

DAILY NEWSP APER ANALYSIS

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**CHANAKYA IAS ACADEMY
SECTOR 25 CHANDIGARH**

Manufacturing, capital goods lift IIP growth to 5.2% in Feb.

The Hindu Bureau
NEW DELHI

Growth in India's industrial activity accelerated marginally to 5.2% in February, driven by a quickening of growth in the manufacturing and capital goods sectors, data released by the Centre on Monday showed.

The data on the Index of Industrial Production for February, released by the Ministry of Statistics and Programme Implementation, shows that the final growth for January was also upgraded to 5.1% from the provisional 4.8% stated

as part of last month's data release.

Within the Index, growth in the manufacturing sector accelerated to 6% in February, from 5.3% in the previous month. This was also considerably faster than the 2.8% in growth in February last year. The mining and quarrying sector, on the other hand, saw growth slowing to a four-month low of 3.1% in February 2026, down from 4.3% in January. This was, however, faster than the 1.6% seen in February 2025.

Growth in the electricity sector, too, slowed to 2.3%

Industrial uptick

The chart shows month-wise IIP growth rates (in %)



in February 2026 from 5.1% in January.

"The growth is investment-led, with basic metals, automobiles, machinery, and double digit gains in capital goods and infrastructure/construction goods pointing to a capex and infrastructure driven

upcycle," Rajeev Sharan, Head of Research at Brickwork Ratings said.

Notably, growth in the capital goods sector accelerated to a nine-month high of 12.5% in February 2026 from 4.1% in the previous month. This performance on the back of a relatively strong performance of 8.1% in February of last year.

Consumer demand, however, seems to have slumped, according to the data. The consumer durables sector contracted 2.1% in February 2026, the sector's worst performance in 27 months. The consumer

non-durables sector, too, contracted 0.6%, the second consecutive month of contraction.

"Overall, the data confirms that investment linked sectors are anchoring growth, while softer consumer non durables and modest mining and electricity gains highlight areas where the recovery is still incomplete," Mr. Sharan said. "From a credit rating perspective, sustained manufacturing and investment momentum support credit strength, though uneven demand means fundamentals are still evolving."

KEY HIGHLIGHTS

Context of the News

- The Ministry of Statistics and Programme Implementation released the latest Index of Industrial Production (IIP) data.
- India's industrial growth accelerated to 5.2% in February 2026, compared to previous months.
- January 2026 growth was revised upward to 5.1% (from 4.8%), indicating stronger-than-estimated industrial recovery.
- Growth is primarily investment-led, with strong performance in manufacturing and capital goods sectors.
- However, weak consumer demand persists, reflected in contraction in consumer goods segments.

Key Points

- Overall IIP Growth February 2026: 5.2%
- January 2026 (revised): 5.1%
- Sector-wise Performance Manufacturing:
 - Growth rose to 6% (Feb 2026) from 5.3% (Jan)
 - Much higher than 2.8% in Feb 2025
- Mining & Quarrying:
 - Slowed to 3.1% (4-month low)
- Electricity:
 - Declined to 2.3% from 5.1%
- Use-Based Classification Capital Goods:
 - Sharp rise to 12.5% (9-month high) → indicates strong investment cycle
- Infrastructure/Construction Goods:
 - Robust growth, signalling infrastructure push
- Consumer Durables:
 - Contracted -2.1% (worst in 27 months)
- Consumer Non-Durables:
 - Contracted -0.6% (second consecutive decline)
- Growth Pattern Investment-driven growth (Capex-led)
- Weak consumption demand recovery

Static Linkages

- IIP is a composite indicator measuring short-term changes in industrial output.
- Base Year: 2011-12 (as per MOSPI).
- Three sectors in IIP:
 - Manufacturing (highest weight ~77%)
 - Mining
 - Electricity
- Use-based classification:
 - Primary goods, Capital goods, Intermediate goods
 - Infrastructure/Construction goods
 - Consumer durables & non-durables
- Industrial growth is a key indicator of economic development (NCERT – Indian Economic Development).
- Linked with Gross Value Added (GVA) under Industry sector.
- Capital goods growth reflects future productive capacity creation.
- Consumption trends linked to aggregate demand (Keynesian theory).

Critical Analysis

Positives

- Strong capital goods growth → revival of investment cycle
- Manufacturing expansion → industrial resilience
- Infrastructure push → supports long-term growth

Concerns

- Weak consumer demand → stress in incomes & purchasing power
- Sectoral imbalance (mining, electricity slowdown)
- Risk of K-shaped recovery
- Growth dependent on government capex

Way Forward

- Stimulate consumption demand (rural + urban)
- Encourage private sector investment
- Improve energy and mining efficiency
- Maintain balance between investment-led and demand-led growth

Spain denies U.S. permission to use airspace for 'illegal' war on Iran, widening rift with Trump

Associated Press
MADRID

Spain has closed its airspace to U.S. planes involved in the war on Iran, the country's Defence Minister said on Monday, marking another step in the government's opposition to U.S. and Israeli involvement in the conflict in West Asia.

The country had already said that the U.S. could not use jointly-operated military bases in the Iran conflict, which Spanish Prime Minister Pedro Sanchez has described as illegal, reckless and unjust.

Minister Margarita Robles said on Monday that the same logic applied to the use of Spanish airspace in the conflict.

"This was made perfectly clear to the American military and forces from the very beginning. Therefore, neither the bases are authorised, nor, of course, is the use of Spanish airspace authorised for any



Protesters hold caricatures of U.S. President Donald Trump and Israeli PM Benjamin Netanyahu in Madrid during a demonstration under the slogan 'down with Trump and Zionism'. REUTERS

actions related to the war in Iran," Ms. Robles said.

Spain's government under Mr. Sanchez, one of Europe's most prominent left-wing leaders, has been Europe's loudest opposing voice against U.S. and Israeli military actions in

West Asia. He has called on the U.S., Israel and Iran to end the war, saying earlier this month: "You cannot respond to one illegality with another, because that's how humanity's great disasters begin."

After Mr. Sanchez's go-

vernment denied the U.S. use of the Rota and Moron military bases in southern Spain, U.S. President Donald Trump threatened to cut trade with Madrid.

It was the latest flare-up between Spain and the U.S., which made trade

threats against the European nation last year, too, when Mr. Sanchez said that his government would not increase its defence spending in accordance with a ramp-up agreed to by other NATO members following pressure from Mr. Trump.

At the time, Mr. Sanchez's government said that Spain could meet its military commitments by spending 2.1% of gross domestic product on defence, instead of the 5% the rest of the 32-nation military alliance agreed upon.

Vocal critic
Mr. Sanchez was also among the most vocal critics of Israel's actions in the war in Gaza, which instead of the Rota and Moron military bases in southern Spain, U.S. President Donald Trump threatened to cut trade with Madrid.

Iranian Parliament mulls possible exit from nuclear treaty

Reuters
DUBAI

Iran's Parliament is reviewing a possible exit from the Nuclear Non-Proliferation Treaty (NPT), Foreign Ministry spokesperson Esmaeil Baghaei said on Monday, while insisting that Tehran has not and will not seek nuclear weapons.

"What is the benefit of joining a treaty in which bullying parties at the international level not only do not allow us to benefit from its rights but also attack our nuclear facilities?"

Mr. Baghaei said, adding that "Tehran would respect the treaty as long as it is a member. Iran says its nuclear programme is for peaceful purpose and that as a signatory of the NPT it has the right to peaceful nuclear enrichment." "Regarding membership in this treaty, regardless of

Navy commander killed in Israeli strike, says Iran

TEHRAN
Iran confirmed on Monday that an Israeli strike had killed the commander of the naval force of the Revolutionary Guards, who Israel had said was responsible for the blocking of the Strait of Hormuz. Alireza Tangari "succumbed to severe injuries", it said. [PAGE 14](#)

our clear position on the prohibition of all weapons of mass destruction, this is genuinely a debate taking place within public opinion and at the parliamentary level," he added.

In June 2025, the U.S. and Israel attacked Iran's key nuclear facilities. In the ongoing war, Israel targeted Iran's nuclear facilities again.

- Nuclear proliferation
- Regional instability
- Threats to Strait of Hormuz (critical energy chokepoint)

Strategic Linkages

- Sovereignty and territorial integrity under UN Charter (Article 2)
- Airspace control as part of state sovereignty (Chicago Convention, 1944)
- Collective security vs strategic autonomy in alliances
- Nuclear non-proliferation regime:
 - NPT pillars: Non-proliferation, Disarmament, Peaceful use
- Strait of Hormuz:
 - ~20% of global oil trade passes through it (Energy security concept)
- Balance of power & Realism in International Relations

Critical Analysis

Positives

- Assertion of strategic autonomy by Spain
- Reinforces international law and sovereignty norms
- Prevents escalation by restricting military logistics
- Encourages diplomatic resolution over militarism

Concerns

- Weakens NATO cohesion during crisis
- May embolden adversaries due to lack of unified Western response
- Risks economic retaliation (trade tensions)
- Iran's possible NPT exit may trigger:
 - Nuclear arms race in West Asia
 - Collapse of global non-proliferation framework

Stakeholder Perspectives

- Spain: Legal, ethical opposition to war
- U.S.: Strategic/military necessity
- Iran: Security + sovereignty concerns
- EU: Divided response
- Global South: Support for rule-based order vs power politics

Way Forward

- Strengthen multilateral diplomacy (UN-led dialogue)
- Revive nuclear negotiations (e.g., JCPOA-type frameworks)
- Ensure freedom of navigation in Strait of Hormuz
- Promote balanced NATO decision-making respecting member sovereignty
- Reform global governance to ensure equity in treaty enforcement (NPT credibility)
- Encourage de-escalation through confidence-building measures (CBMs)

KEY HIGHLIGHTS

Context of the News

- Spain has closed its airspace to U.S. military aircraft involved in the Iran conflict.
- Spain had earlier denied use of joint U.S.-Spain military bases (Rota, Morón) for operations related to the war.
- Spanish PM Pedro Sánchez termed U.S.-Israel actions in West Asia as "illegal, reckless, and unjust."
- This reflects deepening divergence within NATO allies over the Iran conflict.
- Simultaneously, Iran is debating withdrawal from the Nuclear Non-Proliferation Treaty, citing attacks on its nuclear facilities.
- Conflict escalation includes targeted strikes on Iranian nuclear infrastructure and strategic figures.

Key Points

- Spain's decision:
 - Denial of airspace + military bases to U.S. for Iran-related operations.
 - Assertion of sovereign control over territory and airspace under international law.
- NATO tensions:
 - Spain resisted increasing defence spending to 5% GDP, proposing ~2.1%.
 - Highlights internal disagreements within NATO.
- U.S.-Spain friction:
 - U.S. (under Donald Trump) threatened trade retaliation.
- Iran's nuclear stance:
 - Iran remains an NPT signatory but is reviewing exit.
 - Claims right to peaceful nuclear enrichment under Article IV of NPT.
- Strategic developments:
 - Attacks on Iranian nuclear facilities raise concerns of:

Centre eyes new regulation to cover social media users

It plans to amend IT Rules and allow I&B Ministry to send takedown notices to individual users for posts; Internet Freedom Foundation calls it 'massive expansion of unconstitutional censorship'

Arun Deep
NEW DELHI

The Union government is planning to allow the Ministry of Information and Broadcasting (I&B) to send takedown notices to individual users for their social media posts. Under the IT Rules, 2021, the Ministry could issue such notices only to on-line news publishers.

In addition, any advisories to social media platforms by the Ministry of Electronics and Information Technology would, if not complied with, affect the firm's so-called "safe harbour", allowing them to be held liable in court for user content.

These changes have been put forth in a draft amendment on Monday to the Information Technology (Intermediary Guidelines and Digital Media Ethics Code) Rules, 2021, which were amended as recently as February.

In an explanatory memorandum on the proposed amendment, the IT Ministry said that the addition of individual user posts was a "clarification of applicability" of those rules to "news and current affairs



The amendments are clarificatory and procedural in nature and are intended to improve legal certainty, strengthen enforcement of Ministry directions, and ensure effective oversight of intermediary-hosted content, particularly news and current affairs services or electronics and information technology.

content hosted by non-publisher users". In a statement, Internet Freedom Foundation (IFF), an Indian digital rights advocacy organisation, decried the proposal as a "massive expansion of unconstitutional censorship and regulatory power".

The Ministry said these "amendments are clarificatory and procedural in nature and are intended to improve legal certainty, strengthen enforceability of Ministry directions, and ensure effective oversight of intermediary-hosted content, particularly news and current affairs."

IFF pushed back on that claim, pointing to a key change in the proposal - an inter-departmental committee (IDC) to hear ap-

peals against complaint outcomes, which broadened its mandate. "The original Rule 142 required the IDC to hear "complaints regarding violation or contravention of the Code of Ethics." "The amended version removes this requirement entirely. The IDC now hears: (a) grievances arising from decisions at Level I or II; or (b) "matters" referred to by the Ministry."

The government uses Section 79 of the IT Act, under which the IT Rules were notified, to warn social media platforms that content under a takedown notice, if retained, would lead to the loss of their safe harbour. Since February's amendment abruptly changed takedown tim-

elines to retain safe harbour to two-three hours from 24-36 hours, Meta has been taking down more posts and accounts under such notices. Blocking orders that are more legally binding are issued under Section 69A.

IFF accused the Centre of trying to sidestep orders by the Madras and Bombay High Courts, which have stayed certain parts of the IT Rules. "The cumulative effect of the amendments to Rules 8 and 14 is to re-construct the oversight machinery that the Bombay and Madras High Courts found constitutionally suspect, in a form designed to evade the interim orders," IFF said.

Several notices
The government has been increasingly issuing broad takedown orders in the past few weeks against posts and accounts that are anti-establishment, and ones that mocked Prime Minister Narendra Modi. Asked about the recent spurt in takedowns, IT Minister Ashwini Vaishnaw said that the Centre was targeting "AI-generated deepfakes" and "take news".

KEY HIGHLIGHTS

Context of the News

- The Union Government has proposed amendments to the Information Technology (Intermediary Guidelines and Digital Media Ethics Code) Rules, 2021.
- The amendments aim to:
 - Allow the Ministry of Information and Broadcasting (I&B) to issue takedown notices to individual users, not just digital news publishers.
 - Strengthen enforcement of government advisories to intermediaries.
- Non-compliance with advisories from the Ministry of Electronics and Information Technology may lead to loss of "safe harbour" protection.
- Civil society organisations like the Internet Freedom Foundation have criticised the move as excessive censorship.
- The proposal comes amid increasing takedown orders, including against alleged deepfakes and misinformation.

Key Points

- Expansion of Scope Earlier: Takedown notices applicable mainly to publishers of news & current affairs.
- Now: Extended to individual users posting such content.
- Safe Harbour Provision Under Section 79 of the IT Act, 2000, intermediaries (e.g., social media platforms) are protected from liability for user-generated content.
- Non-compliance with government orders may remove this protection → platforms become legally liable.
- Reduced Compliance Timeline Takedown timeline reduced from 24-36 hours to ~2-3 hours (Feb amendment).

- Inter-Departmental Committee (IDC) Changes Earlier: Only handled Code of Ethics violations.

- Now: Can hear:

- Any grievance from lower levels
- Matters referred directly by the Ministry
- → Expanded executive oversight

- Legal Basis for Blocking Section 69A of the IT Act, 2000: Enables government to issue binding blocking orders for sovereignty, security, etc.
- Judicial Context Certain provisions of IT Rules are under judicial scrutiny by High Courts (Madras & Bombay).

Static Linkages

- Freedom of speech subject to reasonable restrictions (Art. 19(2)).
- Doctrine of proportionality in restrictions on fundamental rights.
- Difference between publisher vs intermediary liability.
- Role of delegated legislation (rules under parent Act).
- Principles of natural justice in quasi-judicial bodies.
- Judicial review over executive actions.

Critical Analysis

Pros

- Tackles fake news & deepfakes
- Enhances platform accountability
- Faster response mechanism

Cons

- Risk of executive overreach
- Chilling effect on free speech
- Weak safeguards & transparency
- Burden on intermediaries

Way Forward

- Clear legal definitions (fake news, deepfake)
- Strengthen judicial oversight
- Ensure transparency & accountability
- Balance security with civil liberties

Earliest Census data set to be available in 2027; India has fewer villages than during Census 2011

Vijaita Singh
NEW DELHI

As Census 2027 is being conducted digitally, most of the data gathered during the process will be published in 2027, Mritunjay Kumar Narayan, Registrar-General and Census Commissioner of India, said on Monday.

He said the caste enumeration methodology for the second phase was yet to be finalised, and officials were studying multiple suggestions received on the subject.

Data shared by Census officials show that compared with Census 2011, there has been a decrease in the number of villages by over 1,000 and an increase in urban settlements – statutory towns and Census towns.

From Census 2011, the number of States and Union Territories increased



Mritunjay Kumar Narayan, and Sitowaji Das (left) addressing the media on Census 2027 in New Delhi on Monday. SC/HR, KUMAR VERMA

by one to 36; districts from 640 to 784, an increase of 144; sub-districts by 1,102 – from 5,990 to 7,092; statutory towns by 1,087 – from 4,041 to 5,128; and census towns by 688 – from 3,892 to 4,580. The number of villages declined by 1,030, from 6,40,932 in 2011 to 6,39,902, according to the administrative unit data presented by the

Commissioner.

Mr. Narayan said West Bengal was the only State that had not notified the Census process, and while deliberations were on with the State government, it had time till September 30 to carry out the exercise.

This would be the first digital Census, first to enumerate caste and first to allow a self-enumeration option to respondents. The

data keyed in during self-enumeration would be verified by enumerators during door-to-door visit and the option was only available for residents living in India, he said, allaying concerns of data manipulation.

"As per the Census Act 1948, the Census data are confidential and the respondents are to answer to the best of their knowledge. Only aggregate data is released, an individual's data cannot be shared with States or even the judiciary and do not also come under the purview of the Right to Information Act (RTI). Census data cannot be used to provide reservation benefits to any individual," Mr. Narayan said, while addressing a press conference before the first phase of Census kicks off on April 1 in certain States. He said Census data were beyond the "scope of

investigation."

16 languages

Mr. Narayan said the self-enumeration portal, available in 16 languages, would be live from April 1 to 15 for residents of the Andaman and Nicobar Islands, Goa, Karnataka, Sikkim, Odisha, Lakshadweep, Mizoram and the NDMC and Delhi Cantonment areas. Self-enumeration option would be available 15 days before the first phase of Census – the House Listing Operations (HLO) begins. The window for the first phase is April 1-September 30 for all States. The second phase – population enumeration where each individual's information in the household, such as religion, caste etc. would be asked, would be conducted in February 2027. "People can use mobile phones and laptop to fill in the data," he said.

KEY HIGHLIGHTS

Context of the News

- India will conduct its first digital Census in 2027, marking a major shift in data collection methodology.
- It will also be the first Census to include caste enumeration (method still under finalisation).
- The exercise will be conducted in two phases:
 - House Listing Operations (HLO): April–September 2026
 - Population Enumeration: February 2027
- Significant administrative and demographic changes since Census 2011 highlight increasing urbanisation and restructuring of districts and towns.
- The process continues to be governed by the Census Act, 1948, ensuring strict confidentiality.

Key Points

- The 2027 Census introduces a fully digital mode of data collection, where enumerators will use electronic devices instead of paper schedules, improving efficiency and reducing errors.
- A major innovation is the self-enumeration facility, allowing citizens to submit their data online in advance through a multilingual portal. However, this information will still be verified physically by enumerators to maintain reliability.
- The Census will, for the first time, include comprehensive caste data collection since independence, though the methodology is still under discussion due to its political and social sensitivity.
- Data trends since 2011 show a clear rise in urbanisation, reflected in the increase in statutory and census towns, alongside a slight decline in the number of villages. This indicates a gradual structural transformation of the Indian economy.

- Administrative units have expanded significantly, with an increase in districts, sub-districts, and urban settlements, which has implications for governance, resource allocation, and policy targeting.
- The Census maintains strict confidentiality provisions under the Census Act, 1948. Individual-level data cannot be shared with any authority, including courts, and is not subject to the RTI Act. Only aggregated data is published.

Static Linkages

- Census conducted under Census Act, 1948 by Registrar General of India.
- Decennial exercise (regular since 1881).
- Distinction between:
 - Statutory towns (legal notification)
 - Census towns (demographic criteria)
- SECC 2011: caste data collected but not fully released.
- Urbanisation linked with economic development and structural transformation.

Critical Analysis

Advantages

- Digital approach enhances speed, transparency, and accuracy
- Self-enumeration reduces burden on administration
- Caste data can improve targeted welfare delivery
- Better urban data helps in infrastructure planning

Challenges

- Digital divide may lead to exclusion of marginalised groups
- Concerns over data privacy and cybersecurity
- Political sensitivity around caste enumeration
- Risk of data inaccuracies in self-reporting

Way Forward

- Strengthen data protection and cybersecurity measures
- Ensure digital inclusion and awareness campaigns
- Develop a transparent caste enumeration framework
- Improve training and accountability of enumerators
- Use Census data effectively for policy design and evaluation

Elections come and go in India with predictable regularity, largely and more predictable because a new legislature must be constituted before the house reaches the end of its term. Combined with the practice of conducting elections together for logistical efficiency, the timing of polls becomes no big mystery.

Elections to the Legislative Assemblies of Assam, Kerala, Puducherry, Tamil Nadu and West Bengal, announced earlier this month, stand apart as they follow the Special Intensive Revision (SIR) of electoral rolls, which has not only pared down electoral rolls but also added to the political tensions between the Opposition parties in power in these States and the party ruling at the Centre. But that is not all.

Work extraordinary, the scale and phases
Setting up elections across 2.19 lakh polling stations in four States and one Union Territory, including those in the farthest corners, is no easy task even for a country with 75 years of electoral democracy. For example, polling officials took three hours in the challenging terrain of the Varanasi hills in Tamil Nadu's Theni district to serve five electors at the Vellimalai polling station. In Kerala's Idhakk, officials have to travel through 30 kilometres of rugged off-road terrain, followed by an eight kilometre walk to reach the Edamalakudy booth. Polling teams in Assam make it to the remote Dhanabandana polling station after a journey over nearly 60 km by ferry, road and crossing the Ibrahimpurra river.

Over 25 lakh election officials will serve a 17.4 crore electorate in these elections, making it one official for every 70 electors. The number includes 8.5 lakh security personnel and 49,000 micro-observers. In the midst of doubts being raised over the neutrality of officials, Section 28A of the Representation of the People Act binds their allegiance solely to the Election Commission of India (ECI). Over 1,000 central observers have already moved to the Assembly constituencies to make sure that nothing goes wrong.

The ECI has also made – and is still making – sizeable changes among senior administrative and police officials with the objective of ensuring fair polls, even as State governments such as West Bengal have been severely critical of these moves. Ideally, someday, heightened civic responsibility should make the deployment of forces around polling stations and poll time shuffling of officials redundant.

Efforts in recent years to complete polling in the fewest possible phases suggest matured election management and better governance. Multiple phases are often being attributed to the availability and movement of security forces, required to safeguard the integrity of polls. Polling days in politically volatile West Bengal



Akshay Raut
A former Director General, Election Commission of India

have been reduced to two phases – a significant reduction from the eight phases in 2013. This would be a confidence booster for election managers once concluded smoothly.

The four 'M' challenge
The ECI has said that these elections will be violence and inducement free. During the 2024 general elections, the ECI had declared a war on the 4Ms – 'Money', 'Muscle', 'Misinformation' and 'Model Code of Conduct (MCC)' violations.

With strong security and practically inaudible electronic voting machines, elections in India have been largely free from open threats of muscle power; but polarised campaigns and the denigration of some political parties continue to pose challenges to the conduct of peaceful elections. West Bengal has a chequered history of election-related violence, especially acts of post-poll vengeance. The State has been on the radar of the ECI for several weeks now – the vulnerability should be lower, but fingers crossed. The ECI has ordered round-the-clock live webcasting of all polling stations.

Electoral inducements, in cash or kind, have long persisted in electoral politics irrespective of concerns being expressed in important fora from time to time, court observations and sporadic public debates. Electoral inducements now drive fierce political competition. Political parties and candidates have experimented the profitable effect of this malignant strategy. Cash transfers from governments to targeted groups just before the announcement of polls is routine – in these elections as well – with the ECI again clarifying that its ruling commences only after the MCC comes into force. Campaign freebies abound, and party manifestos often flow fiscal logic in a free-for-all manner. Moves by the Supreme Court of India and the ECI to rein in the 'promise bazaar' have made little headway.

Enforcement agencies monitor polling areas closely, aiming to catch bribes in action and tracking the inflow of cash, liquor, drugs, and other goodies including digital transactions. In the 2024 general election, the authorities set up over 10,000 crore worth of inducement material countrywide, almost three times the amount set up in 2019. Tamil Nadu, more than the other States, will be tested once again. In 2021, inducement material worth over 21,000 crore was set up in five States, almost half of it from Tamil Nadu. Specially constituted field units – 5,200 static surveillance teams and an equal number of flying squads – will be expected to deliver a stellar performance. Over 6,000 crore worth of illicit inducements have been set in the first month.

Election managers have long faced offensive, misleading and inflammatory advertisements

close to polling day, leaving little room for rebuttal. The ECI has now banned political advertisements in the print media on poll day and one day prior to poll day unless pre-certified. A voluntary code of ethics for social media platforms – to prevent spurious use – has been only moderately effective, so poll officials aim to hold candidates' accounts more accountable for content and expenses, tightening offline media regulation, and swiftly counter fake news and deepfakes on digital media.

The contents in 2021 in these States/Union Territory saw several violations of the model code, with appeals to caste, religion, sect, and ethnicity. In this election, Kerala's multiethnic fabric and West Bengal's majority-minority dynamics are under strain, which could intensify closer to polling day. Regulators will be closely watched, though some argue that all types of verbal assaults should fall under free speech rather than make a futile attempt at ensuring a balancing act.

These are four States and a Union Territory with a high degree of political awareness. These are also States and a Union Territory with a record of high voter turnout between 70% and 80%. The SIR process, which has removed absentee, shifted, and deceased voters, is expected to boost participation figures. Over the past one and a half decades, the ECI's Systematic Voters' Education and Electoral Participation (SVEEP) programme has enhanced voter engagement. Collection of votes from the homes of electors over 85 years and persons with disabilities is a standout measure. Facility to deposit mobile phones at polling booths and ensuring colour photographs of candidates and larger font size on the EVM ballot are citizen-friendly innovations.

The duty of the voter
The voter's task will be to protect the sacred character of his entitlement from the acid rain of political campaigning and to make a moral choice at the electoral booth. Voter education has to be directed towards developing a civic resistance against blaring insinuations and provocations. Politicians should not be allowed a free walk over the moral judgement of the citizen-voter by gifts of cash and kind or false promise, or fabrication of opponents. Falling prey to fake and seasonal narratives is an insult to the power of the vote and the Constitution of India. Let the elections this summer be a win for India and its citizens in the four States and Union Territory. Even while candidates and political parties score their victories and defeats, let election managers derive satisfaction from yet another successful exercise.

The views expressed are personal

- Article 324 provides constitutional status to Election Commission
- Free and fair elections form part of Basic Structure doctrine
- Electoral rolls revision is a continuous statutory process
- Model Code of Conduct is a non-statutory ethical guideline
- Role of technology in governance and transparency

Critical Analysis

- Enhances credibility of elections through better monitoring and technology
- Reduction in phases improves administrative efficiency
- Electoral roll revision increases accuracy but raises concerns of bias
- Persistent role of money power and freebies undermines fairness
- Misinformation and deepfakes pose new-age threats
- Balancing regulation with freedom of speech remains challenging
- Heavy deployment of forces may raise concerns of over-centralisation

Way Forward

- Provide legal backing to Model Code of Conduct
- Strengthen regulation of political funding and freebies
- Develop robust mechanisms to counter misinformation and deepfakes
- Ensure transparency in electoral roll revision processes
- Enhance institutional independence and accountability of ECI
- Promote voter awareness for ethical electoral participation

KEY HIGHLIGHTS

Context of the News

- Legislative Assembly elections announced in Assam, Kerala, Tamil Nadu, West Bengal, and Puducherry after Special Intensive Revision (SIR) of electoral rolls.
- SIR aimed at removing duplicate, shifted, and deceased voters, but led to political controversy.
- Large-scale election exercise involving ~17.4 crore voters and ~2.19 lakh polling stations.
- Reduction in polling phases (e.g., West Bengal) indicating administrative efficiency.
- ECI focusing on addressing Money, Muscle, Misinformation, and MCC violations (4Ms).

Key Points

- Section 28A of Representation of the People Act ensures election officials are under ECI control.
- Deployment of ~25 lakh officials, including security personnel and observers.
- Use of webcasting and surveillance teams to ensure transparency.
- Seizure of large-scale inducements (cash, liquor, goods) during elections.
- Growing challenge of misinformation, including deepfakes and digital manipulation.
- Regulation of political advertisements through pre-certification norms.
- SVEEP programme improving voter awareness and participation.

Static Linkages

- Universal Adult Franchise ensures equal political participation

A flame the state cannot guarantee

India's LPG crisis that began in March 2026, following the war in West Asia, has passed familiar diagnoses: disrupted Strait of Hormuz shipping lanes, heavy import dependence, and inadequate storage. These observations are accurate as far as they go. What these fail to explain is why a decade-long welfare programme, which connected 32.83 crore households to clean cooking fuel, offered almost no protection to these households when a single chokepoint was disrupted. The supply chain describes the trigger; the welfare architecture explains why it hit so hard – and that is the more consequential question.

The welfare programme, Pradhan Mantri Ujjwala Yojana, has provided 10.33 crore connections to women from below-poverty-line households since 2016, more than doubling national LPG coverage over a decade. The ambition was genuine and the relief measurable. The International Institute for Sustainable Development (IISD) found that women saved about an hour in a day on cooking and cleaning after accessing LPG – a real difference for millions who had spent generations cooking on biomass.

Imperfections in a transition
The problem is not what PMUY delivered but what it quietly replaced. Before LPG, kerosene arrived through the Public Distribution System. Inefficient and leaky, it was a command-distribution system where the state held physical stock and the ration card determined access. When the government phased out PDS kerosene and enrolled households into LPG as a clean energy upgrade, it was also withdrawing from direct supply responsibility. By 2024, 13 States had become kerosene-free and millions of households depended on a globalised commodity market that the state does not control. The transition substituted imperfect but directly administered supply for high-quality market supply, without asking what would happen when that market



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failed. India imports about 60% of its LPG consumption and 90% of those imports pass through the Strait of Hormuz. India's Strategic Petroleum Reserves cover about 9.5 days of crude oil supply and are currently at 64% capacity, with no equivalent LPG-specific buffer. The state's ability to meet its clean cooking targets depends entirely on uninterrupted global commodity flows, while the welfare architecture – designed to scale uptake – was not built to ensure continuity under stress.

Gaps in a sovereign responsibility

The PMUY promise was built on visible markers of sovereign responsibility. Government branding on the cylinder, the Direct Benefit Transfer credit in the woman's account, and the scheme's naming after the Prime Minister – all signalling that the state was present and accountable. The war in West Asia and the LPG crisis exposes that communication and capacity were never aligned. The branding belonged to the state while the supply chain moved through markets and chokepoints that the state observed from a distance once the transition to LPG was complete. But when the Strait of Hormuz closes, the sovereign guarantee has no physical infrastructure behind it.

The cost of that misalignment is not distributed neutrally. One in four PMUY beneficiaries took only one refill or none at all in normal times, because refill costs exceeded what the subsidy covered for the poorest quintiles. With mandatory booking gaps at 45 days for rural areas and 25 days for urban areas and prices rising by ₹60 a cylinder in March, those households are the first to revert to biomass and the last to receive any relief when allocations tighten. Scheduled Caste and tribal households have 10% to 30% lower LPG access than upper-caste households, independent of income, partly because distributor networks in segregated rural geographies replicate caste hierarchies in how they allocate scarce supply. A war in West Asia activates those hierarchies.

The gendered dimension of this design flaw is equally structural. The scheme made women the formal beneficiaries of an entitlement while leaving its actual delivery entirely outside their control. The IISD found that in 74% of surveyed households, women made decisions on cooking energy sources. When LPG prices rose sharply, 14% said they would revert to biomass, leaving women to manage the shift without institutional support. Access framed as liberation from drudgery quietly restores it when supply fails and women carry that burden without institutional recourse.

None of this requires starting over. A two-month strategic LPG buffer, a statutory minimum of imports routed outside the Strait of Hormuz, and publicly available crisis protocols are design measures the current system has never implemented. Community biogas under Galvanizing Organic Bio-Agro Resources Dhan (GOBARdhan) with the Indian Biogas Association proposing a ₹10,000 per unit revival subsidy for five million dormant plants alongside accelerated piped gas for dense urban areas, provides targeted redundancy for the most exposed. A serious welfare architecture does not replace its primary delivery system when it comes under stress. Instead, it builds the redundancy underneath so that the stress never reaches the household.

In perspective

The deeper problem is that a decade of welfare expansion measured success in connections delivered and treated continually under stress as a problem for another day. An entitlement that holds only in undisturbed markets is not durable by any standard worth defending. India extended clean cooking to hundreds of millions of its people and called it transformation. The question the war is now forcing is whether transformation built on unbroken global supply chains, without buffers, without triage rules and without alternatives, can honestly be called a guarantee at all.

KEY HIGHLIGHTS

Context of the News

- India faced an LPG supply crisis in March 2026 due to disruptions in West Asia amid geopolitical conflict.
- Closure/threat to the Strait of Hormuz affected LPG imports, through which ~90% of India's LPG imports transit.
- India imports nearly 60% of its LPG consumption, exposing vulnerability to external shocks.
- The crisis exposed structural weaknesses in the Pradhan Mantri Ujjwala Yojana (PMUY), despite its large-scale expansion of LPG access.
- Rising LPG prices (₹60 increase in March 2026) and supply bottlenecks disproportionately affected poor households.

Key Points

- PMUY has provided over 10.33 crore LPG connections to women from BPL households since 2016.
- National LPG coverage expanded significantly to cover ~32.83 crore households.
- Around 25% of PMUY beneficiaries use LPG minimally (one or no refill annually), indicating affordability constraints.
- India lacks a dedicated strategic LPG reserve; existing Strategic Petroleum Reserves cover only ~9.5 days of crude oil demand.
- Transition from kerosene-based PDS to LPG reduced direct state control over fuel supply.
- Supply chain heavily dependent on global markets rather than sovereign distribution systems.
- Social inequities persist: SC/ST households show 10–30% lower LPG access than upper castes.

- Gender dimension: women are beneficiaries but lack control over supply stability and pricing decisions.

Static Linkages

- Energy security depends on diversification, strategic reserves, and domestic capacity.
- Welfare state obligations include ensuring availability, accessibility, and affordability of essential goods.
- Public Distribution System historically ensured controlled supply of essential commodities.
- Global chokepoints (e.g., Strait of Hormuz) are critical in international trade geography.
- Inclusive growth requires addressing social inequalities (caste, gender, rural-urban divide).
- Subsidy reforms and Direct Benefit Transfer aim to reduce leakages but may not ensure supply continuity.

Critical Analysis

Pros

- Improved clean energy access
- Reduced indoor pollution
- Women empowerment (time saving)

Cons

- Import dependence → vulnerability
- No buffer stock for LPG
- Affordability limits actual usage
- Welfare = access, not continuity
- Social inequality in access
- Gender burden persists

Way Forward

- Create strategic LPG reserves
- Diversify import sources/routes
- Targeted subsidy for poorest
- Promote alternatives (biogas – GOBARdhan Scheme)
- Expand PNG network
- Crisis management framework
- Strengthen last-mile delivery

Going downhill

A ground invasion of Iran will only make matters worse for the U.S.

President Donald Trump has made several self-contradictory statements ever since the U.S. and Israel attacked Iran on February 28, making it increasingly difficult to take anything that he says about the war seriously. In the early days, he insisted that the conflict would end soon, but it has now entered its second month. On March 21, he threatened to strike Iran's power plants in 48 hours unless Tehran reopened the Strait of Hormuz. The waterway remains under Iranian control, and Mr. Trump has extended his deadline twice. Despite his repeated claims that U.S. forces destroyed Iran's military capabilities, Tehran continues to attack U.S. bases in the Persian Gulf and Israel. Last week, U.S. media reported that an Iranian strike at the Prince Sultan Air Base in Saudi Arabia damaged an elite E-3 Sentry AWACS aircraft and several KC-135 aerial refuelling tankers. Mr. Trump now says that his administration is in talks with Iran and a deal is possible. But Iran says that it has got a U.S. proposal to end the war and has made its counter-proposal. The U.S. wants Iran to abandon its nuclear programme, limit its missile programme and reopen the Strait; Tehran demands war reparations, guarantees against future attacks and an end to fighting on "all fronts". Amid disputed claims about the talks, the U.S. is also sending more combat troops to West Asia in preparation for a possible ground attack.

Mr. Trump appears to have no easy exit. The Strait of Hormuz was open before he launched the war. Ending the conflict now while the waterway remains under Iranian control would seem like a defeat. The U.S. had a robust military footprint in the region. Today, most American bases in the Gulf have been battered. In Iran, Ayatollah Ali Khamenei's assassination voided his fatwa against the nuclear bomb, and its parliament is considering withdrawing from the Nuclear Non-Proliferation Treaty. Crude prices, under \$80 a barrel before the war, are now hovering around \$114 a barrel. Iran, which was under heavy sanctions, is making more money now because of the wartime sanctions relief. This war is already a disaster for the U.S., and Mr. Trump would worsen it by sending ground troops. The U.S. has not mobilised enough combat troops to launch a large-scale ground invasion. Many argue that the U.S. could try to seize some islands in the Gulf for leverage, but any attack would be extremely risky for both troops and the global economy. Mr. Trump's escalatory rhetoric, including threats to strike Iran's civilian infrastructure only underscores his desperation. Instead of digging deeper into the hole he has put himself in, he must start looking for a way out. A ground attack would close even the few remaining off-ramps he has.

KEY HIGHLIGHTS

Context of the News

- The United States under Donald Trump, along with Israel, launched strikes on Iran (Feb 28, 2026).
- Conflict has prolonged beyond initial expectations, entering its second month.
- Iran continues retaliatory attacks on U.S. bases in the Persian Gulf and Israel.
- Strategic tensions over the Strait of Hormuz remain unresolved.
- Reports indicate damage to key U.S. military assets in the Gulf region.
- Diplomatic negotiations are ongoing but with sharply divergent demands.
- Rising oil prices and geopolitical instability have global economic implications.

Key Points

- U.S. demands: Iran to abandon nuclear programme, curb missile programme, and reopen Strait of Hormuz.
- Iran's counter-demands: war reparations, security guarantees, cessation of hostilities.
- Iran considering withdrawal from Nuclear Non-Proliferation Treaty.
- Oil prices surged from below \$80 to ~\$114 per barrel due to supply risks.
- U.S. military bases in the Gulf have sustained significant damage.

- Possible escalation: U.S. troop mobilisation for potential ground invasion.
- Strategic miscalculation: Strait was open pre-conflict; closure now worsens U.S. position.
- Iran benefiting economically via indirect sanctions relief amid wartime demand.

Static Linkages

- Strait of Hormuz handles ~20% of global oil trade (Energy security relevance).
- NPT (1968): pillars—non-proliferation, disarmament, peaceful use of nuclear energy.
- Gulf region as a geopolitical hotspot due to hydrocarbon reserves.
- Concept of "Chokepoints" in maritime trade routes.
- Oil price shocks and their macroeconomic impact (inflation, CAD).
- War powers and executive decision-making in democracies.
- Balance of power theory in international relations.
- Role of deterrence and nuclear doctrine.

Critical Analysis

- U.S. credibility weakened due to prolonged conflict.
- Risk of regional war escalation.
- Threat to global energy security.
- Iran's possible NPT exit → nuclear proliferation risk.
- Economic impact: inflation, trade disruptions.
- Ethical issue: targeting civilian infrastructure.

Way Forward

- Immediate ceasefire via diplomacy.
- Revive nuclear deal framework.
- Secure Hormuz under international cooperation.
- De-escalation through negotiations.
- Energy diversification globally.

Spirit of the law

Any attempt to police faith will result in high-handedness

Legislation passed by Maharashtra and Chhattisgarh recently on religious conversions misleadingly claims to protect freedom of religion but effectively does the opposite. Laws made by both States restrict the individual freedom of faith through requirements of prior permission from the state, public disclosure, and by shifting the burden of proof to the accused. These States now join at least 10 others in having detailed legal restrictions on an individual's right to practise and profess any religion of their choice. It is true that the state has a duty to protect all citizens from force and fraud. But when that principle is applied to test whether a person's religious faith is an outcome of criminal force or fraud, it is a leap into chaotic darkness even with the best of intentions. What goes on in a person's mind, such as matters of faith, is not accessible to another person in its entirety, and any attempt to police faith will invariably lead to high-handedness. A batch of petitions challenging these laws has been pending before the Supreme Court of India, and the final status of the new laws in Maharashtra and Chhattisgarh will also be linked to the final determination of the constitutionality of such laws by the Court. Meanwhile, the laws will disturb social order and harmony, achieving the exact opposite of what they purportedly set out to do.

The provisions are harsh, intrusive and authoritarian. Under the Maharashtra law, a person intending to convert must give 60 days' notice and seek prior permission from a designated authority. Conversion must be registered within 25 days, or it will be treated as null and void. The authority will publish the notice locally, including at the relevant gram panchayat, inviting objections within 30 days. If objections are received, the authority may direct police to conduct an inquiry. The Chhattisgarh legislation also has similar provisions, but additionally exempts reconversion to one's ancestral religion from its purview. Even community religious gatherings can attract provisions of the Chhattisgarh law, which replaces a 1968 law made by undivided Madhya Pradesh. Anti-conversion laws are premised on a lack of agency of the individual and driven by an ideological framework that links nationality to faith. In a less passionate and more reasonable framing, a person's change of faith is no different from their decision to change their passport, political affiliation, or place of residence – all of which are legal. In any case, religions have no basis in verifiable scientific facts, and propagation of religion, a constitutionally guaranteed right, can easily be misrepresented as fraud. By seeking to resolve a problem that does not exist, the Bharatiya Janata Party is serving only its own narrow political interests.

KEY HIGHLIGHTS

Context of the News

- Maharashtra and Chhattisgarh have recently enacted/strengthened laws regulating religious conversions.
- These laws mandate prior permission, public notice, and administrative scrutiny before conversion.
- They join several other States (e.g., Odisha, MP, UP, Gujarat) that have enacted anti-conversion laws.
- A batch of petitions challenging such laws is pending before the Supreme Court of India.
- The debate centers on balancing freedom of religion with prevention of forced or fraudulent conversions.

Key Points

- Maharashtra law requires:
 - 60 days' prior notice to district authorities.
 - Registration of conversion within 25 days.
 - Public disclosure inviting objections.
- Chhattisgarh law:
 - Similar provisions with additional exemption for "reconversion" to ancestral religion.
 - Extends to community religious events.
- Burden of proof often shifts to the accused (person facilitating conversion).

- Laws empower administration and police to inquire into "intent" behind conversion.
- Critics argue these provisions:
 - Restrict individual autonomy.
 - Enable surveillance of personal belief systems.
- Supporters argue:
 - Necessary to prevent coercion, fraud, or inducement-based conversions.

Static Linkages

- Article 25: Freedom of conscience and right to freely profess, practise and propagate religion (subject to public order, morality, health).
- Article 26: Freedom to manage religious affairs.
- Reasonable restrictions doctrine under Part III.
- Doctrine of Essential Religious Practices (developed by judiciary).
- Indian Penal Code provisions on fraud, coercion, undue influence.
- Federal structure: "Public order" is a State subject (State List).
- Constituent Assembly debates emphasized individual conscience over state control.

Critical Analysis

Pros

- Prevents forced/fraudulent conversions.
- Maintains public order.

Cons

- Violates freedom of conscience.
- Prior permission → state interference in personal belief.
- Privacy concerns due to public notice.
- Burden of proof reversal → against criminal law principles.
- Scope for misuse/harassment.

Way Forward

- Define "force", "fraud", "inducement" clearly.
- Replace prior permission with simple intimation.
- Ensure judicial (not executive) oversight.
- Protect privacy and dignity.
- Use existing IPC provisions effectively.

Debate foreign policy, but tempered dissent is heard louder than vitriol

THE IRAN war defies hope for an early de-escalation despite conflicting reports of backchannel diplomacy. The theatre of conflict now extends to the Gulf states with the Iranians attacking US military assets in the region. Iran's blockade of the Strait of Hormuz could see the entry of NATO members into the conflict as well.

The war is a colossal tragedy that has extinguished thousands of innocent lives since February 28, reduced to rubble large human habitations, and caused the largest-ever disruption of the global oil and gas markets. Presented as a pre-emptive strike against apprehended nuclear adventurism by Iran, and as a necessary move to ensure regime change in support of freedom and human rights, the war has few takers for its moral and legal legitimacy. It is widely seen as a hegemonic exercise of raw power for dominion over people and energy resources. It is a tragic confirmation of the impotence of the post-1945 international legal order to preserve peace when confronted with such an exercise of hard power. US President Donald Trump's Venezuelan adventure and tariff wars attest to the collapse of what remains of the architecture of international law codified by the UN Charter, the Geneva Conventions and other treaties.

The coordinated US-Israeli attack on Iran — without authorisation by the UN Security Council or prior approval by the US Congress, and in breach of the War Powers Resolution of 1973 — lacks even a modicum of legal justification. The assassination of

Iran's political leaders and the scale of military strikes on civilian targets inside Iran violate the fundamental principles of "distinction, proportionality, military necessity and precaution". No concrete evidence of the apprehended nuclear strike by Iran against the US or Israel has been presented despite repeated queries by several prominent leaders of the Global South.

The regime change justification cited by Israel and the US for the use of force against Iran militates against the first principles of international law, founded in the inviolability of territorial integrity and sovereignty of nation-states. In 1975, the opinion of Judge Hardy Dillard of the International Court of Justice in the Western Sahara case reminded us that "it is for the people to determine the destiny of the territory and not the territory the destiny of the people". To accept, even remotely, the validity of the spurious regime change argument for waging war against a sovereign nation would need a rewriting of the UN Charter and the rules of war. This is even as mass atrocities and killings in Iran may justly be condemned as an affront to the collective consciousness of the international community.

Recent conflicts across the world in Ukraine, Gaza, Venezuela and Iran, and the global tariff wars unleashed by the US, compel a philosophical encounter with the reality and nature of power. The perceived indifference of political leadership at the global high table



ASHWANI KUMAR

to human suffering signals a reversal of civilisational progress, a "protracted widespread retrogression" of a world that must continue to aspire to civilise itself in the use of force. But, even as we bemoan the decline, if not the demise, of international law as a guarantee of universal peace, we can draw comfort in the thought that "you can bomb the world into pieces, but you cannot bomb it into peace". We know from history that war itself is the problem and not a solution to the inequities of our world, and injustice in any form carries within itself the seeds of revolution. We also know that unless free of the dehumanising ravages of war, the realisation of a humane world order will remain an illusion.

Prime Minister Narendra Modi's repeated exhortations for peace and deescalation signal a clear disapproval of armed hostilities and the urgency of ensuring a mediated settlement. This is consistent with India's promotion of peaceful co-existence among nations and the eschewing of war as an instrument of conflict resolution. A necessary corollary of this nuanced approach would be to ensure adherence to a stricter international legal regime as a guardrail against the imperial exercise of power. This is premised upon a binding commitment to the substance and processes of international law on the part of those who hold the levers of power to sustain global justice. India's role at this critical juncture must be of a peacemaker in

the best traditions of its foreign policy, anchored in our ancient philosophy of *vasudhaiva kutumbakam* and Nehruvian internationalism.

However, to be heard with respect, our perspective must recognise the realities of a dynamic power calculus and compulsions of geopolitics. In responding to a menacing war, the government's judgement on how best to safeguard national interest as the ubiquitous moral imperative is entitled to deference. While issues relating to the nation's foreign and defence policies are not beyond debate, public discourse must acknowledge that a serving government alone is best equipped to leverage and harness the factors of national power in the service of domestic goals. Also, it is impolitic to accuse the leader of the government and by necessary implication, a highly competent national foreign policy establishment, of bad faith in the conduct of foreign policy. In any case, a tempered articulation of dissent has greater resonance than accusations laced with vitriol.

Let us forget, the challenge of diplomacy is to align principle with power in a mutually reinforcing engagement so as not to be pushed to the margins of irrelevance. We must ensure that India is not "acquiescent" in unconscionable unilateralism in a world that must recognise the imperatives of multipolarity and multilateralism.

The writer is a senior advocate, Supreme Court, and former Union Minister for Law and Justice. Views expressed are personal

- Principles of International Humanitarian Law (Geneva Conventions): distinction, proportionality, necessity
- Concept of sovereignty and territorial integrity in international relations
- Non-alignment and strategic autonomy in foreign policy
- Energy security and critical maritime chokepoints (Strait of Hormuz)
- Role of International Court of Justice in dispute resolution

KEY HIGHLIGHTS

Context of the News

- Coordinated military strikes by the U.S. and Israel on Iran since February 28 have escalated into a prolonged regional conflict affecting Gulf security and global energy markets
- Iran's retaliatory actions, including attacks on U.S. assets and potential blockade of the Strait of Hormuz, have widened the theatre of conflict with risks of NATO involvement
- The conflict has triggered massive humanitarian losses and severe disruptions in global oil and gas supply chains
- The intervention lacks explicit authorization from international legal bodies, raising questions over legitimacy and erosion of global governance norms

Key Points

- No UN Security Council authorization or clear evidence of imminent nuclear threat used to justify the attack
- Alleged violations of international humanitarian law principles: distinction, proportionality, and military necessity
- Increasing trend of unilateral military actions undermining post-World War II global order
- Strategic importance of Strait of Hormuz: ~20% of global oil trade passes through it (Energy Information Administration)
- Rising geopolitical polarization with Global South questioning Western interventionism
- India has adopted a balanced stance emphasizing de-escalation, dialogue, and protection of national interests

Static Linkages

- UN Charter: Article 2(4) prohibits use of force except in self-defense or UNSC authorization

Critical Analysis

- Undermines rules-based international order and weakens credibility of UN system
- Sets dangerous precedent for regime change interventions violating sovereignty
- Humanitarian crisis and civilian casualties raise ethical concerns
- Energy market volatility impacts developing economies disproportionately
- Highlights asymmetry of power in global governance structures
- India faces strategic dilemma: balancing relations with U.S., Iran, and Gulf nations
- Decline of multilateralism and rise of unilateral coercive diplomacy

Way Forward

- Strengthening multilateral institutions like UN and reform of UNSC
- Promoting diplomatic negotiations and ceasefire mechanisms
- Ensuring adherence to international humanitarian law
- Diversification of energy sources to reduce dependence on conflict-prone regions
- India to play proactive role as mediator leveraging its strategic autonomy
- Building consensus among Global South for rules-based order
- Enhancing maritime security and safeguarding trade routes

If war continues, cracks will show in fuel price ceiling



MADAN SABNAVIS

THE GOVERNMENT has lowered the excise duty on petrol and diesel to protect the consumer as of now. It is not certain that this situation will persist. There can be further action depending on the course of the war in West Asia and the price of oil. At present, the price of fuel at the pump is unchanged for public-sector companies, while one private company has announced an increase. So, for how long can the retail price be held on?

Let us look at the structure of petrol prices in Delhi. At present, one litre of petrol costs Rs 95. Of this, the actual price charged by the oil marketing companies (OMCs) to the dealer is around two-thirds of the final price or Rs 63/litre post the excise cut. The excise component is now around 12.6 per cent — this is the amount that the government earns at Rs 11.90/litre. The dealer commission is around 4.6 per cent or Rs 4.40 per litre. And then there is the value-added tax, which is 16.2 per cent of the price. VAT, which is charged on an ad valorem basis, is one part of the price that varies across states. This explains why the price of petrol varies across states.

So far, the burden of higher oil prices is being borne by the OMCs. The 66.6 per cent share in the final price also includes a profit being earned by these companies, which keeps being reduced as the cost of crude goes up. The interesting bit is that while Brent had peaked at \$118.4/barrel on March 20, the weighted average price for India is close to \$150 per barrel. As of March 24, the average price was \$147/barrel. The price was \$71 on February 27, which was just before the war began. Add to this the rupee depreciation of 3.3 per cent during the period from February 27 to March 25, and the cost is up further. It can be seen from this that as long as the Centre and state's share in the static final price remains unchanged, the same is absorbed by the OMCs.

Here, it must be pointed out that the OMCs earned a higher profit when the price of oil came down to the range of \$60-70 per barrel as the consumer price was unchanged at Rs 95/litre and the excise and VAT rates remained unchanged. The government did impose a supernormal profit tax on these companies and hence the gain was apportioned between the two.

However, with the cost of crude increasing sharply, the government has to take a call on apportioning this amount. In the Union Budget for FY27, it has been assumed that collections from the excise tax would be Rs 3.88 lakh crore as against Rs 3.36 lakh crore in FY26. The present reduction in excise duty would mean a decline in tax collections. A similar action could also be considered by states. The option to increase the retail price can be exercised and doing so will probably steady the government's fiscal maths. However, it will run the risk of pushing up inflation at a time when there is already concern over the possibility of this being an El Niño year.

On balance, it may just be a matter of time before the price matrix is revised. It does look as if the next level of intervention will be at the consumer end, if and when required.

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The option to increase the retail price can be exercised and doing so will probably steady the fiscal maths of the government. However, it will run the risk of pushing up inflation

KEY HIGHLIGHTS

Context of the News

- The Union Government reduced excise duty on petrol amid rising global crude oil prices triggered by geopolitical tensions in West Asia.
- Despite the tax cut, retail fuel prices have largely remained unchanged due to increasing crude oil costs and rupee depreciation.
- Oil Marketing Companies (OMCs) are currently absorbing the increased burden instead of passing it on fully to consumers.
- Brent crude prices surged from around \$71/barrel (pre-conflict) to ~\$147–150/barrel in March.
- Fiscal implications arise as excise duty collections are projected at ₹3.88 lakh crore in FY27 (Budget estimate).

Key Points

- Petrol price in Delhi ≈ ₹95/litre; composition:
 - OMC base price ≈ ₹63/litre (~66.6%)
 - Excise duty ≈ ₹11.9/litre (~12.6%)
 - Dealer commission ≈ ₹4.4/litre (~4.6%)
 - VAT ≈ 16.2% (varies across states due to ad valorem nature)
- Rising crude prices + rupee depreciation (~3.3%) → increased import cost.
- OMCs' profit margins shrink when crude rises; earlier windfall gains (at \$60–70/barrel) were partially taxed via windfall tax.
- Current price stability is artificial—burden shifted to OMCs, not consumers.

- States' VAT flexibility leads to inter-state fuel price variation.
- Trade-off:
 - Higher prices → inflation risk
 - Lower taxes → fiscal deficit risk

Static Linkages

- India imports ~85% of its crude oil requirement (Economic Survey).
- Fuel taxation is a major indirect tax source (Union + State finances).
- VAT is imposed under State List (Seventh Schedule, Constitution of India).
- Excise duty is levied by the Union under Central taxation powers.
- Inflation transmission: fuel prices affect WPI & CPI via cost-push inflation.
- Exchange rate depreciation increases import bill (Balance of Payments concept – NCERT Macroeconomics).
- Windfall tax concept linked to supernormal profits in extractive industries.

Critical Analysis

- Pros
 - Excise cut provides immediate relief potential to consumers.
 - Helps contain inflation during global uncertainty.
 - Political economy consideration—protects consumer sentiment.
- Cons
 - Revenue loss affects fiscal deficit and welfare spending capacity.
 - Artificial price control burdens OMCs, affecting their financial health.
 - Delayed price revision can lead to sudden shocks later.
 - Weakens price signals → discourages energy efficiency.
- Stakeholder Perspective
 - Consumers: benefit from stable prices but face future uncertainty.
 - Government: balancing inflation vs fiscal stability.
 - OMCs: profit compression and under-recoveries.
 - States: reluctant to cut VAT due to revenue dependence.
- Challenges
 - Volatile global oil market due to geopolitical tensions.
 - Exchange rate instability.
 - Managing inflation alongside growth slowdown risks (El Niño impact on food inflation).

Way Forward

- Gradual and calibrated pass-through of fuel price increases to avoid shocks.
- Rationalization of fuel taxes (long-term inclusion under GST debated).
- Strengthening strategic petroleum reserves to cushion volatility.
- Diversification of energy sources (renewables, biofuels, EVs).
- Coordinated Centre-State fiscal response (shared tax burden reduction).

Sex test in sports takes toll on right to equality

LAST WEEK, the International Olympic Committee (IOC) banned transgender women and athletes with differences in sex development, with some exceptions, from competing in the women's categories for elite sporting events such as Olympic Games. The decision is apparently based on apprehensions about the unfair advantages these athletes may enjoy due to biological reasons. The IOC also mandated a once-in-a-lifetime SRY test or sex test for women athletes. Until now, the Committee had left the matter to international federations. The new policy, the latest in a series of bans and rollbacks, is ostensibly to ensure standardisation—since the “smallest margins” can change outcomes in elite sports. With the 2028 Los Angeles Olympics coming up, it may also have been motivated by a desire to avoid conflict with the Donald Trump administration, which has banned trans women from women's sports.

Questions of accuracy and reliability surround the Sex-determining Region Y (SRY) test. Biological sex is determined by an interplay of chromosomal, gonadal, hormonal, and phenotypic factors. Only testing positive for the SRY gene does not mean that an athlete benefits from the hormone it produces. There is also no conclusive evidence that transgender women hold an athletic advantage over cisgender women. In fact, after the 1996 Olympics, the IOC had started phasing out universal sex testing, stating that it was an inaccurate metric to determine sex and athletic advantage, besides being unethical. Sex testing also disproportionately impacts women from the Global South and women of colour. Their genetic makeup diverges from the Eurocentric standards used for most testing and eligibility criteria.

The ban, alongside mandatory medical testing for women, undermines principles of equality—male athletes do not have to cross the medical test hurdle. It raises the entry barrier for athletes, especially from low-resource backgrounds, and violates women's dignity and privacy. It also diverts attention from the many real obstacles women athletes face: Unequal funding, lack of access to training, pay disparity, gender-based violence, besides stigmatising transgender and DSD athletes. A policy intended to ensure fairness for women in sports needs to be grounded in scientific evidence. It cannot come at the cost of basic rights, and by making conditions for participation tougher for those it claims to protect.

KEY HIGHLIGHTS

Context of the News

- International Olympic Committee (IOC) has introduced a new policy restricting participation of transgender women and athletes with Differences of Sex Development (DSD) in women's categories at elite events.
- Mandatory “once-in-a-lifetime” Sex-determining Region Y (SRY) gene test has been proposed for female athletes.
- Earlier, IOC had left eligibility rules to international sports federations; this marks a shift toward centralised regulation.
- Decision comes ahead of 2028 Los Angeles Olympics and amid global debates on fairness in women's sports.

Key Points

- SRY gene is located on the Y chromosome and is associated with male sex determination, but sex differentiation involves chromosomal, hormonal, and phenotypic factors.
- Scientific consensus remains inconclusive regarding athletic advantage of transgender women over cisgender women.
- IOC had phased out universal sex testing after the 1996 Olympics citing inaccuracy and ethical concerns.
- Policy aims to ensure “fair competition” where marginal differences can determine outcomes.
- Critics highlight disproportionate impact on athletes from the Global South and women of colour due to genetic diversity.

- Mandatory testing raises concerns over privacy, dignity, and increased entry barriers.
- Male athletes are not subjected to equivalent medical scrutiny, raising equality concerns.

Static Linkages

- Fundamental Rights: Articles 14 (Equality before law), 15 (Non-discrimination), 21 (Right to dignity and privacy).
- Supreme Court judgment in NALSA v. Union of India recognising transgender rights and self-identification.
- Principles of inclusivity and non-discrimination in international human rights law (Universal Declaration of Human Rights).
- Biological concepts from NCERT: Sex determination involves chromosomes (XX/XY), hormones, and gene expression—not a single gene.
- Ethical dimensions of sports governance: fairness vs inclusion debate.
- Role of international organisations in global standard-setting.

Critical Analysis

Pros

- Ensures uniform global standards instead of fragmented federation rules.
- Addresses concerns of competitive fairness in elite sports.
- Attempts to create objective eligibility criteria.

Cons

- Scientific limitations: SRY test alone cannot determine athletic advantage.
- Violates privacy and bodily autonomy of athletes.
- Discriminatory: Only women athletes face mandatory testing.
- Excludes marginalised groups (transgender, DSD athletes).
- Reinforces Eurocentric biological standards.
- Shifts focus away from structural issues like funding disparity and gender bias.

Stakeholder Concerns

- Athletes: dignity, career opportunities, mental health.
- Sports bodies: balancing fairness vs inclusion.
- Governments: aligning policies with human rights commitments.
- Society: evolving understanding of gender and identity.

Way Forward

- Develop evidence-based, sport-specific eligibility criteria rather than blanket rules.
- Ensure policies align with human rights principles and scientific consensus.
- Promote inclusivity through alternative competition categories or frameworks.
- Strengthen safeguards for privacy and informed consent in testing.
- Address structural inequalities: funding, training access, and safety of women athletes.
- Encourage interdisciplinary research combining sports science, genetics, and ethics.
- Greater stakeholder consultation including athletes, medical experts, and rights groups.