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IMPORTANT

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GS 2: INTERNATIONAL RELATIONS

THE HINDU PAGE : 10

Why is the U.S. investigating India?

What allegations has the U.S. made on excess capacity and forced labour? How do the two Section 301 investigations relate to the current U.S. tariff regime? What issues are the U.S. investigations examining and why do industry experts see them as a pathway to new tariffs?

EXPLAINER

T.C.A. Sharad Raghavan

The story so far:

Over the last week, the U.S. government has launched two investigations against India and several other countries in a bid to find some form of actions or policies that "are unreasonable or discriminatory and burden or restrict U.S. commerce". These investigations will likely take a few months, but could eventually result in the return of tariffs.

What is the current situation on tariffs?

The U.S. Supreme Court on February 20 ruled against the validity of U.S. President Donald Trump's use of the International Emergency Economic Powers Act (IEEPA) to levy reciprocal tariffs on America's trade partners. For India, these reciprocal tariffs had been 50% from August 2025 to February 6, 2026, after which Mr. Trump reduced them to 25%.

Following the court's decision, Mr. Trump imposed a 10% tariff on imports from all countries for a period of 150 days under Section 122 of the Trade Act of 1974. He threatened to increase this to 15%, but has not done so.

However, he said the U.S. would use other sections of the Trade Act to levy additional tariffs.

What was the first investigation?

On March 11, the office of the U.S. Trade Representative (USTR) said it had initiated investigations against 16 economies, including India, to see whether these economies were using excess manufacturing capacity to export to the U.S. in a manner that was hurting American businesses.

The order for investigation under Section 301(b) of the Trade Act included specific allegations against the economies



GETTY IMAGES

named – China, the European Union, Singapore, Switzerland, Norway, Indonesia, Malaysia, Cambodia, Thailand, Korea, Vietnam, Taiwan, Bangladesh, Mexico, Japan, and India.

In India's case, the U.S. said the country had a bilateral trade surplus with it of \$58 billion in 2025. Indian government data, however, shows that India had a merchandise trade surplus of \$42.2 billion with the U.S. over this period.

"India's global goods trade surplus sectors include textiles, health, construction goods, and automotive goods," the U.S. order said. "For example, evidence suggests the solar module sector is plagued by excess capacity, including that India's current module manufacturing is nearly triple annual domestic demand."

It added that India has created "significant excess capacity" in petrochemicals, steel, and other industries.

What is the second investigation about?

A day later, the USTR announced the launch of a fresh investigation, this time

on 60 countries, including India. The fresh investigation was to look into whether these countries had taken "sufficient steps" to prohibit the import of goods produced with forced labour and how the "failure to eradicate" these practices impacts U.S. workers and businesses.

This investigation, too, was under Section 301(b) of the Trade Act of 1974.

Why is Section 301(b) significant?

Section 301 of the Trade Act of 1974 is aimed at addressing unfair foreign practices affecting U.S. businesses. Notably, according to the website of the USTR, "Section 301 may be used to respond to unjustifiable, unreasonable, or discriminatory foreign government practices that burden or restrict U.S. commerce".

According to trade and industry experts, this "response" that has been allowed in the law is the pathway through which the Trump administration could once again levy tariffs on imports from other countries once the 150-day window for his current 10% expires.

"While its [the investigation's] impact on India's exports will be clear only after

the investigation concludes, it seems the move is aimed at imposing a new tariff once the 150 days for the 10% global tariff expires," Pankaj Chadha, chairman of the Engineering Exports Promotion Council of India, said.

How did the Indian government respond?

So far, it has not responded publicly. In contrast, the European Union has already spoken strongly about it.

"We will be seeking further clarity from the U.S. on how the opening of this section 301 investigation would interact with" the EU-U.S. agreement signed last year, European Commission spokesman Olof Gill said. "The commission would respond firmly and proportionately to any breach of the joint statement commitments," he added.

How have Indian industries responded?

Mr. Chadha said that this fresh development comes over and above the existing tariffs that the steel, aluminium, auto, and auto components sectors still have to pay. The U.S. has implemented a separate 50% tariff on the import of these goods, including from India, which continues even after the Supreme Court's order.

Similarly, the Confederation of Indian Textile Industry has said that the recent developments add further uncertainty to the textiles and apparel sector, which it said is already under significant stress due to the developments in West Asia and a lack of clarity over how the U.S. tariff situation will unfold.

Ravi Sam, the Vice Chairman of industry body Texprocil, however, said there is no need for panic as these investigations will be long, drawn-out processes and will not have any immediate impact. This sentiment was echoed by trade expert and former Director General of Foreign Trade Ajay Srivastava as well.

THE GIST

The U.S. has launched two investigations under Section 301 of the Trade Act of 1974 against India and other economies to examine practices that may be 'unreasonable or discriminatory and burden or restrict U.S. commerce'.

One probe examines whether countries, including India, are using excess manufacturing capacity to export to the U.S. in a manner that hurts American businesses, while another looks at whether countries have taken 'sufficient steps' to prohibit imports of goods produced with forced labour.

GS 2 : INDIAN POLITY

INDIAN EXPRESS PAGE: 1

COUNTING OF VOTES FOR ALL FIVE ASSEMBLIES ON MAY 4

Contest kicks off: Bengal to vote in 2 phases, others one

Will ensure polls free of violence and inducement: CEC Gyanesh Kumar

Damini Nath
New Delhi, March 15

SETTING THE stage for intense electoral campaigns in the coming weeks, the Election Commission Sunday announced single-phase Assembly elections in Assam, Kerala, Puducherry (April 9) and Tamil Nadu (April 23), and two-phased polling in West Bengal on April 23 and April 29, down from the eight phases last time.

POLITICS PAGE 6

BATTLELINES DRAWN FOR BJP, OPP PARTIES

Counting of votes will be held on May 4, the Election Commission said.

“Elections in all these four »CONTINUED ON PAGE 2

‘Under adjudication’: Lakhs of Bengal voters in race against time

Damini Nath
New Delhi, March 15

WITH THE Election Commission announcing Sunday that the West Bengal Assembly elections will be held in two phases, on April 23 and April 29, it’s a race against time for 60 lakh electors in the state whose eligibility is under adjudication.

E. For now, they have been kept off the electoral rolls and can only hope for a decision in their favour to make it to the rolls in time to cast their votes.

While announcing the poll schedule for the West Bengal elections, Chief Election »CONTINUED ON PAGE 2

34 cr LPG consumers: Average household use half cylinder per month

Anjishnu Das
New Delhi, March 15

AS THE energy crisis stemming from the conflict in West Asia continues to grow, data on consumption of liquified petroleum gas (LPG) shows that states with the most beneficiaries under the Pradhan Mantri Ujjwala Yojana (PMUY), a programme that largely targets rural households, tend to consume the most LPG overall, though each household in such states consumes less

»CONTINUED ON PAGE 2

Business as Usual

By EP UNNY



First group of Indians stranded in Iran lands in Delhi: ‘Long journey’

Divya A
New Delhi, March 15

THE FIRST batch of Indian nationals stranded in Iran over the past fortnight amid the war in West Asia arrived in New Delhi Sunday morning on a special commercial flight via Armenia, completing a journey that a student in the group described as “long and difficult”.

The flight took off from Yerevan airport on Saturday afternoon, carrying 70 students and

»CONTINUED ON PAGE 2

LATEST

- QUASHING DEATH RUMOURS, BIBI RELEASES VIDEO HAVING COFFEE
- IRAN FIRES MORE MISSILES AT ISRAEL AND U.S. BASES IN REGION
- 400 MN BARRELS OF OIL FROM EMERGENCY STOCKS TO FLOW SOON: IEA

MORE REPORTS, PAGES 3, 9, 12, 16

34 crore LPG consumers: Average household use 1/2 cylinder a month

In largely rural Bihar, households use 6.7 kg of LPG per month on average; in mostly urban Delhi, the average monthly consumption per household is 11.4 kg

LPG per month than states with more urban populations.

Over the last three decades, as per data published by the Petroleum Planning and Analysis Cell (PPAC), which falls under the Union Ministry of Petroleum and Natural Gas, India's total LPG consumption has grown six-fold — from 446 TMT (thousand metric tonnes) in 1998-99 to 2,754 TMT in 2025-26.

The 2000s and 2010s saw the highest growth rate of LPG consumption — between 8% and 11% each year. In 2016-17, after the launch of the PMUY, which provides free LPG connections and subsidised cylinders to poor and rural households, there was a considerable spike in LPG consumption — with a growth rate of 10.1% over the previous year. But since 2020, growth in consumption has slowed as LPG connections reached a saturation level.

Earlier, while rural households traditionally relied on fuel sources like firewood and animal dung for cooking, the

introduction of the PMUY resulted in an increasing acceptance of LPG as a cooking fuel. As per an answer to a Lok Sabha question, 80% of PMUY's beneficiaries were rural households as of end-2024.

As of today, there are 33.37 crore LPG customers across India, including 10.56 crore PMUY connections.

The PPAC data, as of December 2025, shows that largely rural and poorer states have the most LPG consumers, particularly under PMUY, and the highest total monthly LPG consumption.

Uttar Pradesh alone, with 4.87 crore LPG consumers including 1.88 crore PMUY beneficiaries, accounts for 15% of India's total LPG consumers. The other states with the most LPG consumers are Maharashtra at 3.2 crore, West Bengal at 2.72 crore, Tamil Nadu at 2.4 crore, Bihar at 2.33 crore and Karnataka at 1.9 crore.

Under the Ujjwala scheme, after UP, West Bengal has the most beneficiaries at 1.24 crore, followed by Bihar at 1.18 crore, Madhya Pradesh at 89 lakh and Rajasthan at 74.3 lakh. In each

of these states, rural households make up a majority of their populations. While 69.8% of India's population is rural, as per the 2011 Census, the figure stands at 77.7% in UP, 68.1% in Bengal, 88.7% in Bihar, 72.4% in Madhya Pradesh and 75.1% in Rajasthan.

An analysis of monthly average consumption of LPG per household shows that urban consumers use far more cooking gas than rural ones. For instance, while households in largely urban Delhi use an average 11.4 kg of LPG per month, in Bihar and UP, where a majority of the population is rural, the average monthly consumption per household is just 6.7 kg and 7.7 kg, respectively, or less than half a cylinder.

This consumption pattern has a strong correlation with PMUY beneficiaries, 80% of whom live in rural areas. In the states with the most Ujjwala connections, like Bihar and UP, a majority of the population is rural.

A comparison of average monthly LPG consumption per household of a largely rural

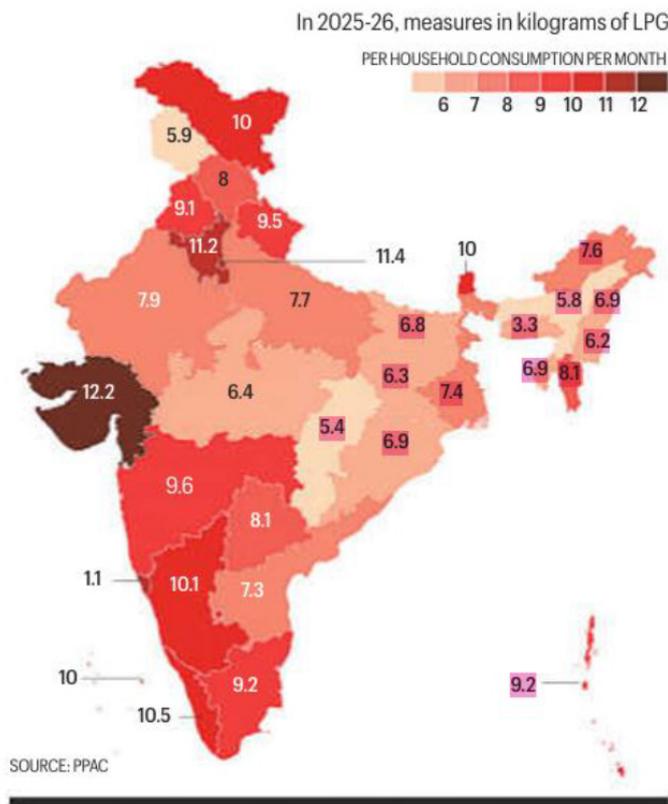
state like Bihar with a mostly urban one like Delhi suggests that while rural households have the connections, they are likely stretching their cylinders out over longer periods or using other cooking fuels, whereas urban households rely on LPG exclusively and use it more intensively.

The per-household monthly usage also correlates with per capita income. Households in richer states are more likely than poorer states to consume more LPG each month.

The low average household consumption in largely rural states is despite several of them using the most LPG at the state level. UP, for instance, consumes an average 3774 TMT of LPG per month — the highest among all states — but its average household's monthly consumption stands at 22nd in the country.

It's a similar story in states like West Bengal, Bihar and Madhya Pradesh — all of which have among the lowest average household consumption despite figuring among the top states in terms of total LPG consumed per month.

• Average household consumption of LPG



GS 2 : INTERNATIONAL RELATIONS

INDIAN EXPRESS PAGE : 10

Return of Russian oil signals US pragmatism

THE DONALD Trump administration's decision to suspend certain sanctions on Russian oil for 30 days marks an important moment in the geopolitics of energy, war and diplomacy in the Gulf region. The implications stretch beyond the urgent need to stabilise the energy markets. It points to the prospects for a long-overdue political understanding between Washington and Moscow. After the US and Israel launched a military campaign against Iran two weeks ago, Tehran effectively closed the Strait of Hormuz — the chokepoint through which roughly 20 per cent of the world's oil transits — sending crude prices from around \$70 to above \$110 per barrel. Facing the prospect of an energy shock capable of destabilising major economies, Washington concluded that extraordinary measures were necessary.

Trump's move reflects Washington's appreciation of oil-rich Russia's weight in shaping the global energy market. By letting Russian oil flow into the markets, Washington hopes to ease prices without formally dismantling the broader sanctions regime built since Russia's invasion of Ukraine. The International Energy Agency simultaneously announced its largest-ever emergency stockpile drawdown, though neither measure has so far succeeded in fully calming markets. The Russian oil waiver initially applied to India alone before being extended to all buyers. The India-specific origins acknowledged New Delhi's deep energy dependence and its role as a major global buyer. The broader expansion to all buyers signalled that under acute supply pressure, Washington is willing to accept flexibility in the sanctions framework.

While India welcomes this pragmatism, Europe has reacted with alarm, warning that eased sanctions replenish the Kremlin's war chest and release the political pressure on Moscow to end the war in Ukraine. Clearly, there is no escaping the tension, if sanctions are the primary lever of Western pressure on Russia. Beyond the immediate needs of reducing the pressure on energy markets, the easing of Russian sanctions raises the broader question of a breakthrough in US-Russian political engagement. The sanctions architecture is embedded in US domestic legislation, alliance politics, and the challenge of constructing a peace in Ukraine that is acceptable to Europe. Trump's 30-day waiver could be seen as a tactical adjustment under pressure, not a strategic reorientation. It reveals, however, a structural reality that Western policymakers have long sought to obscure: The global energy system remains dependent on Russian hydrocarbons. Russia could also play a significant role in facilitating stability in the Middle East. Building on US convergences with Russia while finding a reasonable agreement on Ukraine is one of the most consequential diplomatic challenges today. It is also a strategic opportunity that Delhi must press Washington and Moscow to seize.

GS 3: INDIAN ECONOMY

INDIAN EXPRESS PAGE : 11

Disruption carries a reminder: Policy reforms in fertiliser sector are overdue



ASHOK GULATI
AND RITIKA JUNEJA

THERE IS a famous saying, "never let a serious crisis go to waste". India's landmark economic reforms in 1991 were the result of a balance-of-payments crisis. And today the country sits on comfortable foreign exchange reserves of over \$728 billion, providing a good cushion to absorb external shocks. But the ongoing war in the Gulf between Iran on one side and Israel and the US on the other has exposed the vulnerabilities of energy and fertiliser supplies. The situation calls for strategic thinking and reforms in the fertiliser sector to ensure food security.

The escalating war is threatening a major disruption in energy and fertiliser supplies. The risks extend to vital maritime choke-points such as the Strait of Hormuz, through which a substantial share of global oil and gas trade passes. Any disruption in this corridor quickly ripples across commodity markets. Oil and gas, and by extension fertilisers, especially urea, have already felt the tremors.

For India, crude oil is the largest import item, with about 83 per cent of its requirement being met through imports. In the financial year 2024-25 (FY25), India imported approximately 243 million tonnes (Mt) of crude oil worth \$137 billion, nearly half of which was sourced from the Middle East via the Strait of Hormuz. Just before tensions escalated in late February, Brent crude averaged \$66 per barrel, but within two weeks, prices spiked to around \$120 per barrel before settling near \$100 on March 13. India's exposure extends to cooking gas as well. The country imports about two-thirds of its LPG (31.3 Mt in FY25), much of which moves through the same corridor. As supplies tightened and import costs rose, domestic LPG prices were raised by Rs 60 per cylinder.

India's Liquefied Natural Gas (LNG) imports have also been hit. In FY25, the country

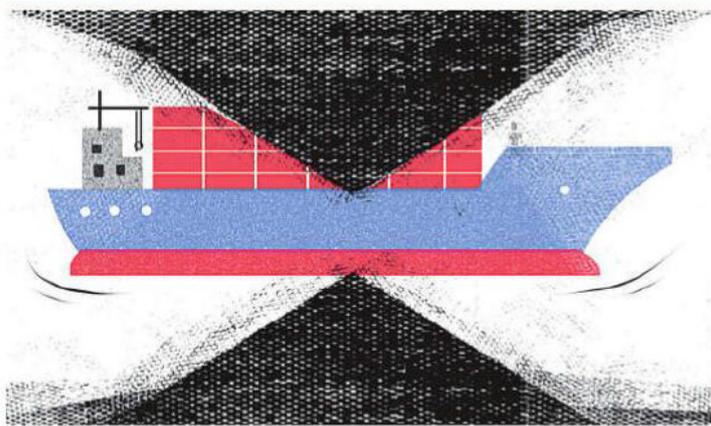


ILLUSTRATION: C R SASIKUMAR

imported about 27 Mt of LNG — roughly half of its requirement — worth around \$15 billion, with Qatar accounting for nearly half of these imports. The disruptions across the Middle East pushed Asian spot LNG prices from around \$10/mmBtu to \$24-25/mmBtu within two weeks. By invoking the Essential Commodities Act, the government has prioritised gas allocation for households and transport, leaving fertiliser producers with only 70 per cent of their usual six-month consumption. This is likely to adversely hit the domestic production of urea.

This matters because India's food security hinges heavily on fertiliser security, and urea production is closely tied to global energy markets. India consumes about 40 Mt of urea annually, but domestic output has stagnated at around 30 Mt, forcing rising imports that could exceed 10 Mt in FY26, nearly double the 5.6 Mt imported in FY25. Over 60 per cent of these imports come from the Persian Gulf region. Following the escalation in the war, global urea prices surged from about \$484/tonne to \$652/tonne within 10 days — a 35 per cent jump — and may rise further as uncertainty persists. The dependence runs deeper:

Diversify fertiliser imports and their feedstocks by involving countries other than those from the Gulf. Reform the fertiliser sector either through DBT and decontrolling prices, or quantitative restrictions, or bringing urea under the NBS

Natural gas, the key feedstock for urea, is largely imported, supplying about 85 per cent of the gas used in domestic production. Once both direct urea imports and imported gas feedstock are considered, India's effective import dependence in urea goes up to about 55 per cent.

Dependence is similarly high for other fertiliser inputs. Over 80 per cent of ammonia and sulphur imports come from the Gulf, while around 40 per cent of DAP imports are sourced from Saudi Arabia. India also relies almost entirely on imports for potassic fertilisers (MOP) and about 90-95 per cent for phosphatic raw materials (rock and acid). Once the import content of intermediates and feedstocks is considered, India depends on global fertiliser supply chains for about 68-70 per cent of its requirements in FY25, leaving the sector — and India's food security — highly vulnerable to geopolitical disruptions, price volatility, and supply shocks.

India also exports agri-products to the Middle East (\$11.8 billion in FY25), which are under strain. But the biggest worry is about imports of oil, gas, and fertilisers. If this crisis continues beyond a month or so,

the country's fertiliser subsidy bill in FY27 could cross Rs 2 lakh crore, against a budgeted figure of Rs 1.7 lakh crore. This calls for immediate reforms in this sector.

How do we do that? First, India must diversify its imports beyond the Gulf countries. Complementing this, India should expand overseas investments in fertiliser minerals and production assets while accelerating domestic exploration of fertiliser resources. Establishing a dedicated fertiliser investment fund of say, \$1 billion, could enable Indian companies to acquire equity stakes in global mining projects and finance domestic exploration, shifting India from reactive import dependence to investment-led supply security.

Second, policy reforms in fertiliser pricing and subsidies are essential and overdue. Direct transfer of fertiliser subsidies to farmers and gradual deregulation of macro-nutrient prices would encourage balanced fertiliser use of N, P and K, while reducing fiscal pressures. If it plug leakages as well — at about 20 per cent, they are quite substantial. If such reforms appear too ambitious in the short run, an alternative would be to put quantitative restrictions on sales based on farm size, cropping patterns, and nutrient doses recommended by state agriculture universities. With the government already developing AgriStack, implementing such targeted allocation mechanisms seems feasible.

Third, if this is also not possible, then at least bring urea under the Nutrient-Based Subsidy (NBS) framework, aligning its price with other fertilisers (P and K) and promoting more balanced nutrient application.

In essence, policymakers need to work on two fronts: First, diversify fertiliser imports and their feedstocks by involving countries other than those from the Gulf region. Second, reform the fertiliser sector either through DBT and decontrolling prices, or put quantitative restrictions in place, or bring urea under the NBS scheme. If Prime Minister Narendra Modi can convert this crisis into an opportunity to reform the fertiliser sector, it will bring rich rewards. But will he bite the bullet?

Gulati is distinguished professor at ICRIER and Juneja is research fellow at ICRIER. Views are personal

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On the right to die with dignity

On an evening in 2013, 20-year-old Harish Rana fell from the fourth floor of his PG accommodation and sustained critical injuries. His condition confined him to a bed while tubes kept him on life support. Owing to his Persistent Vegetative State (PVS), he responded to no stimuli around him and was largely nursed by his parents, with frequent visits to the hospital. Mr. Rana's closest friends and family, who fondly describe him as energetic and exuberant, were faced with the agonising pain of witnessing his stasis. His parents, along with the doctors, devoted 13 years in tending to Mr. Rana, but no improvement was seen. Confronted with such despairing circumstances, the parents moved the Supreme Court to withdraw life support, so that nature can be allowed to take its course. What followed was a pivotal discourse on the import of life under Article 21 of our Constitution.

A respectable death

The Constitution's tryst with 'Right to Life with dignity' was first laid down in *Gian Kaur vs State of Punjab* (1996) where the Supreme Court held that 'life' under Article 21 included the right to live with dignity. However, in *Gian Kaur*, the Court opined that Article 21 did not include the right to die.

Fifteen years later, a similar case reached the Supreme Court when a young Aruna Shanbaug, owing to a brutal sexual assault, was left in PVS. Pinki Virani, journalist, and human-rights activist, petitioned the Supreme Court as Aruna's friend for withdrawal of her life support. Although under its own circumstances, Virani's plea was rejected, it culminated in the crucial decision of *Aruna R. Shanbaug vs Union of India* (2011). The Supreme Court drew sustenance from foreign legal frameworks and recognised passive euthanasia in cases of patients with terminal illness and undergoing prolonged, but



Satvik Varma

is a senior advocate in New Delhi. With inputs from Shantanu Parmar, advocate

The right of refusal of medical treatment was held to be a manifestation of dignity intersecting with privacy, autonomy, and self-determination

ineffective treatment. Guidelines were framed to bridge the legislative gap, until Parliament promulgated on the subject. Additionally, the Law Commission in 2006 and 2012, entered into an in-depth examination of the above-detailed issues and made extensive observations. It reported that withholding life support from terminally ill patients should not attract criminal liability if done in pursuance of the "best interest of the patient."

The watershed moment on the subject was the 2018 Constitution Bench's decision in *Common Cause vs Union of India*. Armed with developing jurisprudence on the subject, the Supreme Court unequivocally recognised and permitted the withdrawal/withholding of medical treatment to fall within Article 21. The right of refusal of medical treatment was held to be a manifestation of dignity intersecting with privacy, autonomy, and self-determination. This judgment provided extensive guidelines and underwent certain modifications in a similarly titled 2023 decision. These are now cumulatively referred to as the 'Common Cause guidelines', which rest on two core principles: first, that the intervention in question must qualify as "medical treatment"; and second, that its withdrawal must be strictly in the patient's "best interest."

The Supreme Court embedded various safeguards to prevent misuse and a detailed procedure involving opinions of primary and secondary Medical Boards prior to undertaking such decisions. The legislative void was once again highlighted by the Court and one Judge expressed the "pious hope" for legislative intervention. This hope still lingers.

Case evaluation

The Harish Rana chronicle has now reached its end with the intervention by the Supreme Court. Speaking through two judges, who authored separate but concurring judgments, the Court allowed the withdrawal of life

support from Mr. Rana under the Common Cause guidelines. Since he relied on Clinically Assisted Nutrition and Hydration (CANH), the first question which required consideration was whether CANH qualified as 'medical treatment.' To answer this, the Court noted that the administration of CANH requires careful and experienced medical supervision. Since such skills are only available by drawing upon medical knowledge, and owing to its continuous periodic evaluation, emergency medical management and supervision, it was held to be 'medical treatment.' The second question was whether the withdrawal of CANH from Mr. Rana was in his best interests. It held that 'best interests' must be envisaged from the lens of the stakeholders, who are the next of kin and medical boards. It was rightly opined that a doctor's duty to perform treatment continues till it is capable of "conferring some therapeutic benefit." When recovery is impossible, the continuation of treatment merely prolongs biological existence de-hors any benefits. It led to the sole conclusion – withdrawal of treatment which was noted to be in Mr. Rana's best interests.

A definitive end

"For in that sleep of death what dreams may come, when we have shuffled off this mortal coil, must give us pause." Through his prose, the Bard cautioned that hesitation about death stems from the uncertainty of what comes after. However, what is definitive is that the ones who pass-on tend to live through us. Harish Rana will soon die. Yet, his contributions will forever be etched in history and in our constitutional jurisprudence.

And so, the advancement of constitutional morality is not only circumscribed to legislative actions which reach the country at large. It is also through addressing uncomfortable issues that advance the cause for humanity, even if they concern just an indiscernible minority.