewable target: 500 GW by 2030; 50% non-fossil capacity

KG-D6 (Reliance-BP): Ramped up to 30 MMSCMD from near-zero in 2020

GAIL: India's largest gas transmission company; 14,500 km pipeline network

Gas pricing: APM gas at \$6.5/MMBtu; market-determined for new discoveries

Sources: [Mint](#), [Ministry of Petroleum](#), [PPAC](#)



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