

EDITORIAL HIGHLIGHTS

06-07-2026

GS 2: POLITY

THE HINDU PAGE: 08

The right to belong beyond official documentation

On June 24, 2026, a member of India's Ministry of External Affairs (MEA) released a startling statement. The Indian passport, the person said, is a "travel document" and not a "citizenship document". The assertion set off a minor storm. The reasonable question that followed from many was if the passport would do it, what document would?

Posed this way, the MEA's statement and the questions it raises become something of a red herring. A passport can only be issued to a non-citizen in exceptional circumstances, where the Government of India is of the opinion that it is necessary to do so in "public interest". Surely, therefore, barring those cases where this power is exercised, a passport must be seen as conclusive proof of a person's citizenship.

No doubt, it might be open for the government to establish under law that a person obtained the document by concealing the true status of his or her citizenship. But that does not mean a passport can be dismissed as merely a travel document.

Citizenship under scrutiny

The MEA's statement takes on an ominous heft when set against the milieu in which it was made. It arrives in the middle of the Election Commission of India (ECI)'s Special Intensive Revision (SIR) of electoral rolls in various States. It also comes in the wake of a pair of pronouncements by the Supreme Court of India, most recently on the validity of the SIR in Bihar and the ECI's power to scrutinise citizenship, and, before that, on the Assam Accord, in which the Court had much to say on how it conceives republican ideas of citizenship. Moreover, since an amendment to the Citizenship Act in 2019 (made operational in 2024), rules of naturalisation have been rewritten along religious lines. Taken together, all these developments must prompt us to ask an elementary question: what does it mean to be a citizen of India, who belongs, and on what terms?

The Constitution's answers to these questions, even if some find them indecisive, were reached with some amount of care and caution. Part II to the document, comprising Articles 5 to 11, settled the citizenship of those caught amidst the tragedies of Partition. Article 11 reserved to Parliament a seemingly plenary power to legislate and "make any provision with respect to the acquisition and termination of citizenship and all other matters relating to citizenship".

On a plain and literal reading, it might seem like the Union legislature was accorded unlimited authority to determine what factors can govern citizenship. Indeed, much of the contemporary defence of religiously founded citizenship laws



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has rested on such an interpretation. But a careful construal of the Constituent Assembly debates, as Gautam Bhatia has shown, suggests that the framers did not treat citizenship as a matter on which Parliament could do as it pleased.

The foundations of citizenship

Consider, for example, an amendment moved to the draft provisions of the Constitution by P.S. Deshmukh. He sought to include an express stipulation "that every person who is a Hindu or a Sikh by religion and is not a citizen of any other State, wherever he resides shall be entitled to be a citizen of India". The effort was met with sharp resistance. Among those opposing the move was Jawaharlal Nehru, who rejected the amendment outright, finding it "absurd on the face of it".

Alladi Krishnaswami Ayyar provided the most forthright response to it. He argued that India was plighted to the principles of a secular state. Therefore, there was simply no question of making a distinction between one kind of person and another on any "racial or religious" ground. Ultimately, Deshmukh's proposal was defeated, and B.R. Ambedkar's neutral citizenship clause was affirmed.

Thus, freestanding as the words in Article 11 might be, they must be understood in the context of their wider framing. They have in them an implied limitation drawn from the Constitution's most cherished and foundational commitments to secularism, equality, and non-discrimination. Parliament can decide the modalities of citizenship, but it cannot make religion a condition for entry.

At its conception, India adopted the principle of *jus soli*, that is a form of citizenship predicated on residence and birth. The Citizenship Act, 1955, saw the principle as its primary governing creed. But over time, the legislature moved away from the theory. First, in 1985, Section 6A was introduced into the Act to give effect to the Assam Accord, suspending the conferment of citizenship based on the dates on which people of "Indian origin" had come into India. Second, in 2003, the statute was further amended to deny citizenship to persons born in India even when only one of the parents of such person was an "illegal migrant".

In upholding Section 6A, the Supreme Court in October 2024, appeared to fortify two principles. It effectively saw no implied limitation in Article 11 and instead viewed the grant of power to Parliament to be virtually unlimited. It also appeared to lend constitutional respectability to an idea first promulgated by it in *Sarbananda Sonowal vs Union Of India & Anr.* (2005), that migration into Assam constituted "external aggression" against the State.

This rationale carried into its judgment in *Association for Democratic Reforms vs Union of India*, delivered in May this year, where the Court upheld the SIR exercise in Bihar, holding that the ECI may enquire into a person's citizenship, for the "limited" purpose of deciding eligibility for the electoral roll. The Court described the distinction it drew as "principled", between an adjudication on citizenship and on the administrative satisfaction concerning the continuation of a person's name on the electoral roll. Where the ECI is not satisfied with a person's assertion of citizenship, it ought simply to refer the case to the "competent authority" under the Citizenship Act.

But we have been down this road before. In Assam, during an earlier revision, voters marked "doubtful" were despatched to foreigners' tribunals and consigned to an endless bureaucratic maze to establish their citizenship. Today, therefore, we have ourselves a machinery in which a person need not be declared as a foreigner to be stripped of their basic rights. Instead, they are placed in a vacuum, neither confirmed nor cleared, with their rights being held in indefinite suspension.

Against this backdrop the MEA's clarification appears menacing. Running through all these exercises to establish citizenship is a common thread over the burden of proof. Where a resident could once rely on the state to take their citizenship as given, the onus today has been quietly shifted onto them. Almost any document adduced is seen as inadequate evidence. The Aadhaar card, we are told, is proof only of residence; the voter ID, only of prior registration; and now the passport, only of a right to travel.

The primacy of personhood

Under the Constitution, many of our basic privileges are premised on personhood. Article 14 guarantees equality before the law to "any person", and Article 21 the right to life and personal liberty to all. Citizenship is built on this foundation. It allows one the freedoms guaranteed under Article 19, to speech and expression, to carry on any trade or business, and to assemble peacefully. And it is the status of citizenship that guarantees one the statutory right to vote, to choose one's lawmakers, and to decide how one ought to be governed. Therefore, to be cast out of the position is to forfeit what Hannah Arendt called the right to have rights.

In a constitutional order where personhood comes first, the rules that determine who qualifies as a citizen must rest on more than the accident of paperwork. They must be built on what the Constitution most cherishes, on the equal dignity of every person and the right of each to equal protection of the law.

Paperwork cannot outweigh personhood in a constitutional democracy's citizenship framework

Hormuz to home, India's resilience in uncertain times

The Strait of Hormuz has long been recognised as one of the world's most critical maritime routes. Nearly a fifth of global oil consumption passes through this narrow waterway, making it indispensable to global energy security and international trade. Any disruption here immediately reverberates across shipping, freight, insurance and commodity markets.

As someone closely associated with the shipping industry, I witnessed this uncertainty first-hand. One of our company's vessels was among those caught amid heightened tensions in West Asia. We were confronted with an evolving security situation, uncertainty over navigation, and delays that disrupted commercial operations.

Yet, what stood out during this difficult period was the speed and coordination of the Indian government's response. Through continuous engagement with shipping companies, diplomatic channels, maritime authorities and international partners, Indian authorities ensured the safe movement of Indian-flagged vessels. That timely intervention inspired confidence at a time when uncertainty was at its peak. Equally reassuring was the government's unwavering focus on Indian crew and seafarers, ensuring that they remained protected amid one of the world's most challenging shipping environments.

This experience is just one example of India's growing ability to respond swiftly and decisively to external shocks. Whether during the COVID-19 pandemic, global supply chain disruptions, or recent geopolitical tensions in West Asia, India's institutional response has increasingly been characterised by coordination, agility, and strategic foresight.

Economic stability under pressure

India imports nearly 90% of its crude oil requirements, making it particularly vulnerable to disruptions in energy-producing regions. Rising crude prices, elevated freight costs and shipping delays could easily have translated into widespread inflationary pressures and economic uncertainty. Despite these headwinds, India's macroeconomic fundamentals have remained



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A calibrated approach and coordination marked India's response to global energy shocks

remarkably resilient. Inflation has broadly remained within the Reserve Bank of India (RBI)'s target band despite global commodity volatility, while India continues to be the fastest-growing major economy, supported by strong domestic demand, public investment and expanding manufacturing.

What deserves particular recognition is the manner in which the government has managed the energy challenge. Unlike in several countries where consumers experienced sharp increases in fuel prices or even supply shortages, India adopted a calibrated approach aimed at protecting households while maintaining macroeconomic stability. The government relied on a combination of supply diversification, diplomatic engagement, inventory management and coordinated action with public sector energy companies to ensure uninterrupted availability of petroleum products. Retail fuel prices have been managed prudently, helping to moderate inflationary pressures.

Energy management strategy

The government's strategy has been built around a whole-of-government approach under the leadership and guidance of the Prime Minister, with Ministries, State governments, municipal authorities, oil marketing companies and industry associations working in close coordination to ensure uninterrupted supplies of oil and gas while minimising disruptions to economic activity. In the case of natural gas, the government encouraged the use of piped natural gas (PNG) wherever existing infrastructure permitted. This flexibility was made possible because of sustained investments over the past decade. India's City Gas Distribution network has expanded from just 55 geographical areas in 2014 to over 300 today.

Similarly, exporters navigating rising freight charges, insurance premiums and shipping delays received targeted support. Measures aimed at strengthening export resilience, including liquidity support, logistics facilitation and simplified customs procedures, helped businesses continue servicing international

markets despite disruptions to maritime trade. India's strong merchandise exports growth of 16% during April-May FY27 is a clear reflection of this.

The RBI has also complemented government efforts by maintaining financial stability. Despite elevated global uncertainty, liquidity conditions have remained comfortable, financial markets continued to function smoothly, and the banking system remained well-capitalised. The RBI's steady communication and measures such as forex swap facilities, scheme for raising foreign currency deposits from non-resident Indians as well as rationalisation of taxes on foreign portfolio investors (FPI) have been critical in strengthening India's external sector resilience.

India was among the economies most vulnerable to this crisis, yet its policy response has been among the most effective. Across the world, governments grappled with surging fuel prices, elevated inflation and supply shortages. India's strategic response has ensured preserving macroeconomic stability and maintaining growth momentum.

India's preparedness

No economy today can completely insulate itself from geopolitical uncertainty. Commodity markets react instantly to conflict, shipping disruptions ripple across continents and supply chains remain deeply interconnected. A key learning from the Hormuz episode is that resilience is no longer built through emergency response alone. It is created through years of investment in infrastructure, diversified supply chains, institutional coordination and policy preparedness.

Over the past decade, India has steadily expanded refining capacity, diversified crude sourcing, strengthened strategic petroleum reserves, built gas infrastructure, modernised logistics networks and accelerated the transition toward cleaner energy. These investments become invaluable when external shocks test the economy. As India advances towards its vision of Viksit Bharat by 2047, it is institutional capability that will become an increasingly important competitive advantage.

GS 3: ENVIRONMENT THE HINDU PAGE: 09

India needs a second home for Asiatic lions

India's conservation of the Asiatic lion is widely celebrated as a remarkable success story. From a population which was reduced to just a few dozen in the early 20th century, the number of Asiatic lions has increased to approx. 891 today. Yet, behind this achievement lies a persistent policy failure: the inability to establish a second, geographically separate population. Scientific institutions, government bodies, and even the Supreme Court have long warned that without such a step, the species remains vulnerable to extinction from a single catastrophic event.

A second dwelling

The need for a second home for Asiatic lions is rooted in decades of government-backed research. Multiple reports of the Wildlife Institute of India have consistently emphasised that a single population confined to one landscape is inherently vulnerable. Studies conducted since the 1980s have concluded that threats such as epidemics, forest fires, or other natural disasters could potentially wipe out the entire species if it remains geographically concentrated.

This scientific consensus was formally acknowledged in the landmark Supreme Court judgment of April 15, 2013, which directed the translocation of Asiatic lions from Gujarat's Gir forest to the Kuno National Park in Madhya Pradesh. The Court made it clear that conservation must be guided by ecological principles rather than regional considerations, stating that a second population was essential for the species' long-term survival. The judgment explicitly recognised the risk that a single calamity could eliminate the entire population if it remained confined to one location.

Despite this clear directive, the translocation project has been stalled for over a decade. Gujarat has consistently resisted the relocation of lions outside the



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Reports by the Wildlife Institute of India have consistently emphasised that a single population confined to one landscape is inherently vulnerable

State, citing its success in conserving the species and raising concerns about habitat suitability elsewhere. This has created a policy impasse between scientific recommendations, judicial mandates, and State-level political considerations. While the Kuno National Park was prepared specifically to host the lions – by relocation of villages and habitat restoration among others – no lions have been introduced there.

Meanwhile, the ecological risks identified by experts have only intensified. The concentration of the entire global population of Asiatic lions within the Gir landscape makes them uniquely vulnerable to disease outbreaks. The 2018 outbreak of the Canine Distemper Virus among the population, which killed several lions and infected many others, serves as a stark reminder of this danger. Such diseases spread more rapidly in dense, socially structured populations, and their impact is amplified by the limited genetic diversity of the lions.

Government-supported studies and conservation plans have repeatedly highlighted that geographically isolated carnivore populations face extinction risks from both biological and environmental factors. In a single-site population, even non-recurring events – such as droughts, wildfires, or sudden prey decline – can have disproportionate effects. This is why conservation science advocates for a “metapopulation

approach”, where species are distributed across multiple habitats to reduce risk.

Recognising these concerns, recent policy initiatives such as Project Lion (2020) have attempted to revive the discussion on expanding lion habitats. There have been proposals to develop alternative sites such as the Barda Wildlife Sanctuary within Gujarat itself. However, experts argue that such sites, being geographically close to Gir, may not adequately address the core issue of risk diversification. A second population must be sufficiently distant to prevent the spread of disease or disaster across both populations simultaneously.

The delay in establishing a second home raises broader questions about environmental governance in India. It reflects a tension between national conservation priorities and State-level interests, where wildlife – though constitutionally recognised as a shared responsibility – can become entangled in regional and political considerations. The Supreme Court had clearly stated that Asiatic lions are a national heritage, not the property of any single State, yet implementation of this principle remains incomplete.

From success to security

Ultimately, the issue is whether India is willing to move from conservation success to conservation security. The current situation represents a paradox: a thriving population that remains ecologically fragile. Without establishing a second free-ranging population, the gains of decades of conservation effort remain vulnerable to reversal. The case of the Asiatic lion underscores a fundamental principle of modern conservation: numbers alone do not ensure survival; resilience does. Creating a second home is an ecological necessity; continued delay in implementing this vision risks turning a global conservation triumph into a preventable ecological vulnerability.



An Asiatic lioness with her two cubs at the Sakkarbaugh Safari breeding centre in Junagadh in 2025. VIJAY SONEJI

GS 3: ECONOMY & AGRICULTURE

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The real crisis in India's fisheries

Official claims that most of India's marine fish stocks are sustainable should not distract from the continuing degradation of the country's inshore fishing grounds; stronger governance of coastal waters and better management of mechanised trawling are essential for truly sustainable fisheries

FULL CONTEXT

Maarten Bavinck

India has a very large and old marine fishing population. Every day, both small-scale and mechanised trawl fishers go out to earn a living and provide the nation with food.

The Government of India recently released its latest prognosis of the country's ocean fisheries (February 11, 2026). Its press release emphasised that Indian marine fisheries are largely sustainable, suggesting the country has avoided the bane of international fishing, namely overfishing.

Official claims

Drawing on figures compiled by the Central Marine Fisheries Research Institute (CMFRI), the government said that most commercial fish stocks "are in good health". Furthermore, it stated that "91.1% of the 135 fish stocks evaluated in different regions during 2022 were found sustainable." If this assessment is accurate, it would be good news. However, there are good reasons to doubt whether it is indeed correct.

For one, the Food and Agriculture Organization (FAO) is far more reserved in its assessment of the condition of Indian marine fisheries than the Indian government seems to be. India's country profile argues that "India's marine fisheries production reached a plateau as most major stocks are fully exploited. [...]

Unregulated access to these fisheries resulted in significant overcapacity, especially of medium and small trawlers that compete over dwindling fishery resources with mostly impoverished small-scale fishers." This message is not half as buoyant as the one published by the Indian government.

I will not dispute CMFRI's conclusions or its methodology for calculating sustainability. After all, most of its procedures are veiled in secrecy. What is known, however, is that compared with many other fishing nations, CMFRI continues to rely primarily on landing data rather than stock assessments.

In other words, it calculates the availability of fish stocks in India's Exclusive Economic Zone (EEZ) – which includes up to 200 nautical miles (371 km) of sea area around the country – based on what fishermen catch. Even a layperson can understand that finding a certain number of shells on the beach does not necessarily predict the quantity of shells in the sea.

Other nations, therefore, make use of stock assessments at sea itself, thereby calculating how much aquatic life is available in certain waters. This is obviously the more reliable method to determine the health of fish stocks.

The Government of India cannot be blamed for not yet adopting this more costly form of stock assessment. But it does raise suspicions that the race to catch up with China, which is also infecting the fisheries sector, may also be inducing a hidden bias in the figures.

The decline of inshore ecosystems

Among the fishers I have spoken to over thirty years along the Tamil Nadu coast, the consensus is that catches have consistently gone down and that many species that were formerly available have disappeared. The government, however, seems to continue on the path of amplifying fish production figures from one year to the next.



GETTY IMAGES

Overfishing, however, is not the central issue here. The more pressing concern is the decline, if not the destruction, of the inshore benthic environment. Over the past year, numerous fisheries scientists and policymakers have described the inshore fishing environment as "destroyed". What exactly do they mean? India is surrounded by a relatively narrow continental shelf, where fishing is always the most productive. This continental shelf is broadest in Gujarat and a part of Maharashtra, but remains quite narrow along the rest of the sub-continent.

Generally speaking, one can assume that the territorial seas – a legal category referring to waters that lie within 12 nautical miles (or 22 km) from shore – largely overlap with the continental shelf. These waters provide favourable ecological conditions for commercially valuable species such as shrimp to feed, breed and grow.

But why do senior experts conclude this is no longer the case?

This is a complex question with many answers. Thus, one can point to the construction of dams in major rivers, which disallow land-based nutrients from entering the sea. One can also point to the ongoing destruction of mangroves, where fish breed, and to pollution that is entering the sea from various industrial, agricultural, and urbanising sources. Many scientists, and fishers too, point to such changes to explain the decline of fisheries. These factors obviously affect the inshore fishing zone more than they do distant waters.

Mechanised trawling and its cost

One of the many factors contributing to this decline is the dramatic and largely uncontrolled expansion of mechanised trawling.

It is good to remind ourselves first of all that semi-industrial trawling is not an Indian fishing method. It was introduced from abroad around 1960 and has since

expanded to gigantic proportions.

According to the same government press release, India now has 64,414 mechanised fishing vessels. These numbers are growing day by day as there are practically no restrictions on new entries. Moreover, existing vessels are continuously being extended and fitted with more powerful Chinese engines, enabling them to catch even more fish.

This oversized fleet of mechanised trawlers ploughs the inshore seabed in a continuous fashion. In heavily trawled areas, this results in a decline of all animal and plant life. It has also resulted in major conflicts with the numerous population of small-scale fishers who see their livelihoods imperilled. The problem is that regulations to protect the inshore fishing zone are almost non-existent. Yes, mechanised boat fishing is closed for two months every year, so as to allow for the rejuvenation of fish stocks. But the main tool to prevent unwanted trawling – the prohibition for mechanised boat fishers to operate within a geographic zone of 5 NM – lacks forcefulness.

There are two main reasons for this. First, coastal States lack sufficient staff or craft to patrol the inshore waters. Second, governments have precluded fishers from playing a helpful role in management. The result is that the ecology of the inshore fishing zone is continuously being degraded, and all fishers – small-scale and mechanised – are being pushed out to the offshore and the deep-sea fishing zones.

Rethinking fisheries policy

The Indian government is optimistic about the potential of deep-sea fishing and is encouraging fishers to make a shift. But the question is whether that potential, which is also being tapped by other fishing nations, is as bountiful as expected. The FAO estimates that "at best, only a marginal increase can be realised through exploitation of deep-sea resources."

More fundamentally, India's current fisheries policy is wasting the enormous potential of inshore waters. For one thing, it imposes extra expenses for fuel and technology on fishers so that they can actually travel to more distant waters. At the same time, it is closing its eyes to the dire need for proper management of inshore waters. Aside from addressing the problems of marine pollution, it also means curbing, if not reducing, mechanised boat fishing. This is more than a technical issue. Mechanised boat fishers, by way of their numbers and their political influence, now often stand in the way of proper management. This is witnessed, for example, in the case of the Palk Bay, which is located between India and Sri Lanka. There, the Indian fleet of mechanised boat fishers now pirates Sri Lankan waters to the detriment of small-scale fishers on the other side of the international border. Ownership of the island Katchatheevu does not make any difference in this respect.

The way forward

While the government's assessment paints an encouraging picture of Indian fish stocks, a more fundamental concern remains. The larger issue is that fishers, scientists and policymakers continue to decry the degradation of the inshore fishing grounds. A viable and truly sustainable fishery can only be realised if governance of the so productive inshore waters improves. For this, the government must adjust its perspective. This is in line with FAO's view that "Strenuous efforts are needed at federal and state levels to upgrade the country's capacity to manage its marine fisheries." In this context, CMFRI might also want to devote effort to studying what the condition of the benthic environment is actually like. This would provide a basis for deliberating on the best way forward. (Maarten Bavinck is emeritus professor of coastal resource governance, University of Amsterdam)

THE GIST

Food and Agriculture Organization presents a more cautious assessment of India's marine fisheries than official claims, warning that many major fish stocks are already fully exploited.

India's fish stock estimates rely largely on landing data rather than direct stock assessments, raising questions about how sustainability is measured.

Expanding mechanised trawling and weak enforcement of coastal fishing regulations are placing increasing pressure on inshore ecosystems and small-scale fishers.

GS 3: SCIENCE AND TECHNOLOGY

INDINA EXPRESS PAGE: 12

In AI Age, America will need to lead with renewed generosity



SAM PITRODA

AS AMERICA celebrates 250 years of independence, I write with deep gratitude, great admiration and growing concern. I arrived in the US 62 years ago as a young immigrant from India. America and Chicago opened doors to me, gave me education, work, freedom, opportunity, confidence and the space to build a family and dream. I experienced the power of America's Constitution, the resilience of its democracy, the fairness of the rule of law, the openness of its universities, the energy of its entrepreneurs and the love of the American people.

For more than six decades, about 25 per cent of independent America's life, I have lived the American experiment. It is imperfect, yet extraordinary. America's greatness has never been only its wealth or military power. Its deeper greatness has been its spirit, optimism, openness, innovation, and belief in the individual.

America helped invent the modern world. Electricity, the telephone, the transistor, computers, the Internet, mobile communications and now AI have transformed the lives of billions. Much of this progress came from America's unique ability to combine science, capital, universities, immigration, entrepreneurship and freedom.

America also showed moral imagination after World War II. Rather than celebrating victory, it helped rebuild Europe and Japan. It invested in alliances, institutions and understood that a stronger world would also make America stronger. This outward-looking America inspired the world.

But as we celebrate, we must also be honest. The history of humanity — including that of America — includes colonisation, slavery, violence, racism, exclusion, hunger, poverty and inequality. Too often, power has been used to dominate. Too often, progress has uplifted some while leaving many behind.

America's genius has been its ability to confront its contradictions and renew itself. Today, humanity faces another turning point. AI will reshape every profession, institution and society. Climate change threatens the planet. Wars continue to destroy lives. Democracies are under press-

ure. Public trust is declining. Technology is connecting us, but also dividing us. No nation can solve these problems alone.

That is why America must resist the temptation to define the future mainly as a competition with China. The competition is real. America must invest in science, technology, education, infrastructure and national strength. But it did not become exceptional because it feared another nation. It became exceptional because it imagined a better future.

At 250, America should ask a larger question: How can we help humanity rise to the next level?

This is the moment for a new American pledge — humans deserve equal respect and dignity; opportunity must not depend on birth, race, gender, religion, geography or wealth; technology must serve people and the planet; democracy and the rule of law must be protected; freedom must include responsibility; prosperity must be shared.

AI gives America a historic opportunity to lead again — not merely in building powerful machines, but in building a more humane world. AI can help educate every child with a personal tutor. It can help doctors reach remote villages. It can improve agriculture, reduce waste, accelerate scientific discovery and make governments more responsive. But AI can also concentrate power, destroy trust, deepen inequality and manipulate minds.

This is where America's founding ideals remain essential. Liberty, justice, equality before the law, freedom of thought and respect for human dignity can be the foundation for the AI age as well. To make America great is not enough. America is already great. The larger task is to make humanity greater.

On this 250th birthday, let us celebrate the American Dream. But let us also expand it. The first 250 years were about building a nation. The next 250 should be about helping humanity dream bigger — with equal respect, equal dignity, equal opportunity and equal possibility for all.

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GS 2: INTERNATIONAL RELATIONS INDINA EXPRESS
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From the Iran conflict, four geopolitical shifts India cannot afford to miss



OVER THE BARREL
BY VIKRAM S MEHTA

THE FOG of conflict in the Middle East has lifted somewhat, and one can now discern the geo-economic and geopolitical changes it has wrought. Whether these changes dissolve over time and conditions revert to the status quo ante February 28, the day American bombers took out the leadership of Iran, or calcify into an invariant structural shift remains to be seen. Irrespective, petroleum-import-dependent countries like India should factor these changes into their discussions on energy and national security.

In this article, I identify four such changes.

First, diminishing confidence in America as a guarantor of security. Other than the most hardened MAGA acolyte, everyone agrees that America was worsted by Iran in this conflict. It failed to achieve any of its stated objectives (regime change, elimination/dilution of Iran's cache of weapons-grade uranium and degradation of Iran as a regional power) despite, according to its Central Command, American bombers flying 10,000 sorties, hitting 1,30,000 targets inside Iran, destroying 85 per cent of Iran's missile manufacturing capabilities and 70 per cent of its missile launch infrastructure and sinking most of its navy between February 28 and April 8, the date of the first ceasefire.

Moreover, America failed to protect its Gulf allies from Iranian missiles and drones. Saudi Arabia, the UAE, Qatar, Bahrain and Kuwait all suffered physical and economic damage during the conflict. These countries had permitted America to establish military bases in their territory in exchange for the assurance of such protection. US Secretary of State Marco Rubio recently toured the region to smooth ruffled feathers, but more than anything he may have said, I suspect it was the words of his predecessor, Henry Kissinger, that resonated with the Middle East leaders: "It may be dangerous to be America's enemy, but to be America's friend is fatal". This dent in confidence opens up space for non-Western countries to deepen their security relationships in the region and, in particular, creates an opportunity for India's defence-related manufacturing and technology companies to explore mutually beneficial opportunities.

Second, the emergence of "choke points" as a lever of power. The Strait of Hormuz, through which 20 per cent of global oil supplies flow, has long been recognised as a potential source of market disruption, but essentially only in analysis. Conventional wisdom has held that Iran does not have the capability to enforce a shipping blockade. Indeed, the one time it sought to do so in 1988, the US 5th Fleet blew up two Iranian frigates, demolished oil platforms and cleared the sub-sea mines within days. Oil tankers were barely impeded. This wisdom has now been upended. Through a combination of missile threats, attacks by small but fast speed boats and adroit social messaging, Iran did halt shipping traffic. The economic and political impact was a

sharp rise in oil prices — it peaked at \$126 per barrel in April, up from \$75 per barrel before the commencement of bombing — imposition of demand-reduction measures across Asia, the drawdown of strategic reserves and a political backlash. One reason President Donald Trump sought peace was concern that the rise in gasoline prices at the US retail forecourt would hurt his party's electoral prospects in the November mid-term elections and render him a lame duck president for the balance of his tenure.

Iran's success in leveraging its geographic position for military advantage has focussed attention on "choke points" as a source of asymmetric technological, competitive and strategic power. The former UK PM, Rishi Sunak, has in an article advised countries/corporates not to seek control over the entirety of an integrated technology value chain but to create a niche position that can give them an "unassailable edge". He cites Arm Holdings, whose chips are in 99 per cent of all smartphones, TSMC, the Taiwanese company that makes 70 per cent of all advanced semiconductor chips, and ASML, the Dutch manufacturer of extreme ultraviolet lithography machines, as successful examples of this approach. He could have added China's dominance of rare earths to this list.

Clearly, not every country/corporate can create such a choke point. Those who cannot must find ways of reducing their vulnerability. The Gulf countries are expanding/building overland pipelines as an alternative export route to the choke point of Hormuz. India can reduce its exposure by expanding the storage capacity for strategic petroleum reserves from the current roughly eight days to at least 30 days, or better still, 60 days.

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Third, OPEC is now a spent cartel. The UAE has left it; several other countries are reportedly on the verge of leaving, and Iran is at military loggerheads with the Arab members. Had anyone asked experts to forecast the price of oil in the event of closure of the Strait of Hormuz, they would have indicated a range between \$150 and \$200 per barrel. In fact, other than the one-day peak of \$126/bbl, prices ranged in the \$90s. The reason for this relatively moderate trajectory was the reduction of imports by China from 11.4 mbd in February to 6.4 mbd in May, the drawdown of strategic reserves by the IEA and increased production from non-OPEC producers. Together, these factors illustrated the cartel's weakening influence.

Finally, the reemergence of Iran as a "responsible" state actor. I am no expert on Iranian politics, but from what I have read, the balance of power in the country is shifting towards leaders who, whilst Islamic, are not radical, nor ideologically driven to defend the principles of the 1979 revolution (notwithstanding the week-long funeral planned for Ayatollah Khamenei). They are technocratic, pragmatic and nationalist. They recognise public discontent cannot be indefinitely contained, and policy focus must now be on economic growth.

India has civilisational connections with Iran. Before the US sanctions, New Delhi received oil supplies from Tehran on superior credit terms. It should support Iran's developmental efforts with technical, manpower and financial assistance. This will not only strengthen ties but also enhance the probability of preferential access to energy.

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GS 3: AGRICULTURE

INDIA EXPRESS PAGE: 13

Rice-to-ethanol policy is deepening economic and environmental stress



FROM PLATE TO PLOUGH
 BY ASHOK GULATI, RITIKA JUNEJA AND PURVI THANGARAJ

INDIA PRODUCED 154 million metric tonnes (MMT) of rice in 2025-26, surpassing China to become the world's largest producer. India is also the top rice exporter, with exports of 24.5 MMT in 2025. This accounts for roughly 40 per cent of the global rice trade (61.3 MMT), exceeding the total exported by the next four largest exporters — Vietnam, Thailand, Pakistan and Cambodia. India also gives free food (Rs 5kg/person/month) to about 800 million people under the National Food Security Act (NFSA), of which almost two-thirds is rice. Even after this, the Food Corporation of India (FCI) held rice stocks of almost five times the buffer norm as of April 1. In 2024-25 (FY25), the carrying cost of this extra buffer stock was Rs 10,712 crore. The government has decided to divert significant quantities of broken/damaged rice to ethanol production to reduce these stocks and cut down carrying costs. In FY26, almost 5 MMT of rice has been used to produce ethanol. The economic cost of rice to FCI in FY27 is likely to be Rs 44/kg, while it is being given to ethanol plants at roughly Rs 23/kg, renewing the food-vs-fuel debate and raising questions about who is subsidising whom.

How did India, a country that lived from "ship to mouth" in the mid-1960s, become the world's largest rice producer, exporter, free distributor, and ethanol maker from the grain? The Green Revolution's success is only one part of the story. The other, more recent and disturbing, is the story of subsidies, which are wreaking havoc not only on the fisc but also on the environment, through higher greenhouse gas (GHG) emissions, soil degradation, groundwater contamination and biodiversity loss. Let us delve deeper and explore how India can rationalise rice pol-



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icies for a financially and environmentally sustainable future.

Three interlocking policies seem to be responsible for this situation. First, the open-ended procurement at the minimum support price (MSP). Although the MSP for paddy is Rs 2,369/quintal (2025-26), states often outbid each other. Chhattisgarh pays about 40 per cent above MSP, Telangana about 20 per cent, while others, such as Andhra Pradesh, Odisha, Punjab and Haryana, have their own variants of this competitive largesse either in the form of input subsidy or bonus on top of MSP. **Second, free or near-free power across the rice belt.** Since rice is a flood-irrigated crop that demands up to 25 irrigations per season, free power is effectively a licence to mine groundwater without consequence. **Third, urea is sold at a price that bears no relation to its cost.** The retail price of urea has been frozen at Rs 242 per 45-kg bag for years, with the government absorbing 85-90 per cent of the economic cost. India's own landed import price for urea had spiked to \$935-\$959/tonne in May

The ethanol programme in itself — is at least 20 per cent. However, fixing that ethanol price at a fixed share of FCI rice is counterproductive

— thanks to a modicum of cooling in the Strait of Hormuz conflict, the price now has dropped to a little less than half this amount. **Yet, this huge arbitrage drives chronic over-application of urea on paddy fields as well as diversion to other industries and across borders.** According to an ICRIER study, the combined subsidies (power, fertiliser and canal water) for paddy cultivation in Punjab amounted to Rs 38,973/hectare in 2023-24. These distorted and politically motivated policies of bonuses over MSP, coupled with highly subsidised power and fertilisers, have resulted in FCI's stocks overflowing. Rather than fixing the distorted incentive structure that has created such piles of rice, the government has chosen a second exit valve: Pour it into ethanol distilleries.

The ethanol blending programme is not a bad idea, in itself — it involves at least 20 per cent blending. However, **mandating that ethanol producers source a fixed share of feedstock from FCI rice is counterproductive.** This is like going back to Soviet-era con-

trols. Bureaucracy and politicians love controls as they benefit from rent-seeking. **Industry wants freedom to choose the most efficient feedstock — whether maize, sugarcane, or rice — which government policies don't permit.** So, the two strike a deal — rice, whose economic cost to FCI is Rs 44/kg, is sold to ethanol plants at Rs 23/kg on the justification that it is broken and damaged.

Production of a kilogram of rice requires, on average, about 4,000 litres of irrigation water. Even if one assumes half of it percolates back to aquifers, the other half is absorbed partially by the plant, and the remaining evaporates. **Transplantation, the dominant practice in rice cultivation, emits large amounts of methane, which is 25 times more potent than carbon dioxide.** And when states like Punjab and Haryana use almost 250/kg of fertiliser per hectare, they emit almost 5 tonnes of carbon dioxide/ha as the plant absorbs not more than 35-40 per cent of nitrogen — the rest goes into the environment as nitrous oxide, which is 273 times more potent as a GHG than carbon dioxide, or leaches into groundwater, contaminating it with nitrate. The contamination has been linked to blue baby syndrome, thyroid, diabetes and increased cancer risk. Why are we imposing such hazards on ourselves?

This must change. Otherwise, a boon of technology will become a bane of humanity. **Wisdom lies in changing the course of the MSP policy.** No bonuses, and limit the procurement in all states to not more than 40 per cent of its production. No compulsion on ethanol plants to use rice from FCI. **Maize is a much better option for ethanol production.** Limit the free supplies under PDS to only the most vulnerable — antyodaya — and charge the rest at least half the MSP. **Promote direct-seeded rice to conserve water.** And above all, **fix fertiliser-related issues by moving from subsidies to income support to farmers and decontrolling fertiliser prices.** If the Narendra Modi government can implement such reforms, it will do a great service to India's farmers and our planet.

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KIRIT S PARIKH

West Asia crisis has made India more energy secure

BY THE end of June, oil prices had come down to \$74 per barrel, the pre-crisis level of early February. I must confess to being pleasantly surprised by the fall in prices. Iran's bombing of the Middle East's oil infrastructure made me think it would take many months for global supply to recover and crude prices to fall to pre-crisis levels. However, price is an outcome of both supply and demand. With high prices, some reduction in consumption can be expected. But the demand for Gulf oil has also fallen because countries diversified their sources, and took measures to enhance long-term oil security.

India has managed the crisis very well. Supply was ensured. Hardly any retail outlet ran dry. Domestic consumption was reduced with 20 per cent ethanol blending. Electric mobility was pushed. Consumers were protected. Prices were not increased in step with import prices, and oil marketing companies and the government bore a large part of the burden. This was justifiable if the government expected the crisis to last no more than three to four months. Fortunately, it was proved right. The revenue forgone was Rs 1.7 lakh crore. The consumer price of petrol was later increased by Rs 3 per litre, around a 7 per cent increase. The price increase is by far the smallest among major oil-importing countries.

More than half of the LPG consumed by Indian kitchens would arrive through the Gulf, and that suddenly stopped. Government ac-

tion was decisive. An LPG control order, issued within eight days of the disruption, directed domestic refineries to increase production. Within seven days, production increased from 35,000 to 54,000 tonnes per day. The regulated price of LPG was kept at Rs 942, and for the beneficiaries of the Pradhan Mantri Ujjwala Yojana at Rs 642, with a direct benefit transfer of Rs 300 per month to nearly 10.6 crore households. Commercial LPG supply was restrained for some time, and industrial and commercial users were encouraged to use other fuels.

The management of supply has been built on infrastructure developed over the last decade or so. Between 2011 and 2022, LPG import terminals doubled, to 22, increasing the country's LPG import capacity from 12 MMTPA to 32.3 MMTPA. At the same time, the city gas distribution network coverage increased from 55 cities to 300-plus cities. From 2011 to 2022, LNG import terminals doubled, and India expanded its crude oil sourcing network from 27 to 41 countries, which facilitated supply diversification and inter-fuel substitution.

India was also able to get a number of its ships through the Strait of Hormuz despite the blockade. This required coordination between more than one institution and ministry. The Ministry of Petroleum and Natural Gas identified and shared the list of priority vessels carrying India-bound cargo with the Ministry of Ports, Shipping

and Waterways. The latter compiled additional vessel-specific information and forwarded it to the MEA, which liaised directly with the Iranian embassy in New Delhi to seek clearances, while simultaneously instructing the Indian embassy in Tehran to expedite the processing of such requests by engaging with Iranian authorities. The Navy then coordinated with the vessels to ensure their safe passage through the Strait of Hormuz. This approach ensured that requests were pursued through both capitals at once, reducing the turnaround time for approvals.

India has long been concerned about disruptions in oil and gas supply from the Gulf. Its bilateral engagements with several countries, which predate the crisis, facilitated the diversification of imports. India continues exploration efforts domestically as well as beyond the country's shores and has procured oil and gas assets abroad. Thus, in a sense, the crisis has made India a little more energy secure.

However, the challenge for the government is not over. Consumers have been protected at a high cost to the government and oil marketing companies. The government faces a challenge in keeping inflation in check, the fiscal deficit on target and facilitating investment to ensure growth, while keeping expenditure on education and health on track. One hopes it will attain these targets.

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NIKITA AND BHARGABI GHOSH

In climate fight, panchayat must partner in planning

ACCORDING TO data compiled by AQI, in 97 Indian cities featured among the world's top 100 hottest cities in May. Banda in Bundelkhand, Balangir in Odisha, Sasaram in Bihar and Varanasi in UP all hovered around 47-48°C. A few weeks before, the Union Cabinet approved India's revised Nationally Determined Contributions under the Paris Agreement, pledging to expand its carbon sink through forest and tree cover, increase non-fossil power capacity to 60 per cent, and reduce GDP emissions intensity by 47 per cent from 2005 levels by 2035. India has a strong record of meeting climate commitments. Yet the institutions dealing most di-

rectly with water stress, changing rainfall patterns and livelihood disruptions — gram panchayats — remain at the margins of climate planning.

Across rural India, climate change is reshaping everyday life. Farmers who once planned their sowing around fairly predictable monsoons now find themselves guessing when the rains will arrive and whether they will last long enough to sustain a crop. In many places, wells run dry before summer has ended and households are changing what they grow and eat. This is particularly consequential when set against rural-to-urban migration that is reshaping India's demographic geography.

It has been over three decades since the 73rd Amendment identified 29 subjects for devolution to gram panchayats, including water management, agriculture, social for-

estry and natural resource management, which sit at the centre of India's adaptation challenge today. The 16th Finance Commission, for the first time, integrated climate factors into its devolution recommendations. But the Panchayat Advancement Index 2.0 (PAI) and the Panchayat Devolution Index both show that functional devolution has declined in the same period. Without effective financial transfers, meaningful procedural authority, and genuine planning power, gram panchayats struggle to effectively respond to climate change.

There are many proven local models

When local representatives have opportunities to exchange what works, solutions travel faster

that demonstrate what becomes possible when gram panchayats are supported. Hiware Bazar in Maharashtra transformed a drought-prone landscape through watershed management, helped in part by lessons from neighbouring Ralegan Siddhi. A water conservation model from Bela in Maharashtra has direct relevance for a gram panchayat facing drought in Garhwal. The way a gram panchayat in Borkaro has used District Mineral Foundation funds for ecological restoration offers a working template for similar efforts in Chhattisgarh. Weather-risk management practices from Kerala's coastal gram panchayats can inform flood-prone communities in Assam. The Conference of Panchayats initiative, which has engaged more than 1,100 gram panchayats across five states, has shown that when local represen-

tatives have opportunities to exchange what works, solutions travel faster.

Three things would give ambitious climate targets a local foundation. First, the NAPCC and State Action Plans should formally bring gram panchayats in as planning partners with defined responsibilities and financial transfers. Second, PAI's nine thematic areas should connect high-performing panchayats with lagging ones in the same region, so that solutions move laterally rather than top down. Third, the 16th Finance Commission's climate-linked devolution must be paired with the procedural authority for gram panchayats to plan, not only to spend.

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AJAI MALHOTRA

INDIA'S TRANSITION to electric mobility and clean energy requires secure access to critical minerals, especially nickel. The world's largest nickel reserves lie in Indonesia, where Chinese investment has established a dominant position in downstream processing. The future of clean energy will depend as much on nickel-processing plants as on EV factories. India may have only a few years to establish a meaningful presence in Indonesia's nickel value chain. Prime Minister Narendra Modi's visit to Indonesia from July 6 to 8 could offer India its best opportunity to secure a place in the critical mineral value chains that will shape its energy transition and supply-chain resilience.

The visit reciprocates President Prabowo Subianto's 2025 visit to India. It opens a six-day Indo-Pacific tour that will also take PM Modi to New Zealand and Australia. Indonesia is among India's oldest partners in Asia. Indian cultural links with Java, Bali and Sumatra stretch back centuries, while the 1955 Bandung Conference helped lay the foundations of the Non-Aligned Movement. Today, that shared legacy finds expression in a strategic partnership spanning the Indian Ocean and the wider Indo-Pacific. The world's largest archipelagic state, Indonesia straddles the Malacca Strait, one of the world's busiest maritime arteries, whose western approach India guards. As Asia's two largest democracies, their shared boundary in the Andaman Sea makes cooperation on maritime security and connectivity imperative. India's Act East Policy, too, aligns closely with Indonesia's maritime ambitions — Sabang port in Aceh province illustrates the strategic potential. Building on the 2018 Comprehensive Strategic Partnership, the PM's visit aims to translate strategic convergence into practical cooperation on critical minerals, connectivity, healthcare, space, digital public infrastructure and tourism.

Indonesia also possesses cobalt, bauxite, tin and rare earths. India requires a sustained commercial presence across Indonesia's critical-mineral value chains through joint ventures, upstream equity and mineral-processing partnerships. The strategy's success will depend on Indian industry's ability to match the speed of its Chinese counterparts in establishing a meaningful presence in Indonesia's nickel value chain. If PM Modi's Jakarta visit propels that conversation, President Prabowo's expected visit to India for the BRICS Summit in September could provide an early opportunity to advance it.



Indonesia is India's second-largest ASEAN trading partner, but economic ties remain below potential. India runs a trade deficit of about US\$20 billion. The two governments aim to expand bilateral trade to US\$100 billion by 2030.

If critical minerals represent the visit's longer-term strategic opportunity, defence cooperation might provide its most tangible immediate outcome. Substantial progress in Jakarta towards acquiring BrahMos supersonic cruise missiles would strengthen Indonesia's deterrent capability. Building on the BrahMos export to the Philippines, it would burnish India's credentials as a reliable security partner for countries seeking stronger defence capabilities without becoming entangled in great-power rivalries.

China's growing maritime assertiveness forms the strategic backdrop. Beijing's "Nine-Dash Line" overlaps Indonesia's Exclusive Economic Zone around the Natuna Islands. While India works through arrangements such as the Quad, Indonesia maintains close economic ties with China even as it expands maritime cooperation with India and others.

As Southeast Asia's largest economy and a leading ASEAN voice, Indonesia has a central place in India's Indo-Pacific strategy. The two countries share an interest in preserving freedom of navigation, maintaining regional stability and strengthening ASEAN centrality. Indonesia's BRICS and Indian Ocean Rim Association memberships broaden the platforms through which both countries can advance shared interests.

Thanks in part to alphabetic seating at the UN General Assembly, Indian and Indonesian diplomats have for decades worked alongside one another, developing camaraderie and trust that underpins the bilateral partnership.

Connectivity is of growing importance. Limited direct flights, inadequate shipping links and restrictive visa protocols constrain ties. Initiatives linking the Andaman and Nicobar Islands with Indonesia's Aceh Province deserve greater momentum.

PM Modi's visit signals India's intent to deepen engagement with one of its most consequential maritime neighbours. The two countries do not merely share an ocean; they share responsibility

PM's Indonesia visit could lay foundations of nickel diplomacy