

# DAILY NEWSP APER ANALYSIS

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**CHANAKYA IAS ACADEMY  
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# Russia expresses readiness to boost oil, LNG supplies to India

Russian Deputy PM Manturov discusses trade, fertilizers, connectivity, people-to-people ties with Modi; Russia cites 'particular attention' paid to cooperation in sectors like oil, gas; joint project for production of urea under development, says Manturov

Kallol Bhattacharjee  
NEW DELHI

Amid the oil shock and supply chain disruptions triggered by the U.S.-Israel war on Iran, Russia has assured that its energy companies have the capacity to "steadily increase" the supply of oil and liquefied natural gas (LNG) to India, and also "continue" to address India's fertilizer needs.

Russian Deputy Prime Minister Denis Manturov, on a two-day visit, called on Prime Minister Narendra Modi on Thursday and discussed the supply of fertilizers.

"We discussed our mutually beneficial cooperation in trade, fertilizers, connectivity and people-to-people ties," said Mr. Modi, who "welcomed sustained efforts from both sides" to realise the agreements of the 23rd India-Russia Annual Summit hosted here in December 2025.

The visit is being seen as part of the preparations by the two sides ahead of the



Narendra Modi interacts with Russian Deputy Prime Minister Denis Manturov in New Delhi on Thursday. ANI

## India-bound oil heads to China?

CHENNAI Ping Shun, an Iranian crude oil carrier that had been showing it was heading to India, for three days after crossing the Strait of Hormuz, is heading to China, as per marine logistics and commodity markets analytics firm Kpler. > PAGE 11

for the BRICS where India is the current Chair.

The group has attracted attention in recent weeks as it has not made a statement on the evolving situation in West Asia, though Russia, India and China, who form a trilateral subgroup called RIC, have indicated that they will work closely within BRICS, Shanghai Cooperation Organisation and the UN on issues that affect common interests of the Global South.

This was followed by the March 30 Foreign Office Consultations between India and Russia led by Foreign Secretary Vikram Misri and Russia's Deputy Foreign Minister Andrey Rudenko.

This week, the Indian side hosted Vladimir Yakushev, First Deputy Chairman of the Federation Council (Upper House) of the Federal Assembly of Russia. On Thursday, Mr. Yakushev met Deputy Chairman of the Rajya Sabha Harivansh Narayan Singh and Lok Sabha Speaker Om Birla.

upcoming BRICS summit to be hosted by India and the India-Russia annual summit scheduled in Russia this year.

According to the Russian embassy, Mr. Manturov said that Russia has increased supplies of "in-demand mineral fertilizers to India by 40% and is ready to continue meeting India's needs for this product".

He also mentioned that a joint project for the production of carbamide (urea) is "under development". "Particular attention was paid to cooperation in the oil and gas sector," Manturov con-

firmed that Russian companies have the capacity to steadily increase supplies of oil and liquefied natural gas to the Indian market," said the embassy readout.

Mr. Manturov also met with External Affairs Minister S. Jaishankar, Finance Minister Nirmala Sitharaman and National Security Advisor Ajit Doval, and the leaders discussed continued energy supply to India.

In a press note, the External Affairs Ministry said Mr. Jaishankar and Mr. Manturov "exchanged views on regional and global developments, including the conflict in West

Asia." Mr. Manturov said Russia will deepen nuclear cooperation with India.

Other topics such as industrial cooperation, space and educational projects were discussed in the meetings.

Mr. Manturov's Delhi visit, which ended on Friday, took place days after Russian Foreign Minister Sergei Lavrov and Mr. Jaishankar addressed a conference on bilateral relations through a video link on March 23, during which Mr. Lavrov indicated Russia's preparations for the annual summit.

Mr. Lavrov had expressed Russia's support

- BRICS
- Shanghai Cooperation Organisation (SCO)
- United Nations
  - Focus on issues of the Global South.
  - Diplomatic Engagements Meetings with External Affairs Minister, Finance Minister, NSA.
  - Parliamentary exchanges between Russian and Indian legislative leaders.

## Static Linkages

- India imports ~85% of its crude oil needs (Economic Survey).
- Fertilizer sector is critical for food security and MSP-linked agriculture system.
- Urea is the most widely used nitrogenous fertilizer in India.
- BRICS represents major emerging economies accounting for ~40% of global population.
- Energy security is a core component of national security and economic stability.
- Diversification of energy sources is part of India's energy policy strategy.

## Critical Analysis

### Advantages

- Ensures stable energy supply during global disruptions.
- Secures fertilizer availability → supports agriculture.
- Strengthens India-Russia strategic partnership.

### Concerns

- Risk of overdependence on Russia.
- Exposure to Western sanctions pressure.
- Contradicts climate commitments (fossil fuel dependence).

### Challenges

- Payment mechanisms (rupee-ruble trade).
- Balancing strategic autonomy vs global alignment.

## Way Forward

- Diversify energy sources (Middle East, renewables).
- Promote domestic fertilizer production & nano-urea.
- Strengthen strategic petroleum reserves.
- Continue multi-alignment diplomacy.

## KEY HIGHLIGHTS

### Context of the News

- Amid disruptions caused by the U.S.-Israel conflict with Iran in West Asia, concerns over global oil supply chains and fertilizer availability have intensified.
- Russia has assured India of steady increases in oil and LNG supplies, along with continued fertilizer exports.
- Russian Deputy PM Denis Manturov visited India and held discussions with Prime Minister Narendra Modi and key ministers.
- The visit aligns with preparations for the upcoming BRICS Summit (hosted by India) and the India-Russia Annual Summit (2026).
- Russia reported a 40% increase in fertilizer exports to India, with plans for joint urea production projects.

### Key Points

- Energy Security Russia is willing to expand crude oil and LNG exports to India.
- India has increased reliance on discounted Russian crude post-2022 geopolitical shifts.
- Fertilizer Cooperation Russia increased supply of mineral fertilizers by ~40%.
- Joint project for carbamide (urea) production under development.
- Strategic Engagement Talks covered trade, connectivity, nuclear energy, industrial cooperation, and space collaboration.
- Emphasis on strengthening ties before BRICS and bilateral summit.
- Multilateral Coordination India-Russia-China (RIC) grouping to coordinate positions in:

# Plan to relocate Great Nicobar's tribal communities stirs fresh concern

Abhinav Lakshman  
NEW DELHI

A draft plan outlining the "relocation" of Nicobarese tribal communities affected by the Union government's Great Nicobar Island (GNI) mega-infrastructure project "to their ancestral lands" has created confusion and is exacerbating existing apprehensions among locals.

They have been, for four years, protesting the clearance for the ₹92,000-crore project after withdrawing their consent in 2022, alleging that their forest rights had not been settled.

This draft "Comprehensive Tribal Welfare Plan", prepared by the Andaman and Nicobar Islands administration and circulated on March 13 for consultation with line departments and the Tribal Council of

Great Nicobar, proposes a 42.52-crore outlay over 24 months for the "relocation of Nicobarese tribal communities from tsunami-affected or project-impacted areas", which involves housing, land development and basic infrastructure.

However, details of where the proposed relocation will take place and who will be relocated have left members of the Tribal Council of Great and Little Nicobar confused, according to Nicobarese community leaders who spoke to *The Hindu*.

They said they were handed a copy of the draft plan on March 28 and have since been called for two meetings by the district administration in Campbell Bay to sign off on it. This comes as the Union government told a Calcutta High Court Bench on March 30 that it needed 15



**Green concerns:** The draft was prepared by the Andaman and Nicobar Islands administration. AFP

days to "demonstrate that consent has been taken from the tribal people" for its project.

At a meeting on April 1, the Tribal Council submitted a letter pointing out that some aspects of the draft were unclear and requested a Hindi translation of it. They said they would need at least a month to re-

view the translated document.

Notably, while the draft plan states the GNI project "involves relocation", the Centre has repeatedly said the project would not "disturb or displace tribes".

#### On ancestral lands

According to a letter attached to the draft, the

plan was prepared after Tribal Council leaders demanded a return to ancestral villages on the west coast of GNI that were destroyed in the 2004 tsunami, after which communities were shifted to encampments in Rajiv Nagar and New Chingeh near Campbell Bay.

However, the draft plan states, "The project involves relocation to Rajiv Nagar (32 households, 101 persons) and New Chingeh (30 households, 117 persons)."

In a section, the plan proposes Pulobhabi for "community purposes" of residents in Rajiv Nagar, to "facilitate periodic visits to ancestral lands", while adding, "an option shall remain open" for families to return to ancestral villages outside the project area. For New Chingeh residents, the plan records their desire to return to

Old Chingeh and Pulo Baha, but notes a final decision will be taken after assessing land availability and consultations, while their existing accommodations will be upgraded.

Further, the plan lists all enumerated families in Rajiv Nagar and New Chingeh (62 families in total) and then states: "Proposed relocation site: Pulobhabi, western coast of GNI".

The tables in the draft also add to the ambiguity: allocations are made for upgrading 62 homes and building only 30 new homes, while another section states permanent shelters "will be built for all 62 households" – neither part explicitly mentions where these homes would come up. District authorities have not yet responded to *The Hindu*'s queries on what exactly the plan proposes.

A leader of the Tribal

Council said Pulobhabi is just one among several ancestral village sites, and the proposal lists only about 13 pre-tsunami Nicobarese villages when there are many more.

In New Delhi on March 20, Great and Little Nicobar Tribal Council chief Barnabas Manju had said the community has long demanded a return to all ancestral villages along the west coast since displacement in 2004.

Soon after the project was granted Stage-I clearance in 2022, the community withdrew their consent, fearing that it would encroach on their forest lands, including ancestral villages, preventing their return.

Council leaders say the apprehension has been exacerbated as the administration has not clearly explained project boundaries.

## KEY HIGHLIGHTS

### Context of the News

- The Union government's ₹92,000-crore Great Nicobar Island (GNI) mega infrastructure project has triggered concerns among the Nicobarese tribal community.
- A draft "Comprehensive Tribal Welfare Plan" proposes relocation of tribal families from project-impacted/tsunami-affected areas.
- Confusion persists regarding:
  - Exact relocation sites
  - Number of affected families
- The Tribal Council of Great and Little Nicobar has raised objections citing lack of clarity and consultation.
- The community had withdrawn consent in 2022, alleging non-settlement of forest rights.
- The issue is under judicial scrutiny in the Calcutta High Court, where the Centre must prove free, prior, informed consent (FPIC).

### Key Points

- Project Features: International container transshipment terminal
- Greenfield airport
- Township and power infrastructure
- Relocation Plan: ₹42.52 crore allocation over 24 months
- Covers 62 Nicobarese families
- Includes housing, land development, and infrastructure
- Ambiguities: Conflicting references to relocation:
  - To existing settlements (Rajiv Nagar, New Chingeh)
  - To Pulobhabi (ancestral site)
- Inconsistent data:
  - 62 homes to be upgraded vs only 30 new houses planned
- Community Concerns: Fear of permanent displacement from ancestral lands

- Lack of clarity on project boundaries
- Demand for return to pre-2004 tsunami villages
- Government Position: Claims project will not displace tribes
- Yet draft plan explicitly mentions relocation

### Static Linkages

- Article 244 & Fifth/Sixth Schedule – Protection of tribal interests (though A&N not under Sixth Schedule, spirit applies)
- Forest Rights Act, 2006 (FRA):
  - Recognition of individual & community forest rights
  - Mandatory Gram Sabha consent for diversion
- Panchayats (Extension to Scheduled Areas) Act, 1996 (PESA) principles (though not directly लागू in A&N, relevant for tribal self-governance norms)
- Environmental Impact Assessment (EIA) Notification, 2006 – clearance for large infrastructure projects
- Island Coastal Regulation Zone (ICRZ) norms
- 2004 Indian Ocean Tsunami – led to displacement of Nicobarese communities

### Critical Analysis

Positives:

- Strategic location near global shipping routes
- Economic and infrastructure development
- Enhances India's maritime security

Concerns:

- Incomplete implementation of FRA, 2006
- Questionable free, prior, informed consent
- Risk of cultural displacement
- Ecological sensitivity of island ecosystem
- Administrative opacity

### Way Forward

- Complete forest rights settlement before project execution
- Ensure free, prior and informed consent
- Provide clear, transparent rehabilitation plan
- Balance strategic needs with ecological sustainability
- Strengthen tribal participation in decision-making

# Kerala's development decade

The decade from 2016 to 2026 has been a period of rapid and unprecedented economic development in the State of Kerala. These changes have been achieved despite the financial constraints imposed on the State by the Union Government. Kerala has distinguished itself as the only State to sustain a formal planning process, enabling it to significantly increase capital expenditure from 2017 onwards, contrary to the declining trend observed in 18 major States after the dissolution of the Planning Commission.

Kerala's growth rates are comparable to, and in some years higher than, the national average. Every sector of the economy has been put on a new growth path. The share of budgetary funds designated exclusively for people of the Scheduled Castes (SC) and Scheduled Tribes (ST) has consistently exceeded the share of SC/STs in the State. Since 2016, administrative approval for more than 1,200 infrastructure projects has been given for projects financed by the innovative new instrument of the Kerala Infrastructure Investment Fund Board (KIIFB). Local governments are now not only instruments of people's participation but also catalysts of income-growth.

Kerala Bank was created by consolidating district cooperative banks into a single institution – a move that has strengthened financial stability, expanded rural credit, and opened the way for a people-oriented development bank. The heightened role of cooperative establishments can be illustrated with a single stand-out fact: Kerala is certainly the only State of the Union in which the largest civil construction company is a workers' cooperative.

**On education and health**  
There have been major investments in school infrastructure, teacher development, curriculum renewal, and IT-enabled learning. The State has achieved universal, free elementary education with a zero per cent dropout at the preparatory and middle-school levels; the dropout rates among SC/ST students are among India's lowest. Kerala is also India's first fully digital State in school education. In higher and technical education, there have been reforms in governance, curriculum, and institutional structures, along with strong public investment. All these efforts have contributed to improved national rankings for schools, universities, and colleges.

Kerala is internationally recognised for its strong public health performance, with key indicators such as an infant mortality rate of just five per 1,000 live births – better than the United States. Programmes such as the Aardram Mission and Karunya Arogya Suraksha Padisathi have improved the health infrastructure and provided cashless health coverage (up to ₹5 lakh) to over 42 lakh families. The State has expanded services to cover mental health, non-communicable diseases, and e-health. Kerala's handling of the Nipah outbreaks and the COVID-19 pandemic has

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demonstrated the strengths of the health system. In November 2025, the Government of Kerala fulfilled a historic promise to the people when it put an end to extreme poverty. The policy on housing for the poor – and the actual modern, safe, comfortable houses built for the poor – has set, as in other fields, new national standards. By February 2026, over five lakh houses were built under the LIFE Mission.

Women in Kerala have attained high levels of educational attainment, and the highest life expectancy in the country. These outcomes reflect sustained investments in education, health care, nutrition, and social security, complemented by pioneering institutional innovations such as Kudumbashree, which has emerged as a globally recognised model for women's collective empowerment, livelihoods, and local economic development. Child health is among the best in India, and the Gender Budget exceeds one-fifth of the Annual Plan outlay.

**Social Justice**  
Reflecting plan priorities, the new Elderly Budget, which takes up 19% of the State Budget for 2026-27, maintains senior citizens' needs across planning, pensions, health care, and local governance. Over 75% of the elderly are covered by pension schemes. Allocations to schemes for persons with disabilities have more than doubled between 2016 and 2026.

The Public Distribution System (PDS) operates as a near-universal safety net, covering nearly 95 lakh ration card-holding households. The State actively intervenes in markets through its civil supplies network in order to maintain low food-price inflation well below the national average.

Human development gains have been used as a springboard for economic growth, with in the primary sectors, in industry, infrastructure, and in modern services (including information technology and tourism) has been unprecedented.

The long-held perception that Kerala is unfriendly to industrial growth has been laid to rest. Industry in Kerala has been placed on a new trajectory, driven by the growth of MSMEs and modern industries, the expansion of industrial infrastructure, higher levels of value addition, a turnaround in the performance of public sector undertakings, and modernisation of traditional sectors.

In 2016, commentators said that Kerala had missed the IT bus. In 2025, however, the Global Startup Ecosystem Report reported a 147% increase in investable value in Kerala. Pioneering initiatives, such as recognising Internet access as a basic right and establishing K-FON, have played a significant role.

In an international context in which workers' rights are being undermined, there has been a continuous effort in Kerala to strengthen labour law in favour of workers, including migrant workers. Kerala's policies are a vital

counter narrative to the broader trend of deregulation.

Roads remain the backbone of mobility, and major corridor projects like the Hill Highway, alongside rapid four-laning of National Highways, have significantly reduced travel time and strengthened east-west and last-mile connectivity. The Kochi Metro is now operating at scale, while the Kochi Water Metro, India's first of its kind, has demonstrated the viability of clean inland water transport. The commissioning of the Vizhinjam International Deep-Water Seaport in 2024 marked a historic milestone. The road transport corporation has stabilised and improved performance. The State achieved full electrification in 2017 and has since maintained uninterrupted power supply, while reducing technical and commercial losses. Total installed capacity expanded by 50%, with solar power emerging as the most dynamic segment.

Kerala has emerged as a national and international reference point in disaster management, demonstrating effectiveness with respect to immediate and decentralised disaster response and long-term recovery.

Public investment in culture rose sharply, with allocations for culture, museums, archaeology, and heritage recording a 30% increase in 2026-27. The International Film Festival of Kerala, Kochi Muziris Biennale, International Theatre Festival of Kerala, and IBSPI expanded in scale and global reach. Plan outlays for sports rose by nearly 160% between 2016-17 and 2026-27, backed by over ₹3,500 crore for infrastructure, including India's first stadium for persons with disabilities.

**Fiscal constraint**  
Kerala's capacity to finance development is constrained by a structurally imbalanced federal fiscal architecture. This imbalance has been reinforced through multiple channels: the centralisation of taxation under the Goods and Services Tax (GST), the withdrawal of assured GST compensation, restrictive borrowing limits, and a growing reliance on conditional and discretionary transfers. The effective share of States in Union tax revenues has been eroded by the expanding use of cesses and surcharges outside the divisible pool, while unconditional Finance Commission transfers have been progressively supplanted by Centrally Sponsored Schemes characterised by rigid design, delays, and partial releases. Together, these developments have weakened the principles of cooperative federalism, reduced fiscal predictability, and narrowed the policy space available to Kerala to sustain public investment alongside their social and development commitments.

Over this decade, the Government of Kerala has sought to create and to present to India and the world a democratic, socially inclusive, participatory, high-growth, and sustainable alternative development policy. That effort must not be permitted to falter.

- Universal school education with zero dropout (elementary level).
- First fully digital school education State.
- Social Welfare Near-universal Public Distribution System (PDS).
- 75% elderly covered under pensions.
- Gender Budget >20% of plan outlay.
- Health & Social Security Karunya Arogya Suraksha Scheme (₹5 lakh coverage).
- Strong response to Nipah and COVID-19.
- Women Empowerment Kudumbashree model for livelihoods and local governance.
- High female literacy and life expectancy.
- Governance Innovations Decentralised planning through local governments.
- Internet access recognized as a basic right (K-FON initiative).
- Fiscal Constraints Reduced fiscal autonomy due to:

- GST centralisation
- Decline in divisible pool share (cess/surcharge rise)
- Conditional transfers and borrowing restrictions

## KEY HIGHLIGHTS

### Context of the News

- Kerala has witnessed rapid economic and social development (2016–2026) despite fiscal constraints imposed by the Union framework.
- The State has sustained a formal planning process even after the dissolution of the Planning Commission.
- Major initiatives include KIIFB-funded infrastructure projects, Kerala Bank consolidation, and welfare expansion.
- Kerala claims to have eliminated extreme poverty (2025) and strengthened human development indicators significantly.
- Concerns remain regarding fiscal federalism, GST regime constraints, and borrowing limits.

### Key Points

- Economic Growth Growth rates comparable or higher than national average.
- Expansion across primary, secondary, and tertiary sectors.
- Rise of MSMEs, IT ecosystem (147% increase in value).
- Infrastructure Development Over 1,200 projects via KIIFB.
- Major projects: Vizhinjam Port, Kochi Metro, Water Metro.
- Improved connectivity through highways and electrification.
- Human Development Infant Mortality Rate: ~5 per 1,000 (global standards).

### Static Linkages

- Directive Principles promoting welfare state and social justice
- Concept of cooperative federalism
- Role of Finance Commission and fiscal transfers
- Importance of human capital (education & health) in development
- Decentralisation via local self-government institutions
- Public Distribution System as food security mechanism
- Inclusive growth and social sector expenditure

### Critical Analysis

#### Pros

- High human development indicators
- Strong social security system
- Effective decentralised governance
- Balanced growth with inclusion

#### Cons

- Rising public debt and fiscal stress
- Dependence on welfare-driven expenditure
- Limited heavy industrial base
- Constraints from central fiscal policies

### Way Forward

- Ensure fiscal sustainability & transparency
- Boost industrialisation and private investment
- Strengthen cooperative federalism
- Promote innovation-led growth sectors
- Rationalise welfare spending

# Iran may be losing the battles, but it might still win the war

President Donald Trump's address to the nation on the war with Iran on April 1 was brief and offered little that was new. There was anticipation that he might announce either a major escalation – such as a ground war – or declare victory and a ceasefire. Neither happened. Instead, he justified the U.S. strikes as aimed at eliminating Iran's ability to acquire nuclear weapons and project power beyond its borders. He also stated that regime change was not his goal. He claimed that Iran's capabilities were mostly destroyed and that he would target Iran's industrial and power infrastructure. Along with regime change he has now abandoned the freeing of the Strait of Hormuz.

**Iran remains resilient**  
Contrary to Mr. Trump's claims, it is clear that Iran is neither on the verge of collapse nor prepared to concede. On the contrary, Tehran has demonstrated that it retains multiple instruments of retaliation, and the capacity to escalate horizontally – striking back against U.S. and its regional adversaries while blocking 25% of the global supply of oil and gas.

From the outset, this writer has argued, in the global media, that the U.S. and Israel will most certainly secure tactical victories. They will be able to degrade Iran's military capabilities and its industrial capacity, and even kill many Iranians, but they would struggle to achieve their broader strategic objectives. These goals – particularly regime change – are unattainable without a large-scale ground invasion that could cause huge American casualties.

Several respected voices reinforce this assessment. Sir Alex Younger, former head of MI6, Ross Harrison of the Middle East Institute, and former Central Intelligence Agency Director John Brennan have all warned that while the U.S. may achieve tactical successes, there is no clear pathway to strategic victory.

Four key factors help explain why Tehran is outperforming expectations in this conflict.



**Morteza Khan**  
Professor of International Relations at the University of Delaware, a Senior Non-Resident Fellow at the Middle East Policy Council, and the host of the YouTube channel, 'Strategic Insights', on global affairs

The U.S. and Israel appear to be struggling strategically, as Iran demonstrates resilience and retaliatory capacity

The first is regime resilience and strategic consolidation. The Iranian regime has demonstrated a level of resilience that was significantly underestimated by Israeli and American planners. It has been reported that Israel's Prime Minister Benjamin Netanyahu had persuaded Mr. Trump that the regime was very weak and that a massive decapitating attack would trigger a popular uprising and topple it within weeks. Yet, the Iranian regime is surviving, and its most powerful element, the Islamic Revolutionary Guard Corps (IRGC), which functions as both the sword and the shield of the Islamic Republic, has consolidated its hold over Iran's political and military apparatus. By hiding military assets and delegating operational authority down the chain of command, Iran has survived the decapitation strategy. Moreover, by assassinating leaders such as Ali Larjani, Israel has sidelined moderates and empowered hardliners such as Mojtaba Khamenei.

The second is horizontal escalation and economic leverage. Iran has demonstrated the ability to expand the conflict horizontally. Tehran's response to the attack has been to regionalise the war by targeting U.S.-aligned Arab states. Key civilian energy infrastructure has been damaged, tourism has suffered, and their sense of safety has been shaken. By choking the traffic through the Strait of Hormuz, Iran has constrained the global supply of oil and gas, triggering inflationary pressures across the global economy. If these conditions continue to prevail, several Asian economies that depend on the Gulf for energy will face severe economic hardship.

The third is strategic miscalculation in Washington. The growing confusion about the purpose and conduct of the war in Washington is also why Iran is enjoying the upper hand. By privileging Mr. Netanyahu's exhortations over the net assessments of America's own intelligence agencies, Mr. Trump overestimated the effectiveness of air power and underestimated Iran's capacity to endure sustained pressure. It is

becoming apparent that pre-war Israeli intelligence was wrong. A recently reported tense phone call between U.S. Vice-President J.D. Vance and Mr. Netanyahu underscores this point, revealing internal U.S. frustration and a growing recognition within the Trump administration that it was manipulated by Israel into this war.

The fourth is allied reluctance and regional blowback. The U.S. is increasingly isolated, with both its allies and regional partners refusing to join its war effort. America's North Atlantic Treaty Organization (NATO) allies have largely treated this as solely Washington's war. Meanwhile, the U.S.'s partners in the Gulf are deeply uneasy, having allowed American forces to operate from their territory, they now find themselves exposed to Iranian retaliation. Iran's ability to exert pressure through threats to energy flows and regional stability has given Tehran significant leverage and strategic confidence. Regional states are also signalling declining confidence in the U.S. and exploring alternative pathways such as the Islamabad quadrilateral dialogue (Pakistan, Türkiye, Saudi Arabia and Egypt) to end war.

**Tactical losses, strategic advantage**  
The superior military power of the U.S. and Israel will continue to deliver tactical victories and inflict damage on Iran and its people. However, Iran continues to resist and retaliate. The longer the conflict endures, the more economic strain, global instability, and declining domestic support will weigh on Washington. Iran is simultaneously regaining economic breathing space through oil exports and earning strategic respect across parts of the Global South. If negotiations actually happen, Tehran is likely to enter them with greater confidence and leverage.

If the Iranian regime survives, even a battered and weakened Iran would declare victory – because Mr. Trump's stated goal was unconditional surrender and regime change, and that appears increasingly unlikely.

- Global & Regional Dynamics NATO allies reluctant to fully support U.S. actions.
- Gulf countries vulnerable to retaliation despite hosting U.S. bases.
- Emerging alternative diplomatic platforms (e.g., regional groupings).
- Economic Implications Oil price volatility → Inflationary pressures globally.
- Asian economies (India, China, Japan) highly exposed.

## KEY HIGHLIGHTS

### Context of the News

- Donald Trump addressed the nation (April 1) regarding the ongoing U.S. military strikes on Iran, justifying them as efforts to curb Iran's nuclear and regional power ambitions.
- No announcement of escalation (e.g., ground invasion) or ceasefire; ambiguity persists in U.S. strategy.
- Iran has demonstrated resilience despite sustained attacks, retaining capacity for retaliation and escalation.
- The conflict has widened regionally, impacting energy infrastructure and global oil supply chains, particularly through the Strait of Hormuz.
- Global concerns rise over economic instability, geopolitical fragmentation, and prolonged conflict dynamics.

### Key Points

- Strategic vs Tactical Outcomes U.S. may achieve tactical military success but lacks a clear pathway to strategic victory.
- Regime change in Iran unlikely without large-scale ground invasion.
- Iran's Strategic Advantages Strong institutional backing by Islamic Revolutionary Guard Corps (IRGC).
- Decentralised command structure ensures survival despite targeted strikes.
- Ability to conduct horizontal escalation across West Asia.
- Energy Geopolitics Strait of Hormuz handles ~20–25% of global oil trade (Energy security concern).
- Disruption triggers inflation and impacts energy-importing countries like India.

### Static Linkages

- Strait of Hormuz as a critical choke point in global trade routes
- Balance of Power theory in international relations
- Concept of Proxy Wars in West Asia
- Nuclear Non-Proliferation Treaty (NPT) framework
- Role of OPEC in global oil markets
- India's energy import dependency (~85% crude oil imports)
- Principles of Just War and sovereignty

### Critical Analysis

#### Positives

- Curtails nuclear proliferation risks
- Reinforces deterrence

#### Negatives

- No clear end-goal → prolonged conflict
- Strengthens hardliners in Iran
- Global oil shocks → inflation

#### Challenges

- Escalation into regional war
- Energy supply disruption
- Weak multilateral diplomacy

### Way Forward

- Revive nuclear diplomacy (JCPOA-type framework)
- Ensure maritime security in Hormuz
- Diversify energy sources (India focus)
- Promote multilateral conflict resolution

## Fear of the foreign

The FCRA amendments are unfair in principle and procedure

The Centre wants to restrict foreign contributions to individuals and organisations in India, but intends to do so in a selective and opaque manner. A fresh set of amendments to the Foreign Contribution (Regulation) Act, or FCRA, now temporarily stalled due to protests, is an attempt by the Centre to empower itself to arbitrarily take control of assets owned by recipients of foreign contributions. Introduced in the Lok Sabha on March 25, 2026, the Bill to amend the FCRA proposes a comprehensive statutory framework for a new “designated authority” to seize, manage, and dispose of assets of organisations that lose their FCRA licence. Cloaked in the rhetoric of national security and foreign interventions, the move smacks of bad faith, or even worse, a devious scheme to snatch assets built through legal means. Once an FCRA registration ceases to exist, the designated authority can take control of assets built using foreign funds – schools, hospitals, places of worship – and use them. This process is proposed to be automatic and instantaneous upon the discontinuation of the FCRA status, requiring no judicial determination or adjudicatory process. In effect, the Centre that grants FCRA permission can decide to withdraw that permission, and benefit from its own decision. This is unfair in both principle and procedure, and Christian groups that run numerous health and educational institutions are particularly concerned, given that they may have received contributions from abroad.

The Bill has been postponed for now, but the government has no plans to abandon it. The FCRA was first enacted in 1976, and reenacted in 2010 during the UPA regime and amended in 2020 under Narendra Modi – progressively tightening the receipt and use of foreign funds. It is notable that state policy seeks foreign money in a range of domains – from infrastructure to technology, and entertainment to real estate. Regulatory regimes can be credible only when they are transparent and even-handed. That is not the case with the FCRA restrictions. Rajya Sabha MP John Brittas said his parliamentary questions regarding FCRA cancellations, non-renewals, and related data had been disallowed since 2024. That leaves one with the reasonable assumption that the government allows only some to receive foreign funds. That built-in favouritism apart, the design of the proposed legislation violates the principles of natural justice. The assets built legally with foreign funds before an organisation loses its FCRA clearance cannot justly be subject to seizure under any subsequent regulatory action. The Centre must rethink its approach on this issue and ensure that any regulations on foreign funds it introduces are fair, transparent, and steer clear of what exists on the ground.

## KEY HIGHLIGHTS

### Context of the News

- The Union Government introduced amendments to the Foreign Contribution (Regulation) Act, 2010 in the Lok Sabha on March 25, 2026.
- The Bill proposes creation of a “designated authority” to take control of assets of organisations whose FCRA registration is cancelled or lapses.
- The move has faced criticism from civil society, NGOs, and opposition leaders for being opaque and arbitrary.
- The Bill has been temporarily stalled due to protests, but not withdrawn.
- Concerns have been raised especially by organisations involved in education, healthcare, and religious services.

### Key Points

- Designated Authority:
  - Empowered to seize, manage, and dispose of assets created using foreign funds.
  - Applies once FCRA licence is cancelled or not renewed.
- Automatic Asset Transfer:
  - No requirement of judicial determination or adjudicatory process.

- Immediate takeover raises due process concerns.
- Expansion of Executive Power:
  - Government both grants and revokes FCRA registration, creating potential conflict of interest.
- Evolution of FCRA:
  - 1976: Original Act (Emergency era context).
  - 2010: Re-enacted with stricter compliance norms.
  - 2020: Amendments tightened restrictions (e.g., ban on sub-granting, Aadhaar requirement).
- Opacity Concerns:
  - Lack of transparency in cancellation/non-renewal data.
  - Parliamentary oversight allegedly limited.
- Selective Regulation Allegation:
  - Claims of uneven application of rules across organisations.

### Static Linkages

- Rule of Law requires equality before law and non-arbitrariness (Art. 14).
- Right to form associations under Art. 19(1)(c) (subject to reasonable restrictions).
- Doctrine of Natural Justice: audi alteram partem (right to be heard).
- Separation of powers and need for judicial review.
- Concept of eminent domain vs private property rights (Art. 300A).
- Role of civil society in welfare state functions.
- Regulatory governance must ensure transparency and accountability (2nd ARC).

### Critical Analysis

#### Arguments in Favour

- Prevents misuse/diversion of foreign funds.
- Strengthens national security framework.
- Ensures regulatory control over NGOs.

#### Arguments Against

- Violates natural justice (no hearing).
- Enables executive overreach.
- Risk of selective targeting.
- Undermines civil society functioning.
- Reduces transparency and accountability.

### Way Forward

- Introduce mandatory judicial/quasi-judicial oversight.
- Ensure transparent criteria for cancellation.
- Publish FCRA-related data regularly.
- Balance security concerns with democratic freedoms.
- Strengthen institutional accountability mechanisms.

# US, China are recalibrating ties.

## Five ways India must respond

AS THE world remains fixated on the Iran war, significant changes in the US-China rivalry, and their implications for India, are less in the limelight. Donald Trump's presence as a disruptive force and Xi Jinping's reputation as an exceptionally consequential leader obscure a deeper truth: The global order is being reshaped not only by the decisions of individual leaders but by structural forces that will outlast them. Trump is a symptom, product and catalyst of broader shifts in American political and strategic thinking. The challenge posed by China is rooted in long-term ambitions, accumulated capabilities, and national narratives that will persist beyond Xi's tenure.

For India, this means the strategic challenges it faces are not passing clouds that will dissipate with leadership changes in Washington or Beijing.

For much of the past decade, Washington framed its relationship with Beijing as great-power competition, placing the Indo-Pacific as the pivotal theatre. In the second Trump administration, China is being seen primarily as an economic competitor rather than a systemic rival. The Western Hemisphere has been elevated above Asia as the centrepiece of US strategy, ideological rivalry has been downplayed, and transactional bargains with Beijing have been foregrounded.

Washington and Beijing now share an interest in maintaining a degree of stability in their relationship—though for different reasons. The US seeks to manage competition while attending to domestic economic and political priorities amid a profound strategic recalibration involving alliances, trade, industrial policy, and global commitments. China seeks stability to deal with economic headwinds, complete its technological self-reliance drive, and buy time in

the domains in which it lags. The result is a relationship less confrontational in tone but no less competitive in substance—its equilibrium increasingly favours Beijing.

The Iran war has exposed an uncomfortable truth: The US is not merely recalibrating. It is becoming less predictable, more militarised, and increasingly erratic in its diplomacy. China's response—calling for a ceasefire, avoiding entanglement, and investing international law—stands in sharp contrast. The result is a subtle but important shift in perception: China appears resolute and restrained; the US appears impulsive.

China was well-prepared for the energy shock triggered by the war. It has diversified crude and gas imports, built the world's largest strategic petroleum reserve, pursued the fastest electrification programme globally, and dominates solar, wind, EV, battery, and green-tech supply chains.

The conflict has accelerated the global transition from petrostates to electrostates. China, with its dominance of the renewable energy space, is well-placed to benefit as the Iran war makes fossil fuels riskier. The US, doubling down on fossil-fuel geopolitics, finds its structural leverage increasingly outdated in comparison.

These shifts converge to squeeze India's strategic space in ways that must be honestly reckoned with.

The utility of external balancing of China through the US has diminished. Washington remains committed to preventing Chinese hegemony in Asia, but it is a distracted great power, less willing to accommodate India as a strategic counterpoise to China. A more transactional US-China relationship raises the possibility of deals struck over India's head. Chinese analysts



ASHOK K KANTHA

argue that India's interest in improved relations with China derives from turbulence in India-US ties—a reading that reduces Beijing's incentive to offer meaningful concessions. India's salience has declined in both capitals, exposing a strategic vulnerability.

Compounding this picture, the global AI landscape is moving toward bipolarity. For valid strategic and security reasons, India cannot align with the China stack, but exclusive reliance on US foundational models also carries risks.

The US-Pakistan thaw adds a further complication. Trump is susceptible to aggrandisement by Pakistan. The change is limited and tactical, but it gives Pakistan renewed leverage. The China-Pakistan nexus remains unaffected.

India's response to this complex environment must be steady, resilient, and anchored in long-term capability building.

The first imperative is to recalibrate expectations from external balancing. India must deepen selective cooperation with the US on defence modernisation, maritime domain awareness, and critical technologies, while moderating expectations in conflict situations.

Two, India should engage China in more substantive strategic conversations with guarded realism. The two-track approach—addressing border-related issues firmly while pursuing calibrated improvement in the broader relationship—must continue without morphing into a search for contrived progress. China's proposal for an "early harvest" in boundary negotiations, limited to Sikkim, must be resisted. India must be firm on the principle that peace along the line of actual control (LAC) is a prerequisite for broader normalisation, deny China salami-

slicing along the LAC, and proactively explore a more balanced economic engagement with China. Given the widening capability gap, deterrence must be asymmetric and include quid-pro-quo options. Sustained investment in border infrastructure, cyber resilience, and jointness of the three services is not optional but essential.

Three, India has to build economic and technological resilience through dual de-risking, vis-à-vis both China and the US. Reducing dependencies on China in critical inputs is a strategic imperative, as is avoiding the creation of new dependencies on the US in domains like AI. India must invest in its own sovereign AI stack and green energy ecosystem.

Four, India must not succumb to the illusion of "middle-power coalitions". Middle powers hedge, balance, and bandwagon; they do not set the rules. India is not a great power yet, but it shouldn't identify itself as a middle power either.

Fifth, India urgently needs a reimagined Neighbourhood First Policy and reinvigoration of the Act East Policy. The world to India's west is rightly getting more attention, but that must not be at the expense of strategic prioritisation of its neighbourhood or geography to its east.

India has to assess trends, anticipate and prepare for crises (as China did for Trump's tariffs of last year and the energy crisis now) and avoid strategic crutches. This involves engaging when possible, deterring when necessary, and building indigenous military, economic, technological, and algorithmic capabilities.

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Reducing dependencies on China in critical inputs is a strategic imperative, as is avoiding the creation of new dependencies on the US in domains like AI. India must invest in its own sovereign AI stack and green energy ecosystem

## KEY HIGHLIGHTS

### Context of the News

- The evolving dynamics of United States–China relations are undergoing structural transformation beyond leadership personalities.
- The U.S. is recalibrating its strategy—shifting focus from ideological rivalry to economic competition and prioritising domestic concerns and the Western Hemisphere.
- China is leveraging stability to strengthen technological self-reliance, renewable energy dominance, and global supply chain leadership.
- The ongoing West Asian conflict (Iran war) has exposed U.S. unpredictability and enhanced China's image as a restrained actor.
- These developments are shrinking India's strategic space and complicating its foreign policy choices.

### Key Points

- U.S.–China relations are becoming less confrontational in tone but competitive in substance.
- The Indo-Pacific may lose primacy in U.S. strategy; transactional diplomacy may increase.
- China has:
  - Diversified energy imports
  - Built large strategic petroleum reserves
  - Dominated renewable and green-tech supply chains
- Global transition: Petrostates → Electrostates (renewable-driven geopolitics).
- India faces:
  - Reduced salience in both Washington and Beijing

- Risk of U.S.–China deals affecting its interests
- Growing technological dependence risks (AI, supply chains)
- Emergence of bipolar AI ecosystem dominated by U.S. and China.
- Continued strength of China–Pakistan nexus with tactical U.S.–Pakistan thaw.

### Static Linkages

- Balance of Power theory in international relations
- Strategic autonomy in foreign policy
- Energy security and diversification (Economic Survey insights)
- Non-alignment vs multi-alignment evolution
- Concept of deterrence (asymmetric warfare)
- Globalisation vs de-risking and supply chain resilience
- Renewable energy transition and climate commitments (Paris Agreement)
- Role of strategic petroleum reserves

### Critical Analysis

#### Pros

- Opportunity for India as an independent pole
- Renewable transition benefits India

#### Cons

- Reduced importance of India globally
- Risk of U.S.–China strategic deals
- Technological dependence risks
- China's dominance in green tech

#### Challenges

- Managing LAC tensions
- Bridging tech gap
- Maintaining neighbourhood influence

### Way Forward

- Build indigenous tech & AI ecosystem
- Ensure dual de-risking strategy
- Strengthen defence and border infrastructure
- Deepen selective global partnerships
- Revive Neighbourhood First & Act East
- Invest in renewables and supply chains

# The viral video and the crime in perpetuity



CHITRANGADA SHARMA

**T**HE HORRORS of the Prajwal Revanna case are still fresh in public memory as we are again faced with reports of impunity at play. The recent arrests of Nashik "godman" Ashok Kumar Kharat and that of Sohani son of a Goa councillor, expose how men use proximity to power to prey on vulnerable women. In all three cases, the videos of sexual abuse became viral, leaving victims traumatised. One must ask what it is about these viral images of abuse that contributes to the trauma of victims and why we should take them seriously.

The violence of sexual abuse exists on a continuum and is not limited to the physical act of rape. It also extends to the act of recording the abuse and then circulating it online. The violation of a victim's consent, agency, privacy and bodily autonomy happens in all three stages and hence the violence of recording and circulating rape videos cannot be trivialised. The abuse continues and is reperformed online, each time the video is clicked and shared, thereby making them "crimes in perpetuity". In 2018, the sessions court decision in *State of West Bengal vs Animesh Boxi* highlighted this insidious aspect of abuse and recognised it as "virtual rape".

While these videos are voyeuristically consumed by viewers, they are a permanent reminder of humiliation for victims. The circulation of these videos has a chilling effect, forcing victims into isolation and silence. Many women are reluctant to complain about sexual abuse, fearing the risk of identification by society and at times by their own families.

The social stigma of rape and the risk of ostracisation only adds to their trauma. Out of approximately 100 victims identified in the sexual abuse videos allegedly recorded by former MP Revanna, only four filed a formal complaint. Many family members learned about the abuse from neighbours who had seen these videos. The unwarranted exposure compelled many families to relocate to different cities.

The online circulation of these videos also creates conditions of further harm for victims, exposing them to sexist trolling, rape threats, doxing and endangerment of physical safety. The internet therefore becomes another hostile space that mimics the inequalities of the offline world.

The criminal legal system further reinforces the victim's trauma through secondary victimisation. Women's complaints of rape and digital violence are often met with disbelief by the police, who then refuse to register FIRs. On the rare occasion that a complaint does reach the courts, women are often exposed to humiliating questions about past sexual history by the defence counsels. The defence offers interpretations of the videos that cast the sexual violence as consensual encounters, converting the victim's traumatic experience of rape into a sexual escapade. Instead of the perpetrators being held accountable, victims get blamed for what is done to them.

In recent years, high courts in India have started issuing John Doe orders against nameless entities to address the virality of sexual abuse imagery, giving injunctions with respect to existing and future uploads of the same imagery on different websites. Although this is a laudable initiative, it only happens when victims themselves approach the court with a list of websites on which the imagery is circulating.

The effectiveness of the court's order also relies on the victims' labour of constantly looking for videos of their abuse to resurface, which results in retraumatisation. How does one then ensure the victim's right to be forgotten? Can one imagine a more trauma-informed way of assisting victims? Can there be any alternatives to the legal process itself or perhaps a more therapeutic application of law that focuses on protecting victims from such "crimes in perpetuity"? These are questions we are yet to find answers to.

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- Judicial innovations:
  - Recognition of virtual rape
  - Use of John Doe orders for content removal

## Static Linkages

- Article 21 – Right to life includes dignity, privacy (expanded in Justice K.S. Puttaswamy vs Union of India)
- Article 14 & 15 – Equality and protection against discrimination
- Information Technology Act, 2000:
  - Section 67, 67A – Punishment for publishing/transmitting obscene material
- Indian Penal Code (IPC):
  - Section 376 – Rape
  - Section 354C – Voyeurism
- Criminal Law (Amendment) Act, 2013 – Expanded definition of sexual offences
- NCERT (Sociology) – Patriarchy, gender inequality, stigma
- ARC Reports – Emphasis on citizen-centric and sensitive policing

The circulation of these videos has a chilling effect, forcing victims into isolation and silence

## KEY HIGHLIGHTS

### Context of the News

- Recent cases involving sexual abuse and circulation of explicit videos (e.g., allegations linked to Prajwal Revanna, Nashik godman, Goa councillor's son) have sparked national concern.
- Viral circulation of abuse videos has intensified trauma for victims, raising questions on digital sexual violence.
- Judicial recognition of "virtual rape" in *State of West Bengal vs Animesh Boxi* highlighted that recording and circulation of sexual abuse is an extension of the crime.
- Increasing use of John Doe orders by courts to curb online dissemination of such content.

### Key Points

- Sexual violence extends beyond physical assault to recording and online dissemination.
- Circulation of abuse videos leads to:
  - Violation of privacy, dignity, and bodily autonomy
  - Perpetual trauma ("crimes in perpetuity")
  - Social stigma, isolation, and underreporting
- Digital platforms amplify harm through:
  - Trolling, doxing, rape threats
  - Permanent digital footprint
- Legal challenges:
  - Reluctance of police to register FIRs
  - Victim-blaming during trial
  - Burden on victims to track and report content

## Critical Analysis

### Positives

- Judicial recognition of digital dimension of sexual violence
- Use of John Doe orders to curb anonymity online
- Growing discourse on right to be forgotten

### Concerns

- Legal framework still reactive, not preventive
- Burden of proof and action lies disproportionately on victims
- Weak enforcement by police and intermediaries
- Persistent patriarchal attitudes in investigation and trial
- Cross-border nature of internet complicates regulation

### Stakeholder Issues

- Victims: trauma, stigma, lack of support
- State: enforcement gaps, capacity issues
- Digital platforms: accountability vs free speech debate
- Society: voyeurism and moral failure

## Way Forward

- Enact clear legal framework on "right to be forgotten"
- Strengthen intermediary liability under IT rules
- Establish fast-track cyber forensic units
- Ensure gender-sensitive policing and judicial processes
- Promote digital ethics awareness and accountability
- Provide psychological and legal aid support systems for victims
- Develop AI-based proactive detection and takedown systems

# Pressure on rupee goes beyond the current crisis



AASHI GUPTA

**T**HE RUPEE hitting record lows has drawn renewed attention. From 45.9 per US dollar in January 2010 to over 95 in March 2026, it has depreciated at an average annual rate of 4.6 per cent over the past 16 years. India runs a goods trade deficit, relies heavily on imported energy, and depends on capital inflows to finance this gap. Over time, these structural features tend to be reflected in the exchange rate. While the drivers of a currency's movement are well understood, the manner in which this adjustment takes place warrants closer attention. In Brazil or South Africa, currency pressure has been accompanied by tighter monetary policy, often at the cost of demand. In contrast, there are countries in East Asia where sustained exports have helped reduce external imbalances.

India's experience has been different. The rupee has been allowed to adjust, but in a gradual manner. The central bank has intervened to contain volatility, without targeting any specific exchange rate level. But the scale of external pressure on the rupee is too large to be offset through intervention alone. Since 2022, there have been phases where the central bank has been a net seller of dollars. Over the same period, the rupee has continued to weaken. The coexistence of sustained dollar sales and a depreciating exchange rate underscores a constraint: intervention can smoothen volatility and influence the pace of adjustment, but it cannot offset persistent and large external imbalances.

Movements in the rupee track closely the combined behaviour of oil prices and capital flows. The sharp increase in Brent crude from around \$70 per barrel in early 2021 to over \$116 by mid-2022 translated into a higher import bill. Capital flows turned volatile, with visible episodes of net outflows. Tensions in West Asia have pushed oil prices up, reinforcing these pressures. Thus, pressure on the rupee has been persistent and multi-sided. Elevated oil prices have structurally increased India's external financing requirement, while the volatility of capital flows has made that requirement harder to meet on stable terms.

This supports near-term stability but leaves the underlying sources of external imbalance largely unchanged. The merchandise trade deficit has doubled to \$27.1 billion in February 2026 from \$14.4 billion in February 2025. Capital flows remain volatile, with net FDI turning negative due to high repatriation, while portfolio outflows dominate. Energy dependence remains elevated. Export concentration persists, with a limited set of products and markets accounting for a large share. The question is whether the economy should continue to depend on the exchange rate as the balancing variable. A more durable adjustment would come from gradual but sustained structural changes in trade and production. This would include a boost to manufacturing, greater export diversification, a rebalancing of capital inflows toward more stable FDI, and a reduction in energy dependence through domestic production, renewables, and efficiency improvements.

*The writer is associate fellow, CSEP. Views are personal*

Elevated oil prices have structurally increased India's external financing requirement, while the volatility of capital flows has made that requirement harder to meet on stable terms

## KEY HIGHLIGHTS

### Context of the News

- The Indian rupee has crossed the ₹95/\$ mark in March 2026, hitting record lows.
- Over the past ~16 years, the rupee has depreciated at an average annual rate of ~4.6%.
- Persistent current account pressures due to high import dependence (especially energy) and trade deficit.
- Rising global crude oil prices and geopolitical tensions (West Asia) have intensified external vulnerabilities.
- Capital flows (FDI and FPI) have turned volatile, with phases of net outflows.
- The Reserve Bank of India has intervened in forex markets to smooth volatility but not to fix a target exchange rate.

### Key Points

- India runs a structural trade deficit, with merchandise trade deficit rising to \$27.1 billion (Feb 2026) from \$14.4 billion (Feb 2025).
- Heavy reliance on imported crude oil increases vulnerability to global price shocks.
- Capital inflows are unstable:
  - Net FDI turning negative due to repatriation.
  - Portfolio flows (FPI) showing volatility and outflows.
- RBI intervention:

- Acts as a buffer against volatility, not against long-term depreciation.
- Has been a net seller of dollars since 2022 in some phases.
- Exchange rate acts as a shock absorber for external imbalances.
- Export base remains narrow and concentrated, limiting resilience.

### Static Linkages

- Exchange rate determined by demand and supply of foreign exchange (NCERT Macroeconomics).
- Balance of Payments (BoP) identity: Current Account + Capital Account = Overall Balance.
- Persistent Current Account Deficit (CAD) leads to currency depreciation pressure.
- Role of foreign exchange reserves in stabilizing currency (RBI reports).
- Elasticity approach & Marshall-Lerner condition for trade balance adjustment.
- Energy security linked to import dependence (~85% crude oil) (Economic Survey).
- Managed float exchange rate system followed by India.

### Critical Analysis

#### Positives

- Improves export competitiveness
- Helps adjustment of BoP
- Acts as automatic stabilizer

#### Negatives

- Imported inflation (fuel, fertilizers)
- Higher CAD in short term
- External debt burden increases
- Investor sentiment weakens

#### Challenges

- High energy import dependence
- Export concentration
- Volatile capital flows (FPI dominance)
- Limited effectiveness of RBI intervention

### Way Forward

- Diversify exports (products + markets)
- Promote manufacturing (PLI schemes)
- Shift toward stable FDI inflows
- Reduce oil dependence (renewables, green hydrogen)
- Strengthen forex reserves
- Improve logistics & competitiveness

# In Bengal, EC needs another prod from SC

WITH ONLY days to go before the electoral rolls are frozen ahead of the contest for West Bengal, a silence and a furore point to an election in which lakhs of voters are still in the dark. This week, the gates of the Syama Prasad Mookerjee National Institute of Water and Sanitation in Kolkata, the designated site for the 19 tribunals that are expected to begin hearings for voters deleted from the pending list of about 60 lakh voters stamped "under adjudication", remained closed on Day 1. Also this week, in Malda, protesters, angry over the deletion of their names from the electoral rolls after adjudication, gheraoed officials, holding them hostage for several hours. Both the silence that shrouds the building in Kolkata and the outpouring of anger on the Malda street illustrate an election in which many voters are dependent on a protracted decision-making that may not be completed or resolved before voting begins. Large numbers confront possible disenfranchisement because an over-long verification has mutated into a process of exclusion. For them, administrative delay could mean that the constitutional promise enshrined in Article 326 — that every eligible citizen shall be entitled to be a voter — will not be met.

The Election Commission, which has a storied past record of reaching out to each and every voter, and of erring on the side of voter inclusion, not exclusion, must address these urgent concerns. The Supreme Court, whose interventions during the EC's Special Intensive Revision of electoral rolls last year in Bihar helped to make the process more responsive to voter predicaments, must not take its eye off West Bengal. From the very beginning, the SIR in Bengal has seemed to be a more layered, or a more complicated, exercise than in other states. Several controversial new features were introduced amid a race against time. In December, the EC appointed 8,100 central government employees as micro-observers to help the Electoral Registration Officers, sparking apprehensions that the former would usurp the power of the EROs. In February, the Court, hearing a legal challenge to the SIR, ordered 500-odd judicial officers to decide the pending cases, without placing any deadline for the adjudication.

To be sure, West Bengal is a state where politicisation and partisanship have created trust deficits, and where it is all too easy to question the impartiality of the referee. Having said that, the EC's conduct has not assuaged concerns about a free and fair election, only sharpened them. In the days before the first phase of voting begins, the EC must recognise that it cannot afford to let these anxieties deepen. And the Court must step in to prod the election monitor, as it has done before.

## KEY HIGHLIGHTS

### Context of the News

- Electoral rolls in West Bengal are under revision ahead of elections, with ~60 lakh voters marked "under adjudication".
- Delay in tribunal hearings (set up in Kolkata) has left many voters uncertain about their status.
- Protests erupted in Malda after alleged deletions from electoral rolls.
- Concerns of large-scale disenfranchisement due to prolonged verification processes.
- Questions raised over the role of the Election Commission of India and judicial oversight by the Supreme Court of India.

### Key Points

- Article 326 guarantees universal adult suffrage (voting rights for all eligible citizens).
- Electoral roll revision conducted through Special Intensive Revision (SIR).
- Around 60 lakh voters under adjudication, risking exclusion before elections.
- Appointment of 8,100 central government employees as micro-observers raised concerns about federal neutrality.
- Deployment of judicial officers for adjudication without strict timelines has delayed resolution.

- Administrative delays may lead to de facto disenfranchisement.
- Trust deficit in electoral processes due to perceived politicisation.

### Static Linkages

- Article 324: Superintendence, direction, and control of elections vested in Election Commission.
- Article 326: Elections based on adult suffrage.
- Representation of the People Act, 1950: Preparation and revision of electoral rolls.
- Representation of the People Act, 1951: Conduct of elections.
- Concept of "free and fair elections" – part of Basic Structure (as per judicial interpretation).
- Electoral Registration Officer (ERO) – statutory authority for electoral rolls.
- Model Code of Conduct – ensures level playing field during elections.

### Critical Analysis

#### Issues

- Mass disenfranchisement risk
- Administrative opacity
- Trust deficit in electoral process
- Weak grievance redressal

#### Justifications

- Need to remove bogus/duplicate voters
- Ensuring electoral integrity

#### Core Conflict

- Integrity of rolls vs Inclusiveness of democracy

### Way Forward

- Time-bound disposal of voter disputes
- Transparent verification mechanisms
- Strengthen ERO accountability
- Tech-enabled roll management with safeguards
- Judicial monitoring in sensitive cases

# A new space age, next frontiers and challenges

THE LAST time humans headed toward the Moon was more than 53 years ago. None of the Artemis 2's crew members had been born. Unlike the astronauts of 1972, they will not set foot on Earth's only satellite. The Artemis mission, which took off on Thursday, does not aim to plant flags on the Moon or even leave footprints on it. The early lunar missions were part of a project of one-upmanship between the US and the Soviet Union. Artemis belongs to a different era in science and geopolitics. The Moon is today a frontier in Sino-US space competition. At the same time, Artemis represents a broader evolution in the global approach to space exploration. The mission is part of the eponymous accords, signed by more than 50 countries, including India, that set out common principles, guidelines, and best practices for safe space exploration.

The Artemis crew intends to conduct preparatory work for a mission in the next two years, which will explore the Moon's South Pole — deposits of ice here can provide drinking water and produce oxygen and hydrogen, which can then fuel rockets. The astronauts will test life-support systems and navigation abilities ahead of landing on the Moon, planned for 2028, two years ahead of China's target. The Moon is an archive of the solar system. Unlike Earth, whose surface is constantly being shaped by tectonic activity, weather and erosion, its satellite preserves billions of years of history. Studying it can give scientists a sense of what conditions were like in the solar system's past, helping them understand how habitable places like Venus and Mars might once have been. The Artemis mission thus envisages using the Moon as both a laboratory and a launchpad for other expeditions.

Its network of collaborators — national and global agencies, private companies, and universities — provides Artemis security against the whims of one administration. There is, however, a need to evolve a global consensus for responsible space exploration. The Artemis Accords do not establish mechanisms for dispute resolution, liability assessment, or mandatory compliance. Russia and China are not signatories. Different rules increase the risk of friction between missions. Space has enormous potential to enhance human welfare. It should not become a theatre for geopolitical rivalries.

## KEY HIGHLIGHTS

### Context of the News

- Artemis Program recently launched a crewed mission aimed at preparing for future human landing on the Moon.
- Unlike the Apollo Program, the current mission does not involve immediate lunar landing.
- The mission is part of the Artemis Accords signed by 50+ countries, including India.
- It reflects a shift from Cold War rivalry (USA–USSR) to emerging Sino-US competition in space.
- Focus is on Moon's South Pole exploration, especially water-ice deposits.

### Key Points

- Artemis aims to:
  - Establish sustainable human presence on the Moon.
  - Use lunar resources (water ice → oxygen + hydrogen fuel).
  - Develop technologies for future Mars missions.
- South Pole significance:
  - Permanently shadowed craters contain water ice (ISRO & NASA findings).
- Timeline:
  - Human landing targeted around 2028.
  - Competes with China's planned lunar missions.

- Artemis Accords:
  - Promote peaceful use, transparency, interoperability, and data sharing.
  - Non-binding framework (soft law).
- Multi-stakeholder model:
  - Collaboration between space agencies, private sector, academia.
- Moon as:
  - Scientific archive (unchanged surface → early solar system evidence).
  - Launchpad for deep-space missions.

### Static Linkages

- Outer Space Treaty, 1967:
  - Space is the “province of all mankind”.
  - No sovereignty claims allowed.
- Concept of Global Commons.
- Role of ISRO in lunar exploration (e.g., Chandrayaan-3).
- Cryosphere and water ice in extreme environments.
- Hydrogen as a clean fuel (Energy transition).
- International cooperation vs strategic rivalry in global governance.

### Critical Analysis

#### Pros

- Promotes international cooperation
- Boosts New Space economy (private sector)
- Enables long-term space exploration (Moon → Mars)
- Scientific understanding of solar system

#### Cons

- Artemis Accords:
  - No binding enforcement
  - No dispute resolution mechanism
- Exclusion of:
  - China
  - Russia
- Risk of:
  - Space militarisation
  - Resource competition
- Fragmentation of global space governance

### Way Forward

- Strengthen global space governance under UN framework
- Create:
  - Binding norms
  - Dispute resolution mechanisms
- Ensure inclusive participation (all space powers)
- Promote space as global commons
- India:
  - Leverage Artemis participation
  - Enhance ISRO capabilities & private sector role

# The significance of India's third nuclear submarine

The induction of INS Aridaman boosts India's ability to not only deter nuclear strikes but also respond in case of such an attack



AMRITA NAYAK DUTTA

INDIA INDUCTED its third nuclear-powered ballistic missile submarine (SSBN), INS Aridaman, on Friday, significantly strengthening its sea-based nuclear deterrence capabilities.

With INS Aridaman's induction, India will have three operational ballistic missile submarines at sea for the first time.

The indigenous SSBN (Ship Submersible Ballistic Nuclear) is designed to carry more long-range nuclear-tipped missiles than INS Aridaman and INS Arighaat, which were commissioned in 2016 and 2024, respectively.

The latest induction will also strengthen India's nuclear triad. India is part of a select group of countries with nuclear triad capabilities. These include the US, Russia, China, and France.

A nuclear triad refers to the ability to launch nuclear missiles from platforms in the air, land and at sea. In the case of India, such missiles (such as the Agni series) can be launched from land, and fighter aircraft such as the Rafales, Su-30MKIs, and Mirage 2000s can deliver nuclear warheads from the air.

Although India's nuclear doctrine stipulates a "no first use" policy — it is committed to using nuclear weapons only for deterrence and retaliation — SSBNs guarantee India's second-strike capability. Should an adversary deliver a first nuclear strike on India's land and air bases, an SSBN can launch a retaliatory nuclear attack, establishing deterrence.

## INS Aridaman

INS Aridaman, a 7,000-tonne vessel, is believed to have eight vertical launching system tubes — around double the number of its predecessors. This means it can carry more K-15 nuclear-capable submarine-launched ballistic missiles (SLBMs), which have a range of more than 700 km. They can also carry the longer-range K-4 SLBMs that can hit targets 3,500 km away.

## THE THREE ARIHANT-CLASS SUBMARINES

**INS Aridaman**  
Commissioned: 2016  
Firepower: K-15 Sagatika missiles, over 700-km range  
Vertical launch tubes: Four  
Displacement: 6,000 tonnes  
Powered by 83 MW pressurised light-water nuclear reactors

**INS Aridaman**  
Commissioned: 2026  
Vertical launch tubes: Believed to be eight  
Firepower: K-4 missiles with 3,500 km range  
More advanced reactors — understood to be an upgrade over the ones that power its predecessors  
Displacement: 7,000 tonnes

**INS Arighaat**  
Commissioned: 2024  
Similar in terms of power, launch tubes and displacement but much more technologically advanced than the Aridaman.  
Believed to support K-4 missiles with 3,500 km range in addition to K-15s

**TYPES OF NUCLEAR-POWERED SUBMARINES**  
**SSN (Submersible Ship Nuclear):** Carries conventional weapons.  
**SSBN (Ship Submersible Ballistic Nuclear):** Capable of carrying ballistic missiles that may be nuclear armed. Typically the largest and most complex type.

It is also powered by advanced reactors — understood to be an upgrade over the ones that power its predecessors — to ensure it can remain submerged for longer durations (months together) without needing to surface every few days.

A fourth SSBN is also currently under construction, and, like the Aridaman, will also be able to carry more K-4 missiles owing to its larger size.

## INS Arighaat and INS Arighaat

India's nuclear-powered submarine project was initiated more than three decades ago, involving both private firms and the Defence Research & Development Organisation, with help from Russia.

INS Arighaat was launched in 2009 and commissioned into the Navy in 2016 as its first nuclear-powered submarine. This provided India with a maritime strike capability for the first time.

INS Aridaman conducted its first deterrence patrol in 2018, thus establishing India's nuclear triad. In October 2022, the Ministry of Defence announced the successful launch, "with very high accuracy", of an SLBM in the Bay of Bengal by Arighaat.

## Nuclear triad

A nuclear triad refers to the ability to launch nuclear missiles from platforms in the air, land and at sea

India can launch nuclear missiles from the ground, from jets such as the Rafale, and from the three Arihant-class submarines

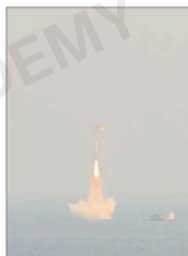
The induction of the 6,000-tonne INS Arighaat in 2024 was yet another boost to this nuclear strike capability.

Both INS Arighaat and INS Arighaat are powered by 83 MW pressurised light-water nuclear reactors, which allow it to remain submerged and undetected for much longer than conventional diesel-electric submarines. Among the two, INS Arighaat is significantly more technologically advanced than INS Aridaman, according to the Ministry of Defence.

The construction of Arighaat involved advanced design and manufacturing technology, detailed research and development, utilisation of special materials, complex engineering, and highly skilled workmanship, a statement from the government had noted.

## Future plans

India is pursuing a nuclear-powered attack submarine (SSN) programme. The Navy plans to build two SSNs indigenously and acquire one on lease from Russia, which is expected to arrive by 2027-28 and bridge the capability gap until India's own boats are ready.



An underwater missile test off the coast of Visakhapatnam. All three Arihant-class submarines can carry submarine-launched ballistic missiles. (R AICV)

- Enhances survivability due to stealth and mobility of submarines.
- Complements land-based (Agni missiles) and air-based (Rafale, Su-30MKI) delivery systems.
- Future Plans: Development of next SSBN with higher missile capacity.
- Indigenous SSN (attack submarine) programme underway.
- Project-75I for conventional submarines with AIP technology.

## KEY HIGHLIGHTS

### Context of the News

- India inducted its third nuclear-powered ballistic missile submarine, INS Aridaman, enhancing sea-based nuclear deterrence.
- This marks the first time India has three operational SSBNs, strengthening second-strike capability.
- The development reinforces India's status among a select group of countries (US, Russia, China, France) possessing a nuclear triad.
- The submarine is part of India's long-term indigenous nuclear submarine programme involving DRDO and international collaboration (notably Russia).

### Key Points

- INS Aridaman Features: Approx. 7,000-tonne SSBN with improved stealth and endurance.
- Equipped with 8 vertical launch tubes, nearly double its predecessors.
- Capable of carrying:
  - K-15 SLBM (~700 km range)
  - K-4 SLBM (~3,500 km range)
- Advanced nuclear reactor enabling long-duration submerged operations.
- Earlier SSBNs: INS Arihant (2016) – first indigenous SSBN.
- INS Arighaat (2024) – technologically upgraded successor.
- Strategic Significance: Ensures credible second-strike capability under India's No First Use (NFU) doctrine.

### Static Linkages

- Nuclear deterrence theory – concept of Mutually Assured Destruction (MAD)
- No First Use Policy and credible minimum deterrence
- Types of submarines: SSBN, SSN, SSGN
- Ballistic missile systems and ranges (short, intermediate, intercontinental)
- Role of pressurised water reactors in naval propulsion
- Maritime security and Indian Ocean strategic importance

### Critical Analysis

#### Pros:

- Strengthens deterrence credibility
- Enhances survivability (stealth)
- Boosts indigenisation and DRDO capability
- Improves India's strategic position in Indo-Pacific

#### Cons:

- High cost and maintenance burden
- Risk of regional arms race
- Limited fleet vs global powers
- Partial technology dependence

### Way Forward

- Expand SSBN fleet for continuous at-sea deterrence
- Accelerate indigenous reactor & propulsion tech
- Strengthen command & control systems
- Develop SSN fleet for tactical superiority
- Maintain NFU credibility + strategic restraint