

immersion INDIA®

FIELD NOTES · SHEET 12

Between Coal and Solar

India's Climate Balancing Act

CLIMATE & JUST TRANSITION · BELÉM COP30 · DOMESTIC GRID

Solar and wind on the same site at sunset. India built this faster than anyone expected; the problem is what runs after dark.

>50%
of installed capacity
non-fossil — target met 5 years early

74%
of electricity generated
still from coal, 2025

22%
of energy consumption
is electricity at all

80 GW
of new coal approved
to be added by 2032

> India hit its clean energy target five years early: more than half of installed capacity is non-fossil. In the same year, coal generated nearly three-quarters of the electricity that actually flowed.

Installed capacity is not generation. Solar and wind produce when the sun shines; coal runs around the clock. That is why fifty percent built clean and twenty-six percent generated clean sit side by side, and why storage is the binding constraint.

Abroad, India is the most consistent voice for equity in climate talks. At home, just-transition planning for coal districts remains thin, and the nearer exposure is adaptation: heat, erratic monsoons, water stress.

THE SIGNAL TO WATCH Coal's share of generation, not of capacity. It has barely moved.

Make India your classroom

A field guide for global executive education. Turn over for the site visits, the questions for the room and what we run.

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BENGALURU, KARNATAKA, INDIA

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Bring the cohort to the case.

Every sheet in this series is a place you can stand in. The dark store, the fab, the swap kiosk, the mandi, the GCC floor — all of them within a day of Bengaluru, and all of them take visitors.

Field Notes is a series on the forces shaping India now, designed to give decision-makers exploring India the right perspective before they commit to it. Each one takes a single force, gives you the argument and the four numbers that anchor it, and names the places in India where you can go and stand in front of it. The series is drawn from *The India That Is Unique*, Immersion India's field guide for global executive education.

ON THE GROUND — CLIMATE & JUST TRANSITION

A solar park and a coal town
Both within a day's drive of each other.

A grid control room
What happens at seven when the solar drops off.

A district heat action plan
Adaptation as it is actually administered.

THREE QUESTIONS FOR THE ROOM

01 India argues for a globally funded just transition abroad while its own coal-region planning stays underdeveloped. Is that hypocrisy, sequencing, or negotiation?

02 The newer domestic critique says just transition must also protect communities displaced by solar parks and transmission corridors. Does that widen the concept usefully or dilute it?

03 India's carbon market uses emissions-intensity targets, not an absolute cap. Model what that permits over a decade of 6% growth.

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