

U.S. deal will not include sensitive sectors: Goyal

Commerce Minister says the deal will benefit labour-intensive export sectors, blames Opposition for not allowing a statement in Parliament; he says full details will be released after deal is inked

T.C.A. Sharad Raghavan
NEW DELHI

The trade deal with the United States, announced by U.S. President Donald Trump and Prime Minister Narendra Modi on social media late on Monday night, will exclude sensitive agricultural items and dairy, Commerce Minister Piyush Goyal said on Tuesday, adding that the details would be made public "soon".

Under the deal, the U.S. has agreed to lower its 25% "reciprocal" tariffs on India to 18% and entirely remove the additional "penalty" tariffs of 25% it had imposed on India for its import of Russian oil.

"The trade deal finalised by India with the U.S. is the best among India's neighbours and its competitors," Mr. Goyal told presspersons. "PM Modi has always protected the agriculture and dairy sectors and has never compromised on their interests. In the U.S. trade deal as well, India's sensitive sectors of agriculture and dairy have been excluded," he said.

Beyond this, he did not specify any other details of what India had conceded



The reciprocal tariff was set by the U.S., and they were the ones who had to reduce tariff, so when they did reduce it to 18%, that news would obviously come from the U.S.

PIYUSH GOYAL
Union Commerce Minister



to the U.S. Nor did he address Mr. Trump's claims that India would stop buying Russian oil, increase oil purchases from Venezuela, and increase overall purchases from the U.S.

Opposition blamed

He attacked the Leader of the Opposition in the Lok Sabha, Rahul Gandhi, the Congress, and its allies, saying it was because of their actions in Parliament on Monday that he was conveying the information on the trade deal at a press conference and not on the floor of the House. "Ordinarily, we would have wanted to speak in Parliament about this," he said.

"But, as you all saw, the way the Opposition, especially the Rahul Gandhi-led Congress and their allies, the DMK, the Trinamool Congress, and the SP, behaved in Parliament,

reaching the Speaker's dais and insulting him, we have had to speak before you outside the House."

He said that the deal was in the "final stages of detailing" between the negotiating teams of the two countries. "As soon as the final understanding of the deal is inked, the joint statement is finalised, and technical processes are completed, full details will be shared," he said.

In a rare public admission, Mr. Goyal acknowledged the impact of the U.S. tariffs on several sectors.

"Our farmers and exporters were all affected by the 50% tariffs," he said.

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Industry bodies laud tariff deal

T.C.A. Sharad Raghavan
NEW DELHI

Industry bodies and leaders in both India and the U.S., have welcomed the announcement of a deal between India and the U.S. under which tariffs on India are set to be slashed to 18%.

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Equity, rupee markets rise on tariff cut

Ashokamithran T.
MUMBAI

Clarity has emerged in India's equity, rupee and precious metal indices after the reciprocal tariff on Indian imports to the U.S. was reduced to 18%.

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U.S. deal will not include sensitive sectors: Goyal

“Our marine exporters were facing difficulties. The textile sector had also been facing the need for reduced tariffs. This is a deal that will protect the interests of every Indian and provide huge opportunities for all the people of India, and will protect the sensitive sectors, including agriculture and dairy,” the Union Minister said.

Mr. Goyal said, “It will open up huge opportunities for our labour-intensive export sectors such as textiles, apparel, plastics, home decor, leather and footwear, gems and jewellery, organic chemicals, rubber goods, machinery, and aircraft components.”

Trump’s assertions

Mr. Goyal also sought to address questions from the Opposition as to why the deal was first announced by Mr. Trump. “The reciprocal tariff was set by the U.S., and they were the ones who had to reduce tariffs, so when they did reduce it to 18%, that news would obviously come from the U.S,” he explained.

In his post on Truth Social, Mr. Trump also made several assertions about what Mr. Modi had allegedly agreed to on India’s behalf. One of these was that India would buy “over \$500 billion dollars [sic] worth of U.S. energy, technology, agricultural, coal, and many other products”.

Exporters relieved, farmers upset over trade agreement

A. M. Jigeesh
NEW DELHI

Exporters of agriculture products, fisheries, and seafood were relieved after the announcement of the trade deal between India and the United States, but farmers expressed concern about the possible import of crops such as soybean, cotton, maize, and wheat, and trade unions warned that the deal would hurt Indian industries and workers.

"We are back in the business now," Alex Ninan of the Seafood Exporters Association of India (SEAI) told *The Hindu*. "We are confident that with the conclusion of the trade deal and lowering of tariffs to 18%, quantum of export of seafood from India to U.S. will show an increase and soon reach back to the previous levels," said SEAI president G. Pawan Kumar.

The Samyukt Kisan Mor-

cha (SKM), an umbrella group of farm outfits, termed the deal as a "betrayal of the people".

Allowing zero per cent import tariff on U.S. goods is a surrender to the pressure of U.S. imperialism, the SKM said.

"This trade deal to allow Indian markets to be flooded by highly subsidised U.S. agricultural products will devastate the entire peasantry in India. The U.S. has only 18.8 lakh farmers as per the recent survey in 2024, compared to 14.65 crore operational holdings in India as per the agricultural census of 2015," the SKM said, urging farmers to join the general strike on February 12.

The Centre of Indian Trade Unions said if the deal comes into effect, it will be the most deadly action against the interests of workers and peasants, and Indian economic sovereignty at large.

Trade deal: unanswered questions remain

EXPLAINER

Suhasini Haidar
NEW DELHI

The announcement that the U.S. will reduce "reciprocal" tariffs on India from 25% to 18% and drop the 25% punitive tariffs for Russian oil imports, is a major relief to Indian exporters, and indicates that relations between the two countries are on the mend after a year of severe tensions.

The move on slashing U.S. tariffs was made during External Affairs Minister S. Jaishankar's visit to Washington to attend a Critical Minerals Ministerial meeting, his seventh visit to the U.S. since Donald Trump's election as U.S. President. It also

comes just weeks after the new U.S. Ambassador Sergio Gor took charge in Delhi, indicating a fresh attempt at resetting ties.

However, differences remain between Prime Minister Narendra Modi's version of the agreement and Mr. Trump's version,

which will need to be reconciled.

Where is the negotiated text of the trade deal?

Mr. Trump's reference to a trade deal left it unclear whether he is referring to a deal over cutting reciprocal tariffs, or to the larger "first tranche" of the India-U.S. Free Trade Agreement (FTA) that has been negotiated between trade teams after Mr. Modi's visit to Washington in February

2025. As a result of the FTA, both sides were expected to drop tariffs, but no details of the FTA, or a negotiated text, have thus far been released by either government.

Tariffs to zero?

Mr. Trump's claim that India would "reduce Tariffs and Non-Tariff Barriers against the United States, to ZERO", has not been confirmed by New Delhi, nor has there been any explanation about which lines would reduce to zero. In addition, questions about market access, especially in agricultural sectors like soybean and dai-



On the same page: External Affairs Minister S. Jaishankar with U.S. Ambassador to India Sergio Gor in New Delhi. PTI

ry which India has been reluctant to open, remain unanswered. U.S. Agriculture Secretary Brooke Rollins said in a post that the new U.S.-India deal will "export more American farm products to India's massive market, lifting prices, and pumping cash into rural America".

Indian investment in the U.S.

In his post, Mr. Trump said that Mr. Modi also "committed to buy American" with over \$500 billion dollars for U.S. energy, technology, agriculture, coal, and other products. The government declined to

comment on whether any such commitment has been given, but the size of the figure indicates this is meant to be done over several years, and with multiple sectors involved. It is important to remember that India-U.S. bilateral trade in goods stands at about \$131 billion at present, and India's current investment in the U.S. is just over \$40 billion.

Has India agreed to drop Russian oil?

In his post on Monday, Mr. Trump said that Mr. Modi had "agreed to stop buying Russian Oil, and to buy much more from the Unit-

ed States and, potentially, Venezuela", adding that this would help end the war in Ukraine. The Ministry of External Affairs has not responded to requests for comment on this issue. While the government insists that it has no part to play in these commercial decisions, that is contradicted by Mr. Trump's statement that Mr. Modi had agreed to cutting Russian oil.

Will India have to give concessions on Iran?

Mr. Trump has indicated that the U.S. wants India to buy Venezuelan oil in lieu of Russian oil. This may be a relief for India, but raises questions over its autonomy on important strategic decisions. The U.S. has also threatened to impose 25% tariffs on countries "doing business" with Iran, which includes India, and Washington plans to end its sanctions waiver on Indian investment in Iran's Chabahar port. In a departure from the past, the Union Budget presented on Sunday contained no allocation for Chabahar.

JAISHANKAR, RUBIO TO HOLD TALKS IN WASHINGTON

Russia oil, \$500-bn target: Energy, security to shape Delhi's response

Shubhajit Roy

New Delhi, February 3

AHEAD OF the meeting early Wednesday between External Affairs Minister S Jaishankar and US Secretary of State Marco Rubio in Washington DC, their first after the announcement of a trade pact between the two countries, two questions are top of mind: How does India navigate the Russian oil import stoppage challenge and meet the USD 500 billion trade target? In both cases, officials say, India's energy security and national security needs will likely shape its responses.

Jaishankar is in Washington DC for a ministerial meeting on critical minerals and is to meet Rubio later.

US President Donald Trump, in his post on Truth Social, said PM Narendra Modi "agreed to stop buying Russian oil" and "to buy much more from the United States and, potentially, Venezuela", and that "this will help



External Affairs Minister S Jaishankar is in Washington DC for a crucial meeting

and the war in Ukraine".

Modi hasn't responded to this assertion by Trump, and the sense in Delhi is the government will not fact-check or contradict the US President like it did when he took credit for brokering a ceasefire between India and Pakistan in May 2025.

Secondly, it is a matter of record there's a downward trend in Russian purchases due to sanctions and market constraints. Delhi has always maintained its oil import decision is guided by

market realities. This has been its position ever since Russia invaded Ukraine in February 2022 and India began buying discounted Russian oil as a matter of economic pragmatism.

That did not go down well with the Europeans, and until recently, the east European and Baltic countries neighbouring Russia had misgivings about Delhi's energy partnership with Moscow. Ukrainian Foreign Minister Dmytro Kuleba had criticised India for its continued purchase of Russian crude oil amid the war with Ukraine.

The US and western Europe had looked the other way because India had maintained the demand-supply equilibrium, and was buying the oil at price caps imposed by the West led by the US under Joe Biden. But that changed under Trump, especially for India.

It's not that Moscow is not aware of the changed realities, and Modi has had several phone conversations and two very

high-visibility meetings in Tianjin and Delhi with Russian President Vladimir Putin. There is a sense that the leaders have had the opportunity to discuss the new realities and challenges that India faced from the Trump administration after it imposed a 25% tariff penalty over Russian oil purchase. India has kept the Russians in the loop.

Russia, on its part, is playing down Trump announcement about India agreeing to stop buying Russian oil. On Tuesday, Kremlin spokesman Dmitry Peskov said, "We haven't heard any statement from New Delhi on this matter yet."

India may not officially confirm stoppage of Russian oil, just as it had never said so publicly about zeroing out Iranian oil or Venezuelan oil under US pressure. The government, sources said, will be guided by its national interests which includes its energy security.

For this, it will possibly buy energy from other sources to

compensate for supply gap. US and Venezuelan oil could be some of the sources — and Trump will view that as a win.

The other challenge of buying American products is purely based on tariffs, and the details are not yet public.

While the basket of commodities and their tariff rates will determine whether the Indian market can absorb American products, the USD 500 billion is the trade target set during Modi's visit to the US in February 2025. The two leaders had launched "Mission 500", aiming to more than double total two-way trade to \$500 billion by 2030. This was almost a vision statement that the two sides agreed to, and won't possibly be achieved with corn and other products that the US administration is talking about. It will likely consist of Delhi buying US defence equipment and aircraft, both civilian and military, depending on India's national security needs and interests.

Opposition MPs question Centre on India-U.S. trade deal in Rajya Sabha

The Hindu Bureau
NEW DELHI

Opposition MPs in the Rajya Sabha on Tuesday asked the Union government to ensure that the India-U.S. trade deal does not impact the lives of Indian farmers.

Speaking on the second day of the discussion in the Upper House on the Motion to Thanks to President Droupadi Murmu for her address to Parliament, Opposition members questioned the government over the announcement of the deal by U.S. President Donald Trump and alleged that the Narendra Modi government succumbed to U.S. pressure.

Congress leader Rajani Ashokrao Patil said it was being pointed out that India would open its agriculture sector to the U.S. "If the government does not protect farmers, if you



Seeking clarity: Congress member Rajani Ashokrao Patil speaks in the Rajya Sabha on Tuesday. ANI

open their agricultural market... Mr. Trump has said that \$500 billion worth of purchases are going to take place... It is essential for Parliament and the nation to know on which aspects the Prime Minister held discussions with Mr. Trump," she said. The Congress MP sought a clarification on Mr. Trump's claim that India would buy oil from the U.S.

and Venezuela from now on instead of Russia. She asked if the Centre had decided to desert the country's long-term ally. Trinamool Congress MP Ritabrata Banerjee said the Union government had succumbed to economic expansionism of the U.S., accepting all terms dictated by Mr. Trump on purchases of oil.

Communist Party of In-

dia (Marxist) leader John Brittas said the government considered the Upper House "inferior to Elon Musk's X platform" as the deal was announced in social media when Parliament was in session.

Abdul Wahab of the Indian Union Muslim League said U.S. President announced the deal first and the country's government responded much later. "I congratulate Mr. Trump for giving us the subsidy, making it 18%. Again like Operation Sindoor he has given a timely address to our government," he said.

Countering the Opposition questions, Shiv Sena leader Milind Deora said India had secured lower tariffs than its major competitors. "The tariff imposed on China is 34%, on Bangladesh 20%, on Vietnam 20%, and on Indonesia 19%. Today, India's tariff is only 18%," he said.

Rupee jumps 1.2% to 90.32 on U.S. tariff cut; markets cheer deal

Ashokamithran T.

MUMBAI

Clarity has emerged in India's equity, currency and precious metal indices after U.S. President Donald Trump announced in a social media post late on Monday that the reciprocal tariff on Indian imports would be reduced to 18%.

The Indian rupee emerged as the best-performing Asian currency on Tuesday, registering a record gain of 117 paise or 1.28% in a single trading session to settle at 90.32 against the U.S. dollar, after India and the U.S. agreed to a trade deal.

In response to the announcement, India's benchmark Nifty50 index increased 2.5%, the most in nine months, to 25,727.55 points on Tuesday.

Ever since the U.S. announced the reciprocal tariffs, Indian markets have been awaiting clarity on the trade deal.

While equity markets swayed, currency traders were losing confidence and the safe haven demand for gold exacerbated over and above the existing global central bank purchases.

The safe haven demand for gold has now subsided as the increase was exacerbated by the uncertainty that came from the tariffs. Though the yellow metal crashed 4.55% to \$4,777 an ounce, it rebounded sharply by 5% to close at about ₹4,950 an ounce.

(With PTI inputs)

Indian, U.S. industry bodies and leaders laud tariff deal

Some, however, cautioned against taking the news of the India-U.S. deal for granted, although the U.S. President's tariff cut announcement was largely welcomed as a positive development

T.C.A. Sharad Raghavan

NEW DELHI

Industry bodies and leaders in both India and the U.S., and across sectors, have welcomed the announcement of a deal between the two countries under which tariffs on India are set to be slashed from the current 50% to 18%.

U.S. President Donald Trump took to social media network 'Truth Social' late on Monday night to announce that he had spoken on the phone to his "greatest friend" Prime Minister Narendra Modi and that they had agreed to a deal to reduce India's tariffs.

While Mr. Trump's post also specified various other commitments made by India, Mr. Modi's post on X regarding the call only confirmed the duty reduction, without either confirming or denying the other aspects.

"The reduction in reciprocal tariffs – from earlier levels of around 50% to 18%, as indicated – would be a major game-changer for the competitiveness of Indian exports vis-à-vis other Asian suppliers," S.C. Ralhan, President of the Federation of Indian Export Organisations (FIEO), said.

Confederation of Indian Industry (CII) President Ravi Memani, too, said that the deal would "enhance the global competitiveness of Indian products while



Deal done: The cut in reciprocal tariffs is expected to be a major game-changer for the competitiveness of Indian exports. REUTERS

catalysing manufacturing growth, employment creation, and the development of resilient supply chains".

The deal was also welcomed by industry bodies in the U.S.

"We are optimistic that this is the first step toward a comprehensive trade agreement that will unlock even more private sector collaboration, and we look forward to reviewing the details of the deal," U.S. Chamber of Commerce President and CEO Suzanne P. Clark said.

The electronics sector, which accounts for a large part of India-U.S. trade, is also expected to experience a "major catalyst" from the deal, according to Ashok Chandak, President of SEMI India and the India Energy Storage Alliance.

Namit Joshi, Chairman of Pharmexcil, said that the U.S. currently accounts for 30-40% of the pharmaceutical industry's total revenue.

competitiveness in both the U.S. and India," Kumar Mangalam Birla, Chairman of the Aditya Birla Group said. He added that the Group was committed to expanding its presence and investments in the U.S.

Sudarshan Venu, Chairman of the TVS Motor Company highlighted the fact that now India has trade deals with key economic partners around the world.

"In a challenging global environment, predictability and openness in trade help Indian industry scale, innovate and create jobs," Mr. Venu said.

Anish Shah, Group CEO & Managing Director of the Mahindra Group said that the reduction in tariffs on Indian exports, along with the commitment to progressively lower tariff and non-tariff barriers, "will boost growth momentum and improve the predictability businesses need to invest with confidence".

Cautionary note

Rahul Ahluwalia, Founder-Director of the Foundation for Economic Development, however, cautions that the deal should not be taken for granted.

"Trump has shown a great deal of unpredictability in following through. Our most urgent task should remain internal reforms that help our regulations and institutions become globally competitive."

"This deal fosters greater market access for Indian generics and biosimilars, strengthening India's position as the global leader in affordable medicines," Mr. Joshi said.

The Gem & Jewellery Export Promotion Council (GJEPC) said that the U.S. tariffs of 50% had "sharply" disrupted trade flows to U.S., which accounted for 31% of the sector's exports in 2024-25.

"This [the tariff cut] is poised to revive demand and stabilise operations," the body added.

Apart from industry bodies, the heads of several Indian companies reacted positively to the deal, saying it would positively impact them.

"The Aditya Birla Group is the largest Indian investor in the U.S., and we see this agreement help shape more resilient supply chains, unlock manufacturing opportunities and drive long-term economic

Opp slams Govt: Why announce US trade deal on X... is Parliament inferior?

Express News Service

New Delhi, February 3

LASHING OUT at the government over announcing the India-US trade deal on X instead of Parliament, CPI-M Rajya Sabha member John Brittas questioned on Tuesday whether the House had become "inferior to Elon Musk's X platform".

During a discussion on the Motion of Thanks on the President's Address, Brittas criticised the government for announcing the deal at 9 pm on social media rather than on the floor of Parliament during an ongoing session. "Is this House more important than Elon Musk's X platform? That's the question."

He said that because of the timing of the announcement, PM Narendra Modi had to be "alert and awake at 11 pm at night to respond to his (US President) teasers", while Cabinet ministers relied on X to "shower compliments on Donald Trump".

"The healthy convention of this country is that any policy decision during a Parlia-

ment session, any important decision, should be announced on the floor of the House, rather than on X platform," he said.

Referring to US claims that India would stop buying oil from Russia, he said, "We were the leader of the non-aligned nation. We never bowed to anybody."

On currency depreciation, he said, "When it was Rs 60 (exchange rate), who said that the rupee was in the ICU, the rupee lost its voice, mute like the PM... If the rupee was in the ICU when it was Rs 60, then at Rs 92 it should be in the mortuary or graveyard."

He also said the last Union Budget revolved around a PM internship programme for which Rs 10,831 crore were allocated, of which only Rs 526 crore or 4% was utilised. "This shows the real picture of your performance. The vast gap between words and deeds is like the Pacific Ocean."

Congress MP Ranjeet Ranjan expressed concerns that farmers are likely to be hit as the trade deal could open markets to US produce while Swaminathan Commission recommendations were yet to be implemented.

Markets soar 2.5% on US deal; FPIs pour in Rs 5.2K cr

Akash Mandal

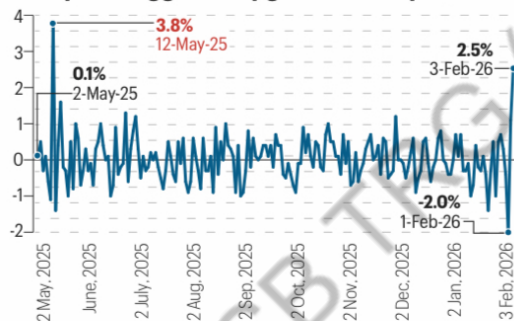
New Delhi, February 3

INDIA'S MARKETS soared 2.5% Tuesday, buoyed by the conclusion of the India-US trade deal that saw tariffs on Indian exports to the US being slashed to 18% from 50%.

The Sensex, which opened as much as 4.5% higher, ended 2.54% higher at 83,739.13 points, while the Nifty50 closed at 25,727.55 points, 2.55% higher from Monday, more than erasing Sunday's steep fall post the Budget announcement of a hike in the Securities Transaction Tax (STT) for futures and options on their way to posting the largest rise in almost nine months.

The rally was broad-based, with almost three-fourth of all stocks that trade on the BSE

• Nifty 50's biggest daily gain since May 12, 2025



% CHANGE IN DAILY CLOSING LEVELS OF NIFTY 50; SOURCE: NSE

and all sectoral indices ending higher. Before Indian markets opened in the morning, American Depositary Receipts (ADRs) of Indian firms listed on US exchanges had surged as investors cheered the late

Monday announcement of a trade deal. The delay in deal has weighed heavily on equity markets, that have also lagged others around the world due to India's low exposure to the ongoing AI-led investment

boom as well as weakening investor confidence amid geopolitical uncertainty.

Net outflows to the tune of nearly \$12 billion from India's equity markets during August 2025-January 2026 had compounded problems for the rupee, which has repeatedly tumbled to fresh all-time lows recently. On Tuesday, it staged a sharp recovery, gaining over 1% against the US dollar to end at 90.27 per dollar — its biggest rise in more than half a decade.

Foreign investors returned to the market, snapping up Indian equities worth Rs 5,236.28 crore (\$580 million), the highest in a little over three months, as per the BSE's provisional data.

"When countries are on good terms there is better flow of capital," said Nilesh Shah, MD, Kotak Mahindra Asset

Management and a part-time member of the Economic Advisory Council to the Prime Minister. "The announcement of the deal will clear the imaginary constraints and it should lead to increased capital flow into the markets, which in turn will not only lift the markets but also strengthen the rupee."

Textile firms shares' were among the biggest gainers on Tuesday, with Gokaldas Exports and Welspun Living hitting the 20% upper circuit. Many of them are major exporters with US market accounting for a big portion of their revenues. India's imports from the US in FY25 amounted to \$46 billion. Its total global imports in the last fiscal year stood at \$721 billion.

FULL REPORT ON
WWW.INDIANEXPRESS.COM

Venezuelan oil will be difficult to process, say Indian refiners

Saptaparno Ghosh

NEW DELHI

Even as U.S. President Donald Trump announced on Monday night that India had agreed to buy more oil from Venezuela, Indian refiners, in the recent past, cited difficulties in refining the oil from the South American nation.

This is primarily due to the fact that Venezuelan crude is comparatively difficult to process, and its properties are not very similar to those of other crude, they said.

Notably, Indian authori-

ties have not yet confirmed or denied Mr. Trump's assertions regarding India's oil purchases.

"Venezuelan crude apart from being bottom-heavy, also has high viscosity and high acid number," State-owned refiner Hindustan Petroleum's Director for Refineries S. Bhattachan said in an analyst call earlier this month.

In other words, the heavy crude oil is thicker, thus, the higher viscosity is indicative of its resistance to flow while the higher acid number indicates the chemical mix existing nat-

urally in the oil.

Speaking to *The Hindu* last week, Sanjay Khanna, CMD of Bharat Petroleum as well as its Director for Refineries explained that the bottom-heavy crude had high metal and nitrogen content.

"It [Venezuelan crude] would have to be co-blended with other lighter crude, up to a 10-15% range and then processed," he explained.

Mr. Khanna further emphasised that procurement from any geography hinges on "techno-commercial" viability and availability.

End in sight

The U.S. trade deal gives hope that the tariffs ordeal may be over soon

News of the India-United States trade deal has brought palpable relief to a lot of Indian industries, but it also comes with persistent and important questions that remain unanswered despite a press statement by India's Commerce Minister Piyush Goyal. The initial announcement, through social media, while true to U.S. President Donald Trump's form, also marks a departure for India and Prime Minister Narendra Modi. Past trade deal announcements have all been made through more formal channels. The announcement of U.S. tariffs on Indian imports being cut to 18% from the existing 50% is certainly welcome. However, as of now, there is no clarity on when this would be implemented. While Mr. Trump said they would be cut "immediately", Mr. Goyal said that the details will be shared "soon". There is also considerable ambiguity over whether this is the first tranche or 'mini-deal' of a larger Bilateral Trade Agreement, a limited deal affecting only tariffs, or something in between. Mr. Trump's assertion that Mr. Modi has "agreed to stop buying Russian oil" must also be addressed by the Indian government sooner rather than later. Mr. Goyal did not touch upon this in his statement. Stopping Russian oil entirely would not only force India to find alternatives for about a third of its oil imports but would also cast a shadow over its relations with Russia, which is a long-time friend and critical supplier of defence equipment. Such a move would announce a very definite realignment for India and, in that light, deserves to be discussed in Parliament first. Similarly, buying more Venezuelan crude comes with its own refining challenges.

There is also the question of what India has committed to the U.S. in terms of tariff concessions, investments and purchase orders. Apart from making the assurance that sensitive agricultural items and dairy would be excluded, the government has been silent despite several significant assertions being made by Mr. Trump and his team. While the "final stages of detailing" are still to be completed, as Mr. Goyal has said, the light at the end of the tunnel has already buoyed Indian stock markets, bolstered the rupee, and brought especial cheer to labour-intensive sectors such as textiles, apparel, footwear, leather and engineering goods that had been hurting from the 50% tariffs. These sectors already stand to gain from the India-European Union trade deal, which Mr. Goyal has assured will come into effect this year. The tariffs they will face in the U.S. will likely still be slightly higher than those enjoyed by competitors in the South-East Asian countries due to their Most-Favoured Nation status. Yet, the new deal stands to certainly enhance their competitiveness, and the targeted announcements in the Union Budget 2026 should also help bridge this narrower gap.

Logjam over Rahul's speech leads to LS face-off; eight MPs suspended

Sandeep Phukan

NEW DELHI

The face-off between the Union government and the Opposition in the Lok Sabha escalated on Tuesday with the suspension of eight Opposition MPs – seven from the Congress and one from the CPI(M) – for the rest of the Budget Session over unruly conduct amid protests over Leader of the Opposition Rahul Gandhi not being allowed to speak on the unpublished memoir of former Army chief General Manoj Naravane (retd).

After the House was adjourned thrice, Parliamentary Affairs Minister Kiren Rijiju, around 3 p.m., moved a resolution seeking suspension of the eight Opposition MPs for showing “disrespect” to the Chair by tearing and throwing paper at it. The resolution was passed by a voice vote. The proceedings were presided over by Dilip Saikia, a BJP MP from Assam.

“The members acted in utter disregard of the House and the authority of the Chair. They tore papers and threw them at the Chair and were named by the Chair for their behaviour,” Mr. Rijiju said while moving the resolution.

The suspended MPs are Gurjeet Singh Aujla, Hibi



Raising voice: Congress leaders Rahul Gandhi, Priyanka Gandhi Vadra and others protest at the Parliament complex on Tuesday. PTI

PM is ‘compromised’, says Rahul after ruckus in LS

Sandeep Phukan

NEW DELHI

After not being allowed to speak on the unpublished memoir of former Army chief General Manoj Naravane (retired) in Parliament, the Leader of the Opposition in the Lok Sabha, Rahul Gandhi, on

Eden, C. Kiran Kumar Reddy, Amarinder Singh Raja Warring, Manickam Tagore, Prashant Padole, and Dean Kuriakose from the Congress and S. Ventakesan from the CPI(M). Led

Tuesday alleged that Prime Minister Narendra Modi was “compromised and under enormous pressure”. He slammed the India-U.S. deal, saying the Centre “surrendered” the interest of farmers.

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by Mr. Gandhi, the Congress members then protested outside the Parliament building against their suspension.

In the evening, Mr. Gandhi wrote to Lok Sabha

Speaker Om Birla, lodging a strong protest against his being disallowed from speaking on a matter of “national security”, calling it a “blot on our democracy”.

He said as an impartial custodian of the House, it is the Speaker’s constitutional and parliamentary responsibility to safeguard the rights of every member, including those of the Opposition.

‘Blot on democracy’

“For the first time in Parliamentary history, on the behest of the government, the Speaker has been forced to prevent the Leader of the Opposition from speaking on the President’s Address. This is a blot on our democracy, against which I record my strongest protest,” Mr. Gandhi said in his letter.

The suspensions could further intensify the logjam between the Treasury benches and the Opposition during the remaining part of the Budget Session, scheduled to end on April 2. Prime Minister Narendra Modi is scheduled to reply in the Lok Sabha to the Motion of Thanks to President Droupadi Murmu for her address to a joint sitting of Parliament.

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Face-off in LS over Rahul Gandhi's speech

Speaker Om Birla held meetings with both government and Opposition MPs to resolve the impasse and did not preside over the proceedings on Tuesday.

The House witnessed high drama over Mr. Gandhi's insistence on speaking about excerpts from General Naravane's unpublished book, cited in a report published by *The Caravan* magazine.

Objecting to Mr. Gandhi's move, Mr. Rijiju said the Speaker had already given a ruling on the matter on Monday, and the Opposition leader should not raise the issue repeatedly. Mr. Gandhi countered that as the Leader of the Opposition, he took objection to the term 'permission' when he had to speak. As the impasse continued, Krishna Prasad Tenneti of Telugu Desam Party (TDP), who was in the Chair, called other members to speak.

When other Opposition MPs did not speak, he called the name of TDP's Harish Balayogi. But as soon as the TDP MP started speaking, Opposition MPs rushed into the well of the House, tore papers and hurled them towards the Chair, prompting Mr. Tenneti to adjourn the House until 3 p.m.

PM is 'compromised', says Rahul amid ruckus

Speaking to presspersons in the Parliament House complex, the former Congress chief said this was the first time in history that the LoP had not been allowed to speak on the Presidential Address.

"The main thing is that our Prime Minister has been compromised," Mr. Gandhi said.

The unpublished memoir reportedly showed the Union government's indecisiveness in dealing with China during the face-off in eastern Ladakh in October 2020.

Criticising the India-U.S. deal, Mr. Gandhi said that the Centre "sold off" the blood and sweat of the farmers to U.S. interests. "The farmers of India must understand that in this trade deal, Narendra Modi ji has sold off your labour and blood and sweat. And that is because he is compromised now. Not just you [farmers], the entire country has been sold. That is why I am not being allowed to speak there [inside the House]," he said.

"Prime Minister Narendra Modi is rattled. And the trade deal that had been stuck for the last four months, for some reason which Prime Minister Modi and I know, was sealed last evening," he said, claiming that Mr. Modi is under pressure from the Epstein files and U.S. case against Gautam Adani.

Why the government has increased capital spending for the defence sector

The government has announced a record ₹78,4678 crore for defence in the FY2026-27 Union Budget, addressing urgent military needs amid geopolitical tensions. The increased funding aims to enhance domestic capabilities and support the Aatmanirbhar Bharat initiative

Anushka Saxena

For years, the Indian defence budget has been caught in a classic "guns versus butter" dilemma, attempting to balance the costs of human-power with the need for technological modernisation. If the figures released in the FY2026-27 Union Budget are any indication, the government seems to be turning the tanker. The FY2027 defence budget, hovering near the substantial ₹8 lakh crore mark, has the potential to meet the demands of a rapidly modernising military force and an expanding domestic defence industry.

The capital outlay

The absolute figures are robust. The total Ministry of Defence (MoD) expenditure has touched a historic high, nearing ₹7,84,678 crore for FY27 (Budget Estimate). This allocation accounts for 14.7% of the Government's total expenditure at the BE stage for FY27. While this percentage is a slight dip from the Revised Estimates (RE) of 14.8% in FY26, it marks a significant stabilisation compared to the lean years of FY21 and FY22, when the defence share had shrunk to nearly 13.2%. If New Delhi can continue to floor defence spending at 14-15% of the central spending pie, it would gradually insulate national security imperatives from the vagaries of fiscal consolidation.

The spectre of ballooning revenue expenditure, specifically salaries and pensions, has haunted defence planners for decades. Because capital outlay is the fund that goes into modernisation and the purchases of big-ticket items such as armour, ships or aircraft, it is expected that revenue and capex components of a defence budget are at parity.

Utilising and diversifying

In the FY27 BE, the share of capital outlay has risen to 27.9% of the total defence budget. This is a remarkable jump from the 24.9% figure for FY23 (Actuals) and the 24.5% figure for FY20 (Actuals). In absolute terms, the capital outlay for FY27 BE stands at a staggering ₹2,19,306 crore.

To put this in perspective, just a year prior, the BE for FY26 had allocated ₹1,80,000 crore for capital expenses. A year-on-year leap of nearly ₹40,000 crore in the capital head is hence significant.

A significant increase

This is the first full Union Budget presented after Operation Sindoor, and the financial footprint of the conflict is likely reflected in the budget for defence. The four-day intense aerial engagement following the Pahalgam terror attack exposed the need for a stockpile of armament

CHART 1: Defence expenditure as a percentage of total government expenditure (in ₹ crore) across select years, and at various Budget stages

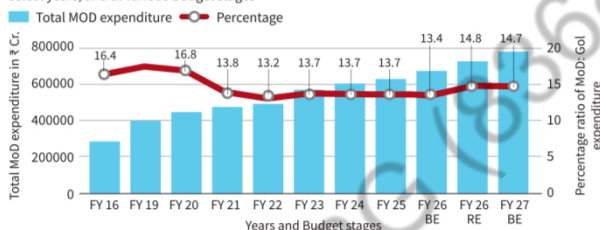
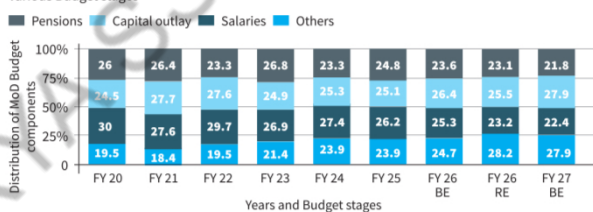


CHART 2: Comparative figures of capital outlay (in ₹ crore) across the past four years, and at various Budget stages

Years/ Stages	FY 23	FY 24	FY 25	FY 26	FY 27
BE (₹ crore)	1,52,369	1,62,600	1,72,000	1,80,000	2,19,306.47
RE (₹ crore)	1,50,000	1,57,228.2	1,59,500	1,86,454.2	-
Actuals (₹ crore)	1,42,940.01	1,54,256.28	1,59,768.4	-	-

CHART 3: Composition of MoD budget/ expenditures in percentage across select years, and at various Budget stages



a departure from previously observed trends wherein the BE is always higher than the RE, and the RE is nearly always higher than the Actuals (see Chart 2).

However, to understand fully the urgency in these figures, one must acknowledge three main aspects of capex utilisation and the geopolitical realities of the past few years.

Firstly, this is the first full Union Budget presented after Operation Sindoor, and the financial footprint of that conflict is likely reflected in the demands for grants. The four-day intense aerial engagement

armament such as precision-guided munitions (PGMs) and loitering munitions, especially if the Indian armed forces are to prepare for a two-front challenge involving both China and Pakistan. In that regard, it is possible that the 21.8% jump in capital outlay is not just for future-proofing, but also for the replenishment of the war wastage reserves depleted in May 2025.

Secondly, the expenditure trends may also signal that Emergency Procurement (EP) – once an adhoc measure after the Galwan incident – has now been

fast-track mechanism used to induct anti-drone systems and long-range vectors during Operation Sindoor could now be the standard operating procedure for critical technologies.

Thirdly, a critical nuance often missed in headline numbers is the concept of committed liabilities. These are payments due in the upcoming FY for contracts signed in previous years. Historically, a major chunk of capex has been absorbed by past obligations, which could include, say, installments for S-400s, Rafales, or Akash missiles signed years ago, leaving less untied cash for new signings. The hope is that the capex hike breaks this cycle, given that for the Government to be able to sign contracts for the procurement of say, Advanced Medium Light Aircraft, or Project 75I diesel-electric submarines, funds worth at least 10-15% of the total contract amount must be free for the agreement to go through in FY27.

Composition statistics

Finally, an assessment of the composition of the total MoD expenditure shows that the share of pensions in the total defence budget has contracted to 21.8% in FY27, down from 26% in FY20. Similarly, the salary component has moderated to 22.4%, a sharp decline from the 30% high seen in FY20.

While the absolute pension bill remains high, its share of the pie is shrinking, likely a preliminary result of the Agnipath scheme and a deliberate policy to cap revenue expenditure. With ₹2.19 lakh crore in the kitty for capital expenditure, the pressure now shifts to the domestic industry. The government has reserved nearly 75% of the capital acquisition budget for the domestic industry under the Aatmanirbhar Bharat initiative.

The challenge, however, remains absorption capacity. Can defence public sector undertakings and private sector players deliver on time? The "Buy Indian-IDDM" (Indigenously Designed, Developed, and Manufactured) route of the Defence Acquisition Procedure is valuable, but recent operational urgencies dictate that delivery timelines cannot be flexible.

The heavy allocation suggests that the government is confident in the maturity of the Indian defence industrial base, and so, business performance, too, should reflect commitment to the act.

Khemchand Singh elected Manipur BJP Legislature Party leader, set to be CM

Vijaita Singh

NEW DELHI

Yumnam Khemchand Singh, 62, was elected Legislature Party Leader of the BJP in Manipur on Tuesday, paving the way for the restoration of an elected government in the strife-hit State. With the election, Mr. Singh is set to become the Chief Minister of the State.

According to sources, Nemcha Kipgen, a Kuki-Zo MLA from Kangpokpi, is likely to be appointed Deputy Chief Minister. She will be the first woman and first Kuki-Zo to hold the post. Another Deputy CM is likely to be from the Naga People's Front, the BJP's alliance partner. The meeting was attended by MLAs from Meitei, Kuki-Zo, and Naga communities.

The Manipur BJP, in a post on X, said, "Heartiest congratulations to Hon'ble Shri @YKhemchandSingh on being elected as the BJP Legislature Party Leader of Manipur. On behalf of BJP Manipur Pradesh, we wish you great success. Your experience, dedication, and leadership will further strengthen the party and serve the aspirations of the people of Manipur."

Mr. Singh posted on X, "I express my sincere grati-



BJP leader Tarun Chugh offering sweets to Y. Khemchand Singh after the Manipur Legislature Party meeting on Tuesday. ANI

tude to the Hon'ble BJP National President @NitinNabin ji, Hon'ble Prime Minister @narendramodiji, Hon'ble Union Home Minister @AmitShah ji, & all the respected MLAs of @BJP4Manipur for their trust in me by electing me as the Leader of the BJP Legislature."

Manipur was placed under President's Rule on February 13, 2025, and the Assembly was placed under suspended animation. The tenure of the Assembly ends in February 2027.

'Acceptable choice'

Mr. Singh, MLA from Singjamei, former Speaker of the State Assembly, and a Taekwondo player, is said to be an acceptable choice for the Chief Minister's post among Kuki-Zo MLAs and has the backing of the Rashtriya Swayamsevak

Sangh (RSS), sources said.

Tarun Chugh, the BJP's central observer for the election of Legislature Party leader, told *The Hindu* that his name was proposed by former Chief Minister N. Biren Singh, and on Wednesday, they would meet Governor Ajay Kumar Bhalla to stake claim to form the government.

On December 8, in a first such attempt, Mr. Singh, who belongs to the majority Meitei community, visited two Kuki-Zo villages in the two Naga-dominated districts of Ukhrul and Kamjong. He also met the Kuki-Zo people living at a nearby relief camp, who were displaced during the May 2023 ethnic violence.

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DISSOLVE HOUSE: CONG.

» PAGE 12

Khemchand Singh set to be Manipur CM

There are 37 BJP MLAs, including seven Kuki-Zo legislators, in the 60-member Assembly. Five Kuki-Zo MLAs attended Tuesday's meeting. In all, there are 10 Kuki-Zo MLAs in the Assembly.

Six MLAs in the Assembly are from the National People's Party (NPP) and five from the Naga People's Front.

Not all are on board

Though the Tuesday's meeting was attended by five Kuki-Zo MLAs, not all of them were on board.

Paolienlal Haokip, BJP MLA from Saikot who belongs to the Kuki-Zo community, told *The Hindu* that he met party leaders and told them that till there was an assurance on a political solution for the community, he would not join the government.

Over the past three days, the BJP central leadership asked all its Manipur legislators and alliance partners to be present in New Delhi for a crucial meeting. Wilubou Newmai, a BJP leader from Manipur, said, "A lot of back-channel efforts went in to bring all the communities together."

Will support any motion by Opposition to impeach CEC Gyanesh Kumar: Mamata

The Hindu Bureau

NEW DELHI

West Bengal Chief Minister and Trinamool Congress chairperson Mamata Banerjee on Tuesday indicated that her party will be amenable to an impeachment motion against Chief Election Commissioner Gyanesh Kumar if a united Opposition moves such a motion.

The Chief Minister, however, noted that the Opposition does not have the numbers necessary to force the motion through in Parliament. "But it will be good to have it on record," she said. Ms. Banerjee, along with party national general secretary and Lok Sabha party leader Abhishek Banerjee, addressed a press conference in Delhi.

The two leaders were



Mamata Banerjee addresses the media outside the EC office in New Delhi on Tuesday.

surrounded by many "SIR-affected" families from West Bengal. These families, who accompanied Ms. Banerjee to Delhi, include those who have either their names deleted from the electoral roll after being declared dead by the Election Commission and relatives of Booth Level Officers (BLOs) who died dur-

ing the special intensive revision (SIR) exercise. A Trinamool delegation led by Ms. Banerjee met the Election Commission on Monday.

The CEC can be removed from office through the process of impeachment, requiring a two-thirds majority of the Lok Sabha and the Rajya Sabha present and voting for the same.

Ms. Banerjee said that the BJP defended SIR claiming that it would remove "*ghuspetiya*" or infiltrators from the electoral rolls, but so far, it had not been able to produce any evidence to back the claim. She further said that the exercise seemed to have targeted minorities. In West Bengal, 33% of the population are minorities. She asked, "Will you delete all of them?"

Stop sharing user data or opt out of country: SC to WhatsApp, Meta

Ananthakrishnan G
New Delhi, February 3

THE SUPREME COURT Tuesday sharply criticised WhatsApp LLC and Meta Platforms over their data-sharing practices, observing that they were making a “mockery” of India’s “constitutionalism” and telling them to “opt out of the country” if they could not address concerns around privacy and consent.

A three-judge Bench led by Chief Justice of India Surya Kant, and comprising Justices Joymalya Bagchi and Vipul M Pancholi, was hearing appeals filed by Meta and WhatsApp against a judgment of the National Company Law Appellate Tribunal (NCLAT) that upheld a penalty of Rs 213.14 crore imposed by the Competition Commission of India (CCI) over WhatsApp’s 2021 privacy policy.

The CCI has also challenged the NCLAT order to the extent that it permits Meta and WhatsApp to share user data for advertising purposes.

“We will not allow you to share even a single (piece of) information. You cannot play with the rights of this country. Let a clear message go on your WhatsApp,” the CJI said. The Bench will hear the matter again on

February 9 to decide whether interim restrictions on data sharing are required pending final adjudication.

At the outset, senior advocates Mukul Rohatgi and Akhil Sibal, appearing for Meta and WhatsApp, respectively, informed the court that the penalty amount had been deposited. The Bench directed that the amount should not be withdrawn until further orders.

Expressing serious reservations about data-sharing, the CJI questioned the nature of user consent. “What is the choice with the customer? Because you have now a complete monopoly in the market and you will say, I am giving a choice. The choice is like the agreement between lion and lamb, that either you walk out of WhatsApp facility or we share your data. Why should we allow?” he asked.

The CJI said the court would pass directions unless the companies undertook not to share data until the matter was finally decided. “The choice is very simple. Will you give an undertaking or we are issuing directions... Or we dismiss it right now. You have made mockery of the constitutionalism of this country,” he said.

Sibal submitted that the

Rs 213.14 cr

Is the amount of penalty imposed by the CCI, and upheld by NCLAT, over WhatsApp’s 2021 privacy policy. The SC was hearing appeals filed by Meta and WhatsApp against this judgment



NCLAT judgment had set aside the ban on data sharing and that the December 15, 2025 order permitted sharing with user consent. The CJI responded: “We will not allow you to share a single word of your data. It must be very clear. If you are willing to give an affidavit undertaking of your management, then it’s fine. Otherwise, we will dismiss it. No question of sharing data. How can you play with the right to privacy of people like this?”

He further observed: “You have been bought by Facebook. Tomorrow someone else will buy and he will transfer the entire data.”

Sibal maintained that data sharing occurred only with user consent and that an opt-out option existed. The CJI remarked:

“What do you mean by opt out? Then opt out is, you opt out of the country. You withdraw your facilities from here.” Solicitor General Tushar Mehta, appearing before the court, said: “Our privacy data, our personal data is not only sold, it is commercially exploited. We feel we are consumers, (but) we are products.” The Bench agreed that private data was being used for commercial gain.

The CJI questioned how a poor street vendor would understand the implications of the terms and conditions. “The kind of language you use, very cleverly crafted language, even some of us will not understand that language,” he said.

The CJI said such conditions must be examined from the perspective of a common consumer. “How many people will understand the implication of the conditions which you impose? Where is the question of opt out? Because people do not understand that complication,” he said.

Asking counsel to demonstrate how the opt-out mechanism worked, the CJI said: “Please

show in your mobile or my mobile how this opt out business operates. Nobody will be able to understand it. And by now we do not know how (many) millions of data you must have (shared). This amounts to, in a way, a decent way of committing theft of private information.”

Justice Bagchi observed: “We are examining a player who is held to be a dominant player in the field imposing conditions which appear to be blatantly unfavourable to the user.”

On the argument that users could opt out, Justice Bagchi asked how users would even be aware of such an option or be in a position to make a realistic decision. Rohatgi submitted that the SC had earlier declined to stay data sharing and had directed that newspaper advertisements be published about the policy in multiple languages, which had been complied with.

Justice Bagchi responded: “You say that you put up some newspaper advertisements. Who reads? This platform every alternate day would send messages when it comes to questions of sharing. When it comes to information to opt out, it would be in a newspaper. And how many do you expect will read that disclosure?”

What is happening in Balochistan?

NEWS ANALYSIS

Stanly Johny

On January 30-31, the Balochistan Liberation Army (BLA) carried out coordinated attacks across at least nine districts of Balochistan, targeting police stations, military outposts and a high-security prison in Quetta, the provincial capital. In a video released online, BLA leader Bashir Zeb Baloch claimed responsibility for the attacks, describing them as the second phase of the 'Herof' (Black Storm) operation. He called on Baloch men and women to leave their homes and join the "national liberation war" against the Pakistani military. The BLA claimed it killed 84 security personnel and kidnapped 18 others.

According to Pakistani authorities, the military launched operations against the militants across the province, killing at least 145 fighters. Soon after the attacks, Pakistan's Interior Minister Mohsin Naqvi accused India of supporting "terrorists". "India is behind these attacks. I can tell you for sure that India planned these attacks along with these terrorists," Mr. Naqvi said, without offering any evidence. On February 1, India "categorically rejected" Pakistan's "baseless allegations", calling them "usual tactics to deflect attention from its own internal failings," according to a statement issued by the Ministry of External Affairs.

Rich in minerals

Balochistan, a long-standing flashpoint Pakistan, has witnessed a surge in violence in recent years, particularly after the Taliban, which was backed by the Pakistani military esta-



Burnt vehicles inside a torched police station on the outskirts of Quetta on Sunday, after an attack by Baloch separatists. AFP

blishment, captured power in Kabul in August 2021. According to the Pakistan Institute for Peace Studies, Balochistan recorded at least 254 attacks in 2025, resulting in more than 400 deaths, a 26% rise from the previous year.

Balochistan, Pakistan's largest province, covers nearly 40% of the country's land area. Rich in mineral resources, it shares borders with Iran and Afghanistan, has an Arabian Sea coastline, and is home to nearly 15 million of Pakistan's 240 million people. Most of the country's mineral wealth – copper, scandium, lead, zinc, chromite, marble, granite and molybdenum – is concentrated in Balochistan, which also holds significant reserves of oil, gas, coal and gold.

The \$60-billion China-Pakistan Economic Corridor, linking China's Xinjiang region to Pakistan's Gwadar port through roads, railways and pipelines, passes through Balochistan. In September 2025, US Strategic Metals, a Missouri-based mining firm, signed a \$500m memorandum of understanding with Pakistan's Frontier Works Organisation, a military-aligned company, to extract minerals in Pakistan. But recurring violence in Balochistan continues to threaten

the viability of large, long-term investments in the province.

Waves of rebellion

Balochistan has witnessed several waves of rebellion since its annexation by the Pakistani state in 1948. The latest phase began in the early 2000s after the emergence of the BLA. Human rights organisations have accused Pakistan of using excessive force against Baloch nationalists and militants. Amnesty International reports that over 10,000 Balochis have disappeared in Pakistan since 2011.

Enforced disappearances, extrajudicial killings, and military operations have deepened resentment among the Baloch population. Local leaders argue that the Pakistani government is exploiting the province's resources without addressing the development needs of the local population. Long-standing historical, political and economic grievances have fuelled the separatist movement. Following the Taliban takeover of Kabul, as security conditions deteriorated in Pakistan's border regions with the Pakistani Taliban stepping up attacks in the tribal areas, Baloch separatist groups also intensified their operations.

In March 2025, the BLA

carried out one of their most daunting attacks when they hijacked the Jaffar Khan Express with more than 400 passengers onboard. Pakistani security forces launched Operation Green Bolan, rescuing more than 300 passengers and killing at least 33 fighters, according to an official account. March also witnessed largescale protests, called by the Baloch Yakejethi Committee, a Baloch rights movement, which was violently put down by state forces.

Cycle of violence

But despite Pakistan's resort to heavy force, Baloch militants have expanded their attacks in recent years. Since 2018, major factions, including the BLA and the Balochistan Liberation Front (BLF), have coordinated under the banner of the Baloch Raaji Aajoi Sangar, a united front that calls for a sovereign Balochistan. Militants have increasingly deployed suicide bombers (including women), carried out coordinated attacks and temporarily seized territory and key highways, directly challenging state authority.

The Pakistani state often responds with retaliatory force, but without breaking the cycle of violence. Islamabad has frequently blamed India for the Baloch insurgency. Following the Jaffar Khan express attack, Pakistan formally designated Baloch militant groups as 'Fitna al-Hindustan'. India has consistently rejected any involvement. "Instead of parroting frivolous claims each time there is a violent incident, [Pakistan] would do better to focus on addressing long-standing demands of its people in the region," India said on February 1. "Its record of suppression, brutality and violation of human rights is well known."

WASHINGTON

'U.S. shoots down Iranian drone that approached aircraft carrier'



AFP

U.S. Central Command said on Tuesday that a U.S. Navy fighter jet shot down an Iranian drone that was "aggressively approaching" the aircraft carrier *USS Abraham Lincoln* with "unclear intent" in the Arabian Sea. The Shahed-139 drone was shot down by an F-35C fighter jet from the *Lincoln*. AP

YANGON

Myanmar, Russia sign new military cooperation pact, lasting till 2030



AFP

Myanmar and Russia have signed a five-year military cooperation pact, Moscow said on Tuesday, sealing an alliance analysts say has been crucial to the junta's grip on power. Russia's Defence Ministry announced the new pact lasting until 2030 after a Monday visit to Myanmar by Sergei Shoigu. AFP

U.S. YET TO CONFIRM IF TALKS WILL TAKE PLACE AT ALL

Iran president now seeks 'fair, equitable negotiations' with US

Associated Press
Dubai, February 3

IRAN'S PRESIDENT said Tuesday he instructed the country's foreign minister to "pursue fair and equitable negotiations" with the United States, the first clear sign from Tehran it wants to try to negotiate as tensions remain high with Washington after the Mideast country's bloody crackdown on nationwide protests last month.

The announcement marked a major turn for reformist President Masoud Pezeshkian, who broadly had warned Iranians for weeks that the turmoil in his country had gone beyond his control. It also signals that the president received support from Iran's Supreme Leader Ayatollah Ali Khamenei for talks that the 86-year-old cleric previously had dismissed.

Turkey had been working behind the scenes to make the talks happen there later this week as US Mideast envoy Steve Witkoff is traveling in the region.

But whether Iran and the US can reach an agreement remains to be seen, particularly as President Donald Trump now has included Iran's nuclear program in a list of demands from Tehran in any talks. Trump ordered the bombing of three Iranian nuclear sites during the 12-day war Israel launched against Iran in June.



Masoud Pezeshkian, the President of Iran, attends the United Nations General Assembly at United Nations headquarters on September 25, 2025. AP

“I have instructed my Minister of Foreign Affairs to pursue fair and equitable negotiations, guided by the principles of dignity, prudence, and expediency.”

MASOUD PEZESHKIAN,
PRESIDENT OF IRAN.

Writing on X, Pezeshkian said in English and Farsi that the decision came after “requests from friendly governments in

the region to respond to the proposal by the President of the United States for negotiations.”

“I have instructed my Minister of Foreign Affairs, provided that a suitable environment exists - one free from threats and unreasonable expectations - to pursue fair and equitable negotiations, guided by the principles of dignity, prudence, and expediency,” he said.

The US has yet to acknowledge the talks will take place. A semi-official news agency in Iran on Monday reported that Pezeshkian had issued such an order to Foreign Minister Abbas Araghchi, who held multiple rounds of talks with Witkoff before the 12-day war.

Pak invited to join Iran-US talks: Govt

Pakistan on Tuesday said it has been invited to participate in the Iran-US talks aiming to reduce tension by arranging a deal between the two estranged nations. The talks are expected to take place at a neutral venue, possibly in Türkiye, and officials of regional countries will participate to give it a broader perspective for peace.

Foreign Office (FO) spokesperson Tahir Andrabi confirmed that Islamabad has been invited. “Pakistan has received the invitation for the upcoming talks between Iran and the United States,” Andrabi said in response to a media query.

US shoots down Iranian drone that approached its aircraft carrier

Associated Press
Washington, February 3

US CENTRAL Command says a US Navy fighter jet shot down an Iranian drone that was approaching the aircraft carrier USS Abraham Lincoln in the Arabian Sea.

In an emailed statement Tuesday, US Central Command said the drone “aggressively approached” the aircraft carrier with “unclear intent” and it “continued to fly toward the ship despite de-escalatory measures taken by US forces operating in international waters.”

The US military said that the shootdown also occurred within hours of another incident in which Iranian forces harassed a US-flagged and US crewed merchant vessel that was sailing in the Strait of Hormuz.

The Shahed-139 drone was shot down by an F-35C fighter jet from the Lincoln, which, according to US Central Command, was sailing about 800 kilometers from Iran's southern coast, said the military.

SC has not upheld death penalty in 3 years: report

The top court acquitted 10 death row prisoners in 2025; lower courts handed down 1,310 death sentences over the past decade; high rate of acquittals raises concerns about wrongful convictions

Ishita Mishra
NEW DELHI

The Supreme Court has not confirmed a single death penalty in the past three years, according to an annual statistics report on death penalties in India, published by the Square Circle Clinic, a criminal justice initiative at the NALSAR University of Law, Hyderabad.

In fact, in 2025, the top court acquitted 10 prisoners who had been on death row, the highest number of such acquittals in the past decade.

The report, which examined death penalty trends across India over the past 10 years, found that the sessions courts handed down 1,310 death sentences nationwide between 2016 and 2025.

"Despite growing judicial scepticism at higher levels," the lower courts sentenced 128 individuals to death in 2025 alone, the report said.

High rate of acquittals

Of the 1,310 death sentences, 842 verdicts were handed down by the High Courts, of which 70 – that

Capital punishment

Examining death penalty trends in India (2016-2025)

1,310

death sentences by Sessions Courts

128 sentenced in 2025

842

death sentences were heard by the High Courts

70 confirmed (8.31%),
285 acquitted,
411 commuted

0 death sentences confirmed by the Supreme Court in the past 3 years

Of 37 HC-confirmed cases decided by SC:

15

acquitted

14

commuted

574

prisoners on death row (Dec. 31, 2025) – highest since 2016

is, just 8.31% – were confirmed. The High Courts acquitted 285 people on death row, while 411 death sentences were commuted.

The Supreme Court's stance has been even more restrictive, with no death sentence confirmed in the past three years.

Also, in cases where sessions courts imposed death sentences which were confirmed by the High Courts, not a single sentence has yet been affirmed by the Supreme Court.

Of the 37 such death sentences which have been decided by the Supreme Court, 15 resulted in acquittal

and 14 were commuted. "What is starkly clear from these figures is that errors at Sessions Courts are not only leading to wrongful imposition of death sentence but are also resulting in wrongful convictions. The high rate of acquittals by the appellate judiciary requires a serious examination of how Sessions Courts deem a case worthy of even a conviction," the report said.

The report also showed that India had 574 prisoners – 550 men and 24 women – on death row as of December 31, 2025. The average time spent on death

row before acquittal was over five years, with some prisoners languishing for nearly a decade before being exonerated.

However, 138 individuals were also removed from death row during the year through acquittals, commutations, or remand orders

One of the report's most alarming findings concerns procedural violations at the sentencing stage.

Despite clear guidelines laid down by the Supreme Court in *Manoj vs State of Madhya Pradesh*, which mandate psychological evaluations, prison conduct reports, and mitigation hearings – which were elevated to a fair trial right requirement in *Vasanta Sampat Dupare vs Union of India* – in 2025, nearly 95% of death sentences in 2025 were imposed without compliance.

Sentencing hearings were frequently conducted within days of conviction, leaving little scope for meaningful defence representation, the report said.

Another emerging trend is the growing use of life imprisonment without remission as an alternative to the death penalty.