

EDITORIAL HIGHLIGHTS

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India's China+1 lessons lie within its own States

"Don't look at India – look at what's happening with specific States," a veteran investor told these writers in one of 50 interviews with senior industry executives, policymakers and experts for a 2026 study at the East Asian Institute on how global firms are reworking their China+1 plans.

However, the national conversation tends to run the other way. Every few months, someone advises India to study Vietnam's industrial parks, Mexico's nearshoring or Poland's supply chains. Meanwhile, two instructive case studies sit right at home – in Tamil Nadu and Karnataka. Global firms do not choose "India" as a homogenous monolithic edifice. They choose a State, and with it, the land, power supply, approvals, workers and suppliers.

Two States, their approaches

At Sriperumbudur, near Chennai, Foxconn employs tens of thousands of people assembling iPhones. Tata Electronics has expanded at Hosur. In January 2026, the Centre approved projects in Tamil Nadu under its Electronics Components Manufacturing Scheme (ECMS), including mobile-phone enclosure units by Yuzhan Technology, a Foxconn-linked firm, and Tata Electronics. These are commitments rather than finished factories, but they reflect the advantages of an industrial ecosystem that has taken decades to build.

None of this began with China+1. Tamil Nadu invested in technical education, built an automobile and components industry around Chennai, and developed the suppliers, skills and administrative experience that new manufacturers look for. Several investors told us that policy continuity is essential and that commitments must be honoured regardless of political turnover. That is now being tested following the change of government in Tamil Nadu in May 2026. One academic respondent argued that Tamil Nadu would have done well irrespective of China. Its industrial base took four or five decades to build; no announcement of an industrial park or round of subsidies can conjure



P.S. Srinivas
Visiting Research Professor at the East Asian Institute, National University of Singapore



Anisha Sircar
Non-Resident Fellow at the East Asian Institute, National University of Singapore

Karnataka and Tamil Nadu are leading examples of how industrial ecosystems attract global manufacturers

that up. Karnataka followed a different path. Bengaluru began with software and engineering talent, and not Chennai's automobile base. Foxconn's 300-acre campus at Devanahalli, where women reportedly form about 80% of the workforce, aims to create around 50,000 jobs. Tata Electronics took over Wistron's iPhone plant at Narsapura, in a deal agreed in late 2023, and has grown rapidly since.

Tamil Nadu faces limits in land, power and labour, and relies on migrant workers from the northern and central States. It is now seeking to move beyond labour-intensive assembly towards more capital-intensive manufacturing and innovation-led exports.

National policy, State-level delivery

National incentives are integral, too. One manufacturer explained the combined effect of tariffs and production-linked incentives (PLI): "If the duty is 20 per cent and I get a PLI of 6 per cent, competitors cannot compete with me. This is working right here." The PLI scheme for large-scale electronics manufacturing ended on March 31, 2026, and the Cabinet approved a successor on July 15. In January, the Centre cleared 22 proposals under the ECMS, worth ₹41,863 crore and expected to create 33,791 direct jobs across eight States. The Centre describes this spread as "geographically balanced industrial growth". In March, the Cabinet approved easing Press Note 3, which introduced curbs in 2020 on investment from countries sharing a land border with India. These measures help attract investment, but whether that investment takes root depends on what individual States can offer. The factory still has to come up somewhere.

Still, Tamil Nadu ranks only fifth in the Department for Promotion of Industry and Internal Trade's (DPIIT) data on foreign direct investment (FDI) equity inflows for October 2019 to March 2026, accounting for about 6%. This is behind Maharashtra (31%), Karnataka (21%), Gujarat (15%) and Delhi (13%).

However, DPIIT records FDI against the State in which the receiving company has its head office, rather than where the money is spent. So,

the figures tell us little about where factories are being built.

Assembly is only the first step. One electronics executive told us that "very few components are manufactured in India" and that there is still a "huge reliance on China for major parts and supply chains". Backward linkages remain thin. Another respondent said his firm had set a billion-dollar target for sourcing in India but, after two or three years, had managed to source "about 600 million out of that". Such ecosystems cannot be built in a hurry: "Value addition is a process which takes time – it is a four-to-five-year process."

Electronics exports touched about \$48 billion in 2025-26, while imports stood at about \$116 billion. Although export growth is impressive, the trade gap suggests that India still has considerable ground to cover in component manufacturing. One executive described the exports as "assembled products with 20 per cent inputs in India".

India's industrial divide

Concentration also carries risks. One respondent said growth is "largely happening in the southern and western parts, not in the most populous States such as Bihar, Chhattisgarh and Jharkhand".

Spreading subsidies thinly will not, by itself, replicate Tamil Nadu's supplier networks or Karnataka's technical labour pool. The key questions are what these States did to prepare land, train workers, clear approvals, nurture suppliers and retain investors, and which of these measures can be replicated, and what rests on decades of accumulated capacity.

India's China+1 debate keeps looking abroad for a model, even as some of the most instructive factories have been coming up all along on the outskirts of Chennai and Bengaluru.

This article draws on 50 interviews for the EAI Special Report, "India, China, and the 'China+1' Strategies of Global Firms" (September 2026), and on P.S. Srinivas, Frank N. Pieke and Alfreed Schipke, "India, China and the China+1 Strategy", Global Policy (2026)

GS 2: POLITY

THE HINDU PAGE: 09

Satyagraha for Constitution-as-commons

The events unfolding on the streets of India signal the emergence of a new language of citizenship and a new language of the Constitution. This has been in the making over the past decade and a half. It has taken its time as fashioning a new language and grammar of justice is a process that has to distil public anger against the criminal dispossession by this government. The public face of criminal dispossession brazenly glares down at us: from dwellings and homes, savings, education, and now voting rights.

This is the time when it all comes together – through the fearless confrontation of young protesters with a disproportionately weaponised police; when only those political leaders, who are out on the streets engaging with the armed state in the same manner in which these (extra)ordinary protestors are, retain public credibility and legitimacy; when lawyers preparing to defend resisters (and themselves) know that they will be huddled into vans and booked for practising their profession. This is the time when self-styled monarchs who took possession of their seats of power, grabbed through a daylight robbery of votes, can no longer sit on them, but instead hide behind them, cowering in fear.

This is also the time when judges repeat endless platitudes about how the only protests deserving of judicial attention are 'lawful protests', and assert meekly (within the enclosure of the court) that they are bound by 'judicial discipline' in considering the lawful right to bail for prisoners such as



Kalpana Kannabiran

Advanced Fellow,
Vienna Centre for
Advanced Studies,
University of Vienna.
Views expressed are
personal

The resisters out on the streets today are those who hold Gandhi's talisman and Ambedkar's Preamble in their fight to restore to the people of this country control over their lives

Umar Khalid and Sharjeel Imam. They make this assertion without stopping to reflect on the unlawful mayhem let loose by the 'rulers' against whom 'lawful protest' is an oxymoron. How does one 'lawfully' challenge the government's politics of maiming, when what has been maimed is the law and courts? To protest is unlawful under authoritarianism; it is lawful in a constitutional democracy. The ruling *diktat* has labelled the common citizen as an *andolanjeevi* – a new extra-statutory category of criminal – who stands accused of the crime of being a citizen who knows their rights. That judges and courts fail to redefine the fundamental meaning of 'judicial discipline' and 'lawful public action' at a time when the Constitution is under siege is tragic.

Duty to the nation

This is the country where satyagraha was born and takes new forms at different times. We have now reached a turning point as a country. This fire in our belly must be quelled; not through the use of pellet guns, lathis, and courtly intimidations, but through peaceful protest. It is our birthright.

The Constitution is our commons. It provides the normative ethical framework for citizenship and shared humanity. It speaks to a just future that guarantees dignity, self-respect, autonomy and solidarity while being mindful of discrimination and structural violence, that must be eliminated. Dignity and shared humanity lie at its core – a guarantee of citizenship as birthright. This idea of the 'Constitution-as-commons' helps in bridging different pathways to imagine an idea

of justice. In elaborating on this, we need to bring together popular imaginations of justice that we see opening out before us, predicated on the constitutional convivialities made possible by this popular uprising and its precursors.

Courts and judges need to understand this 'constitutional jurisprudence from the streets' and its interpretive methods through a welcoming acknowledgement of the pedagogic import of this collective constitutionalism. This shift in the country has been nothing short of a glimpse at a utopia; therefore, it is important, theoretically and politically, to trace the contours of this possibility – not just for India, but through the Indian experience for a more holistic, pluriversal understanding, without losing sight of the fact that justice is always spatially rooted. That space is now no longer the reductionist enclosure of the court, nor even the fortified monument that is Parliament, but the 'outside'. The streets, under the open skies, is where the Constitution resides today.

Conviviality and the cultural politics of care, as the conscientious resisters demonstrate to us today, can only be located in the context of civic resistance against state violence in India. This politics of care, of which protest and resistance is part, challenges crimes by the state. The resisters out on the streets today are those who hold Gandhi's talisman and Ambedkar's Preamble in their fight to restore to the people of this country control over their lives.

GS 3: ECONOMY

THE HINDU PAGE: 09

The myth of 'unskilled' labour

According to the Safe in India Foundation, unskilled workers earning under ₹8,000 a month in the automotive sector lost 2.27 fingers per accident on average in 2024 versus 1.54 fingers for skilled workers earning more than ₹20,000. Earlier this year, thousands of industrial workers protested their stagnant wages across Noida and New Delhi. The Uttar Pradesh government responded by giving 'unskilled' workers an interim hike of ₹13,690 a month and 'skilled' workers ₹16,868, despite both groups facing the same inflation.

Based on assessing migrant labourers in Kerala's construction and hospitality sectors, the International Institute of Migration and Development, Thiruvananthapuram, has estimated that 'unskilled' workers experienced 40% more wage theft than skilled workers. Factories often use the label 'unskilled' to justify withholding annual increments, health benefits, and safety training. The Safe in India Foundation report attributed the higher severe injury rate among 'unskilled' workers to employers often tasking such workers with operating dangerous power press machines without adequate training or safety measures. Contractors likewise deny construction workers personal protective equipment and often deny the final month's pay knowing labourers lack legal recourse, and exclude sanitation workers from safety protocols in hazardous occupations.

In fact, the 'unskilled' status is one the state sustains rather than what naturally arises in society. Across sectors, supposedly



Vasudevan
Mukunth

'unskilled' workers are expected to have skills such as handling construction materials, coordinating physical work, identifying defects or irregularities in finished products, using hand and power tools effectively, aligning and placing materials accurately, maintaining tolerances during repetitive production, troubleshooting routine production issues, responding appropriately to process issues, carefully handling human waste, working safely in confined spaces, and recognising hazardous gases and other dangerous conditions, among many others.

Stratified labour market

'Skill' in India has become an occupational as well as a social category: workers may acquire a considerable amount of embodied knowledge through experience yet remain 'unskilled' in the eyes of institutions because they lack the formal credentials used to recognise, and pay for, skill. India's labour market also remains stratified along caste, class, gender, and, increasingly, migration lines, influencing which forms of labour are considered 'skilled', and so remunerative. The informalisation of jobs – such as municipal corporations hiring contractors to hire sanitation workers on contracts – has also weakened the relationship between competence and occupational status. Ultimately, economic production is sustained on the engagement of millions of workers whose job security it fails to improve.

The Code on Wages requires governments to account for a worker's skill

level when fixing minimum wages, together with geographical area, whether the work is arduous or hazardous, and so on. The wage schedules of the Union government then assign floors for workers performing otherwise comparable work. In agriculture, thus, the daily rates in September were ₹528 for unskilled work, ₹578 for semi-skilled work, ₹627 for skilled work, and ₹694 for highly skilled work (in urban centres with the highest costs of living).

Per the government, 'unskilled' agricultural work encompasses weeding and manually watering crops and requires 'only' physical effort and no training or judgment. 'Highly skilled' work, however, demands advanced technical expertise, like calibrating a combine harvester or managing pest outbreaks. But weeding and irrigation also involve learned techniques such as identifying weeds, assessing soil conditions, using tools without damaging plants, and planning work according to weather conditions.

Yet the way India classifies skills, compounded by its preference for institutional recognition, disproportionately concentrates 'unskilled' workers in informal jobs. And the classification is self-reinforcing: lower wages reduce workers' ability to obtain institutional qualifications or avoid precarious employment while precarious employment makes employers less inclined to invest in their workers' training and safety.

mukunth.v@thehindu.co.in

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GS 2: POLITY

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How has the SC strengthened arrest safeguards?

What makes written grounds of arrest mandatory, and what happens if they are not provided?

R.K. Vij

The story so far:

The Supreme Court recently, in *Jaskaran Jeet Singh Deol v. State of Punjab* (September 2026), held that the investigating agency would require permission of the magistrate to re-arrest the accused after his previous arrest was held illegal for the non-supply of the grounds of arrest in writing. It also recommended departmental action for the negligent investigating officer (IO) and change of the IO in the case.

What governs the communication of grounds of arrest?

The genesis of informing the grounds of arrest to a person flows from the Constitutional safeguard provided in Article 21 that no person shall be deprived of his life and personal liberty except according to procedure established by law. Article 22(2) says that every person who is arrested and detained in custody shall be produced before the nearest magistrate within a period of 24 hours of such arrest, excluding the time necessary for the journey from the place of arrest to the court of the magistrate, and no such person shall be detained in custody beyond the said period without the

authority of a magistrate.

The Constitutional safeguard is incorporated in Section 50 of the CrPC (now Section 47 of BNSS). Section 47 of BNSS casts a duty on the police officer to communicate the grounds of arrest to an accused person arrested without a warrant. However, neither Article 22(2) of the Constitution nor Section 47 of BNSS specifies the mode of communicating the grounds of arrest to an accused person.

How has the law evolved?

In *Pankaj Bansal v. Union of India & Ors.* (2023), the Supreme Court while dealing with a case of Prevention of Money Laundering Act, 2002 (PMLA) held that there was no valid reason as to why a written copy of the grounds of arrest could not be provided to the arrestee as a standard procedure without any exception. The court cited two reasons for it. First, in case the grounds of arrest are orally read out to an accused person, those orally stated facts could be disputed in a given case. Second, the accused person may seek legal counsel to avail bail. The court therefore held that furnishing a copy of written grounds of arrest to an accused was mandatory without exception.

This principle was reiterated by the court in *Prabir Purkayastha v. State (NCT*

of Delhi) (May 2024) while dealing with a case under the Unlawful Activities (Prevention) Act, 1967. It held that communicating the grounds of arrest was not merely a procedural formality but a vital safeguard with the ultimate objective of enabling the arrested person to effectively consult legal aid and be prepared to raise objections in the remand hearing and apply for his/her bail. Also, any breach of Article 22(2) would vitiate the lawfulness of arrest and subsequent remand, and entitle the person to be set at liberty.

However, in *Vihaan Kumar v. State of Haryana and Another* (2025), the court observed that although the ideal mode of communication of grounds of arrest is to provide such grounds in writing, there is no such statutory requirement to do so.

What did the court rule in the Rajesh Mihir Shah case?

The Supreme Court in *Rajesh Mihir Shah v. State of Maharashtra and Another* (2025) held that the constitutional mandate of informing the arrestee of the grounds of arrest is mandatory in all offences under all statutes, including offences under the IPC (now BNS). Second, the grounds of arrest must be communicated in writing to the arrestee in the language he/she understands. Third, in cases where the

arresting officer is unable to communicate the grounds of arrest in writing on or soon after arrest, it needs to be done orally. The said grounds of arrest are to be communicated in writing within a reasonable time and in any case at least two hours prior to production of the arrestee for remand proceedings before the magistrate. Fourth, in case of non-compliance, the arrest and subsequent remand would be rendered illegal.

What are the consequences?

The court in the *Jaskaran Jeet Singh Deol* (supra) case said that if the IO still needs to re-arrest an accused for custodial interrogation during investigation, the IO has to file an application before the concerned magistrate for custody, stating the reasons.

The IO would also need to explain the reasons for non-supply of the grounds of arrest to the accused. However, the application could be filed only after furnishing the grounds of arrest to the accused. Also, the application must have the endorsement of the immediate superior authority. It is only after the receipt of such application that the magistrate shall decide the same expeditiously.

Second, the investigation of the case shall be handed over to another officer by the superior authority, and he shall also direct departmental enquiry for the serious lapse of not providing the grounds of arrest in writing to the accused.

Additionally, the High Court may direct payment of compensation as part of the public law remedy for the violation of Article 22(2) of the Constitution, with liberty to the accused to avail his remedy under the private civil law. (R.K. Vij is a former IPS officer)

THE GIST

▼ The Supreme Court ruled that grounds of arrest must be communicated in writing, in a language the accused understands, at least two hours before remand proceedings

▼ If this safeguard is violated, re-arrest requires the magistrate's permission. The court also called for a change of investigating officer and a departmental inquiry into the lapse

GS 2: POLITY

INDIAN EXPRESS PAGE: 16

Citizens' march to defend right to vote sends a message to all institutions



THAROORTHINK
BY SHASHI THAROOR

WHEN TENS of thousands of citizens, Opposition leaders, students, and civil society advocates marched shoulder to shoulder toward the Supreme Court (SC) this Monday, the sight was nothing short of historic. Against a backdrop of police barricades, an excessive deployment of uniformed security personnel aimed at enforcing compliance (but mercifully restrained), and public transit suspensions at six Metro stations, ordinary Indians marched to protect the heartbeat of our republic: The right to vote. Monday's march was not merely a political demonstration; it was a resounding triumph for Indian democracy, proving that when the fundamental architecture of our constitutional rights is threatened, the spirit of our people remains unyielding.

For weeks, I have emphasised a stark truth across my columns, television appearances and public forums: The core issue today is that over 130 million Indian citizens have been arbitrarily deprived of their right to vote and choose their political representatives — with possibly more deletions to follow. To put that figure into perspective, 130 million people is larger than the entire population of Japan, Germany, or the United Kingdom. Stripping that many people of their franchise is not a mere administrative oversight by the Election Commission of India (ECI); it is an existential crisis for a

democratic constitutional republic. Franchise is the foundational bridge connecting the individual citizen to the state. When that bridge is broken for over 130 million citizens, popular sovereignty is shattered.

Let me be clear: I am not against cleaning the voter rolls of duplicate, deceased, or ineligible names that genuinely shouldn't be there. Maintaining an accurate electoral roll is a basic requirement of good administration. However, the fundamental legal and constitutional principle of "innocent until proven guilty" must apply to voting rights just as it does to our justice system. You cannot unilaterally deregister citizens and then place the burden on them to prove their eligibility. It should be the other way around: the onus must remain on the state to prove ineligibility through due process before any citizen's name is removed.

How did India's globally admired electoral democracy arrive at this perilous brink? The crisis stems from the hasty implementation of modified rules, a bizarre algorithmic identification of "logical discrepancies" that make no allowance for past clerical errors and typing mistakes, an arbitrary selection of the 2002 electoral register as definitive, an illegal modification of Form 6 and mass filings of Form 7, coupled with an opaque, centralised new software architecture that has systematically crippled local electoral governance.

Under the law, Electoral Registration Officers (EROs) in local communities served as the vital custodians of voter eligibility. Anchored in ground-level realities, EROs were empowered to exercise due diligence, verify residency, and ensure that no legitimate voter was unfairly disenfranchised. But this decentralised system of safeguards was overridden by algorithms and

centralised directives, effectively stripping EROs of their authority. As *The Indian Express* revealed from Goa, **decisions that determine whether a citizen retains voting rights are now rendered by centrally administered software, insulated from local scrutiny, the ERO's judgement and natural justice.** The new rules and procedures violate the spirit of the Representation of the People Act by allowing mass deletions without rigorous, individual-level notice or ground verification.

This iniquitous exercise must be suspended immediately. A robust democracy cannot endure on the promise of periodic elections alone; its basic strength rests entirely upon a transparent, competitive, and accessible electoral system. **Of the 82,000+ plus deleted voters whose appeals were heard in Bengal, 91 per cent were found to have been wrongly deleted; but lakhs more appeals are pending and those waiting to be heard were disenfranchised.** This erosion becomes existential: When the electoral process is compromised and executive convenience is prioritised over constitutional rights, the democratic framework collapses. When the state systematically deletes voters from the rolls and then undermines the public's right to peaceful popular protest, it cuts off the vital channels through which citizens express their collective will. This is why we must fiercely defend an electoral

ecosystem where every eligible citizen's vote is secured and autonomous institutions like the ECI act as impartial guardians of the public rather than handmaidens of the ruling apparatus.

The Opposition mobilisation called for clarity, urgency, and unwavering commitment to constitutional principles. The SIR must be suspended to halt further disenfranchisement; the irrational

and legally questionable rules and procedures under modified Forms 6 and 7 must be repealed; the software architecture rewritten so that EROs regain their rightful, statutory role as the ultimate authority on voter eligibility; and a transparent audit undertaken to restore every disenfranchised citizen to the voter rolls. **The ECI must reaffirm the core democratic principle that voter eligibility is presumed; the burden of proof must lie on the authorities to justify any removal rather than forcing citizens to re-prove their citizenship and residency. And the SC should review the entire process.**

Restoring procedural integrity is only half the battle; institutions require trusted leadership. An electoral umpire must be above suspicion, yet the current Chief Election Commissioner (CEC) has fundamentally lost the confidence of the primary opposition parties. In the interests of accountability for the maladministration of the SIR, he must resign. A compromised CEC who no longer commands trust across the political spectrum cannot credibly preside over the world's largest election system. Once a verified, inclusive electoral roll is in place, and the election process is demonstrably free, fair, and impartially conducted, all parties will honour the results.

Monday's march demonstrated that the conscience of the nation is wide awake. When thousands walked the streets of the Capital, carrying copies of the Constitution and demanding their fundamental rights, they sent an unmistakable message to every institution in the country: Democracy is not a gift bestowed by government decree; it is a right of the people. Until it is restored, the peaceful struggle for our constitutional rights will continue.

The writer is a fourth-term Congress MP from Thiruvananthapuram

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GS 2: SOCIAL JUSTICE (HEALTH)

INDIAN EXPRESS PAGE: 16

Livelihood scheme for women deserves better

THE CENTRE'S decision to let its flagship urban livelihoods scheme lapse without a successor is injudicious and perplexing. This is particularly so given the positive impact that the Deendayal Antyodaya Yojana-National Urban Livelihoods Mission (DAY-NULM) has had on the social and financial empowerment of women. Since its launch in 2014, the scheme has helped create 10.02 lakh self-help groups (SHGs), covering more than one crore women across cities. To risk leaving these beneficiaries adrift for want of continued support would be to betray the promise contained in slogans about women-led development invoked by parties across the spectrum.

Significantly, concerns over funding and the policy vacuum created by the end of NULM in October 2024, cut across party lines. Of the five states that have flagged the issue — Tamil Nadu, Karnataka, Maharashtra, Madhya Pradesh and Tripura — only the first two are Opposition-ruled. All five have sought funding to ensure continued support to SHGs and prevent disruption to their access to institutional credit and bank linkages. Addressing these concerns is critical to the larger goals of poverty alleviation and support to women's entrepreneurship. There is ample evidence of SHGs' capacity to advance women's social and economic empowerment — by improving access to credit and skills, building financial literacy and leadership, and increasing self-confidence and mobility. The impact of initiatives such as Didi ki Rasoi and Bank Sakhis under Bihar's JEEViKA scheme shows how such programmes can put money in women's hands while shifting them from dependent household roles to decision-makers. Kerala's Kudumbashree offers an even more expansive model, evolving from credit groups into a network involved in community kitchens, waste collection and training SHGs in other states.

States, too, must do their part. They have found resources for cash-transfer schemes; they must prioritise programmes for women that build enduring economic capacity. SHGs are institutions through which women acquire skills, networks, and a greater say in households and communities. To ensure these gains are sustained, efforts must be directed towards ensuring access to training, mentorship and institutional support. Going forward, it is not enough to expand SHG numbers — investment must also be made in the human resources, infrastructure, credit linkages and market networks that allow them to thrive.