

Centre moots inter-State redistribution of Lok Sabha seats based on 2011 Census

Govt. circulates drafts of Constitution Amendment Bill and Delimitation Bill

If proposals are accepted, share of Lok Sabha seats of southern States will shrink

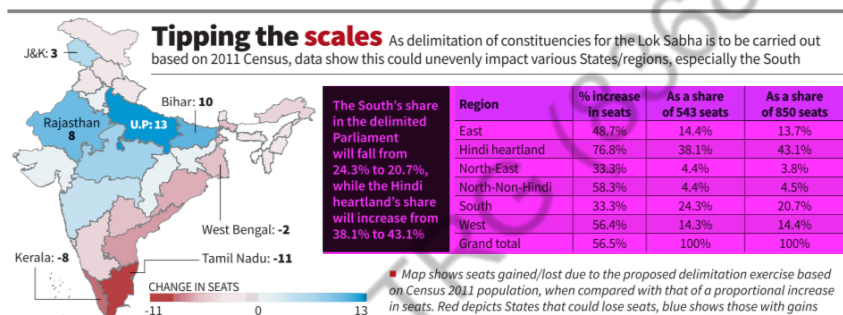
The Bills propose to raise strength of Lok Sabha to a maximum of 850 seats

Varghese K. George
Sobhana K. Nair
NEW DELHI

States that have stabilised their populations could see their share of representation in Parliament shrinking if proposals in the drafts of a Constitution Amendment Bill and a Delimitation Bill circulated by the Centre become law.

The Budget Session is reconvening on Thursday to consider the Constitution (131st) Amendment Bill, which the government says are aimed at expediting the implementation of 33% reservation for women in the Lok Sabha and the State Assemblies.

The Congress said the government was using women's reservation as a facade to railroad inter-State redistribution of Lok Sabha seats without consultation, and ahead of the 2029 general election. "We will oppose this backdoor delimitation. We are 100% for women's reservation and demand its immediate implementation within the existing strength of the Lok Sabha and Assemblies," Congress MP Abhishek Manu Singhvi said. "In the



Stalin warns of massive protest

T.N. Chief Minister M.K. Stalin warned of a massive protest that would bring the State to a standstill if the Centre decided on delimitation affecting southern States and offering more political power to northern States.



proposals there is not a whisper of the repeated assurance by the government that the inter-State seat distribution percentages will remain intact." The proposals emphatically seek to change the

Build consensus, Revanth tells PM

Telangana Chief Minister A. Revanth Reddy wrote to Prime Minister Narendra Modi, calling for a national consensus on the proposed rise in seats and urging immediate implementation of women's reservation without linking it to seat expansion.



seat distribution – indeed, that is stated in the objects and reasons of the Constitutional Amendment Bill itself. The statement notes that "while the freeze of seats on the basis of population figures of the 1971

Dangerous shift: Siddaramaiah

Karnataka Chief Minister Siddaramaiah opposed the proposal, saying, "If numerical strength begins to determine power, the need for broad-based support across the country will diminish. That is a dangerous shift."



Census served an important policy purpose, the country's demographic profile has since undergone substantial changes, as reflected in the population figures of the latest published census, including

Attempt to divide India: Mamata

West Bengal Chief Minister Mamata Banerjee on Tuesday said the BJP-led Union govt. has tabled the Delimitation Bill to divide West Bengal and India at large. They are doing it to gain political mileage, she said.



significant inter-State and intra-State population shifts." The draft Delimitation Bill mandates that "it shall be the duty of the Commission to readjust, on the basis of the latest census figures, the alloca-

tion of seats in the House of the People to the States."

If these proposals are enacted, the Hindi heartland States will see their share of Lok Sabha seats rise from 38.1% to 43.1%, while the southern States will see theirs shrink from 24.3% to 20.7%.

In combination, the Bills propose an inter-State redistribution of Lok Sabha seats based on the latest Census figures and an increase in the size of the Lok Sabha to a maximum of 850 seats – 815 for States and 35 for Union Territories – against the current ceiling of 550, while carving out 33% for women.

Under the existing constitutional scheme, Lok Sabha seats are distributed between States on the basis of the 1971 Census and within each State on the basis of the 2001 Census. Article 82 provides that this arrangement will continue "until the relevant figures for the first census taken after the year 2026 have been published".

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Govt. seeks delimitation based on 2011 Census

The proposed amendment removes this provision altogether. “The Bills being introduced in the name of implementing women’s reservation amount to a death warrant for federal India,” said John Brittas, CPI(M) MP.

The freeze on the readjustment of Lok Sabha seats written into Articles 81 and 82 was based on a political consensus negotiated by BJP Prime Minister Atal Bihari Vajpayee in 2001 and enacted through a constitutional amendment. The Narendra Modi government is now proposing to remove that safeguard and effect an immediate redistribution of Lok Sabha seats based on the latest Census – which, as of now, is that of 2011.

The States of Tamil Nadu, Kerala, Karnataka, Telangana, and Punjab had demanding an extension of the existing freeze for another 25 years beyond 2026. Not only has that demand been overlooked, the Centre is seeking parliamentary approval for an immediate redrawing of India’s representative map.

Nothing to do with women’s quota

“Barely 36 hours before Parliament reconvenes, without any multi-party meetings despite repeated demands, and with no attempt to refer these Bills to a parliamentary committee, the government is trying to unilaterally enforce its wishes on the country. This has nothing to do with women’s reservation and everything to do with delimitation for BJP’s 2029 election plans,” Mr. Singhvi said.

While all large States will receive some additional seats in the Lok Sabha, assuming all 815 permitted seats are allocated, some will see their strength rise dramatically. Uttar Pradesh will gain 58 seats over its current 80, while Kerala will gain only three, taking it from 20 to 23, if 815 seats are distributed according to the 2011 population distribution.

U.P.’s share of the Lok Sabha will rise from 14.73% to 16.24%, while Kerala’s will shrink from 3.68% to 2.7%. Bihar will move from 40 seats (7.37%) to 72 seats (8.47%); Maharashtra from 48 to 78; and Tamil Nadu from 39 to 50 – a reduction in its current share from 7.18% to 5.88%.

Constitution Amendment Bill moots possible change in size of State Assemblies

Sandeep Phukan

NEW DELHI

The Constitution (One Hundred and Thirty-First Amendment) Bill, 2026 proposes significant changes to the size and composition of the Assemblies by restarting the process of delimitation and removing the long-standing constitutional freeze, in effect since 1976, on readjustment of seats based on population.

The Bill will be introduced in the Special Session of Parliament commencing on Thursday.

The proposed amendments, in effect, mean that Assemblies will see a change in their total number of seats depending on population changes, and constituency boundaries within States will also be redrawn as part of the delimitation exercise, the Constitution (Amendment) Bill said.

The Bill seeks to amend the provisions in Article 170, which governs the composition of the Assemblies, to enable a fresh readjustment of the number of Assembly seats and the redrawing of territorial constituencies on the basis of a future Census to be



The Bill will be introduced in a Special Session of Parliament commencing on Thursday.

specified by Parliament.

In doing so, it removes the existing freeze that has prevented such readjustments since 1976. The Bill proposes to delete the third proviso of Article 170 that had postponed the delimitation exercise until after the first Census which will be conducted in 2026.

The amendment also replaces the earlier formulation that allowed Parliament to determine the authority for delimitation with a provision explicitly assigning the task to a Delimitation Commission.

It further revises the explanation to Article 170(2) so that “population” for the purpose of seat allocation will mean the popula-

tion ascertained in the Census that Parliament decides to adopt.

The Bill substitutes Article 334A to operationalise the one-third reservation for women in the Assemblies. The provision states that the reservation will come into effect only after a fresh delimitation exercise is carried out on the basis of the latest published Census. As of now, the latest published Census is 2011.

Tribal representation

The Bill provides for safeguards to ensure the delimitation exercise does not dilute tribal representation in certain Northeastern States.

The delimitation process itself will be governed by the proposed Delimitation Bill, 2026, which provides for the constitution of a Delimitation Commission by the Centre.

The commission will be chaired by a former or sitting Supreme Court judge and will include the Chief Election Commissioner, or an Election Commissioner nominated by the Election Commission, and the State Election Commissioner of the concerned State.

Nitish resigns; Samrat to become Bihar CM

Amarnath Tewary

PATNA

Bihar Deputy Chief Minister Samrat Choudhary is set to become the State's first BJP Chief Minister after he was elected leader of the Bharatiya Janata Party and NDA legislature parties on Tuesday.

He met Governor Syed Ata Hasnain to stake his claim to form the new government in the State and is likely to take oath at the Raj Bhavan on Wednesday along with a few select

leaders, including two Deputy Chief Ministers from the Janata Dal (United).

Mr. Choudhary's election followed days of suspense and speculation, and came an hour after Nitish Kumar officially resigned as Bihar's longest serving Chief Minister.

Mr. Kumar, leader of the JD(U), became a Rajya Sabha member last week. In a post on X, he listed his government's achievements.

DEVELOPMENT PLAN

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Efforts under way for second set of U.S.-Iran talks as fragile truce holds

First talks were part of an ongoing diplomatic process rather than a one-off effort, say Pak. officials; second round is likely to be held this week; *Rich Starry*, a tanker owned by a Chinese company and sanctioned by U.S., crosses the Strait of Hormuz

Associated Press

ISLAMABAD

The standoff between the United States and Iran deepened on Tuesday as the U.S. declared it had blockaded Iran's ports, Tehran threatened to strike targets across the region, and Pakistan said it was racing to bring the sides together for more talks.

Though last week's ceasefire appeared to hold, the showdown over the Strait of Hormuz risked reigniting hostilities and deepening the regional war's economic fallout.

Talks aimed at permanently ending the conflict – which began February 28 with U.S. and Israeli strikes on Iran – failed to



Hopeful sequel: A security guard stands atop the Serena Hotel, the venue where Iran and U.S. held peace talks earlier in Islamabad. AFP

produce an agreement last weekend, though Pakistan has proposed hosting a second round in the coming days.

Two Pakistani officials said the first talks were part of an ongoing diplomatic process rather than a one-off effort.

the U.S. officials. The location, timing and composition of the delegations had not been decided, although Islamabad and Geneva are being considered as host cities.

The blockade is intended to pressure Iran, which has exported millions of barrels of oil, mostly to Asia, since the war began. The blockade of Iranian ports involves more than 10,000 military personnel, more than a dozen warships and dozens of aircraft, U.S. Central Command said.

At least three ships sailing from Iranian ports crossed the Hormuz Strait despite the blockade, but some vessels taking the route later turned back, maritime tracking data indicated. They were among

at least seven Iran-linked vessels that passed through the strait after the blockade came into effect, according to maritime data provider Kpler.

A Chinese tanker, the *Rich Starry*, also crossed the strait overnight from Monday to Tuesday via the Iranian-approved vetting route south of Larak Island. Kpler said that vessel was carrying 31,500 tonnes of methanol and was bound for Sohar in Oman, according to data from its transponder. It turned around while in the Gulf of Oman on Tuesday and headed back up towards the strait.

The *Rich Starry* is listed by the United States' Office of Foreign Assets Control as being sanctioned for ties to Iran.

For US and Iran, there are three crucial issues — all can be resolved

WHILE THE Iran-US talks in Islamabad failed, a deal was and is in plain sight. That the Iranians and Americans sent high-level delegations suggests that the two sides had already made substantial progress towards a deal. Both were in search of clinching commitments from the other but failed to get them. The meeting was not necessarily a waste of time, though, and we should not easily conclude that Tehran and Washington were insincere. There are times when real differences exist, and bridging those differences can be a genuine challenge.

In the aftermath of the Islamabad talks, US President Donald Trump has initiated a blockade of the Strait of Hormuz and promised to resume air attacks on Iran. Those and other actions could jeopardise the prospects of a peace deal, but they may also strengthen the imperatives for a deal.

What is the deal that was in plain sight and that could yet eventuate?

Going into the Islamabad meeting, three issues were crucial: Iran's highly enriched uranium (HEU) and its nuclear future; the reopening of the Strait of Hormuz; and Israel's war in Lebanon.

Iran has about 400 kg of HEU enriched to a 60 per cent level. Enriched further to the right level, this could be enough for 10-12 nuclear bombs. There are only three ways that the HEU can be removed from Iran — by conquering the country or by regime change; by a military raid; or by Iranian cooperation. If we rule out conquest or regime

change, neither of which looks anywhere near possible, the only realistic options are an extraction raid or Iran handing the HEU over to the US.

There is a view that the US's combat search and rescue (CSAR) mission on April 3 to bring home its downed airman was also an attempt at removing Iran's HEU. This is almost certainly wrong. The US armed contingent reportedly consisted of 200 special forces personnel, a number that is too small to have located and removed up to 400 kilograms of HEU in a hostile environment, especially if the HEU is dispersed to various sites.

What is plausible is that in addition to the CSAR mission, the Americans attempted a military probe to assess whether an HEU raid is feasible. In the event, US forces came under heavy fire, lost two C-130 transport aircraft, and four helicopters. A real HEU raid would be much larger, more visible, and more targetable than the April 3 operation. If so, its chances of success, against Iranian forces ready and waiting, including at heavily protected nuclear sites, are low.

If the HEU cannot be extracted, Iran must hand it over. Under the 2015 Joint Comprehensive Plan of Action (JCPOA) between Iran, the US, and others, the HEU problem was to have been dealt with in several ways. But the JCPOA is anathema to Trump and the Republican Party, and any resurrection of it seems politically impossible.



KANTI BAJPAI

Iran's militarisation of the strait is aimed at exercising strategic leverage and at generating funds to rebuild damaged infrastructure. With a peace deal, the need for leverage would disappear

The only option, then, is for Iran to hand over the HEU — but for a price. That price is the lifting of all US nuclear sanctions. To sweeten the deal further, the US could help rebuild Iran's electricity-generation capabilities.

Removing the HEU is only part of a deal to ensure that Iran does not go nuclear. The other part, Trump has insisted, is for Tehran to convincingly renounce nuclear weapons capability by committing not to enrich uranium beyond 3.67 per cent — the US reportedly wants a 20-year commitment, Iran a five-year commitment.

Leaving aside the time-period issue, convincingly renouncing nuclear weapons is only possible either through regime change or the current regime's acceptance of full-scope safeguards under the IAEA (or some other arrangement).

Since regime change is unlikely, full-scope safeguards or more limited, critical safeguards are the way to go. Washington has little faith in the IAEA and other inspectors in this regard. Iran-US joint inspections would then seem to be the only possibility. If Iran can hand over its HEU to the US for a price, can it not also accept joint bilateral inspections?

The second key part of the Iran-US talks was about Hormuz. Here too there was daylight. Prior to the talks in Islamabad, Trump had suggested that the US could join Iran in a joint venture to enable safe passage of maritime traf-

fic and to share revenue from a toll.

India and others have opposed a toll on shipping. A toll would contravene international law and set a dangerous precedent. Littoral countries elsewhere could come into conflict, as they each separately charge a toll. For shippers, and perhaps insurers as well, toll charges would be disastrous, financially and procedurally.

There is still room to resolve the Hormuz problem. Iran's militarisation of the strait is aimed at exercising strategic leverage and at generating funds to rebuild damaged infrastructure. With a peace deal, the need for leverage would disappear. As for the funding of Iran's infrastructure, the US could help by lifting all non-nuclear sanctions and by releasing frozen Iranian assets (in partnership with other who have sanctioned Iran).

Finally, ending Israel's war in Lebanon may be achievable. On April 9, Prime Minister Benjamin Netanyahu offered peace talks with Hezbollah aimed at the militia's disarmament. While Hezbollah rejected the offer of talks, Iranian and US pressure on their respective allies could bring them to the table. As part of an Iran-US peace deal, Tehran and Washington would commit to bring about an Israel-Hezbollah negotiation within a stipulated period.

In sum, all may not yet be lost.

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Lebanon, Israel hold historic direct talks

Israel says Lebanese govt ready to break with Hezbollah; militant group opposes Washington meet

Kareem Chehayeb
& Matthew Lee
Washington, April 14

LEBANON AND Israel opened their first direct diplomatic talks in decades on Tuesday in Washington following more than a month of war between Israel and the Hezbollah militant group.

US Secretary of State Marco Rubio called it a "historic opportunity," but made clear that no breakthrough agreement was immediately expected.

Rubio said the Trump administration is "very happy" to be facilitating the discussions, while noting "we understand we're working against decades of history and complexities" that will not be quickly resolved.

Reuters adds: The Israeli Ambassador to the US said that the Lebanese government made it clear in the meeting that it will no longer be occupied by Hezbollah. He added both parties talked about long-term vision for a clearly delineated border.

Hezbollah opposes the direct talks and was not represented, and the group appeared to step up its fire on northern Israel as the talks began. "But we can begin to move forward with a framework where something

can happen, something very positive, something very permanent, so that the people of Lebanon can have the kind of future they deserve, and so that the people of Israel can live without fear," Rubio said.

Rubio and US Ambassador to the United Nations Mike Waltz attended the opening of the session at the State Department that is being led by US Ambassador to Lebanon Michel Issa, Israeli Ambassador to the US Yechiel Leiter and Lebanese Ambassador to the US Nada Hamadeh Moawad.

The Lebanese government hopes the talks will pave the way to an end to the war. While Iran has set ending the wars in Lebanon and the region as a condition for talks with US, Lebanon insists on representing itself.

Wafiq Safa, a high-ranking member of the militant group's political council, told AP that it will not abide by any agreements made in the talks.

Hezbollah-allied politicians hold two Cabinet minister positions, though the group's ties have soured with Lebanon's top political authorities, who have been critical of Hezbollah's decision to enter the war last month.



From left: Michael Nedham, US State Department counselor, US envoy to the UN Mike Waltz, Secretary of State Marco Rubio, US envoy to Lebanon Michel Issa, Lebanese envoy to the US Nada Hamadeh Moawad and Israeli envoy to the US Yechiel Leiter before the meeting in Washington on Tuesday. AP

Xi: World can't go back to the law of the jungle

Associated Press
Beijing, April 14

THE LEADERS of China and Spain on Tuesday pledged to work to safeguard multilateralism at a time of conflicts including the war in Iran, with Chinese President Xi Jinping saying the countries should "oppose the world's retrogression to the law of the jungle."

Xi said they should "jointly safeguard genuine multilateralism," strengthen communi-



China's President Xi Jinping

cation and cooperate closely during a reception for Spanish Prime Minister Pedro Sánchez at the Great Hall of the

People. Sánchez agreed and said China and Spain "can contribute to finding solutions to the various trade tensions that exist, to the geopolitical difficulties and complexities of today's world, to the wars, to the environmental and social challenges that afflict the world."

Sánchez is on his fourth trip in just over three years to the world's second-largest economy. Spain is looking to strengthen political and commercial ties.

Six ships turned around as part of Hormuz blockade, says US military

Reuters
Washington, April 14

NOSHIPs have made it past a US naval blockade of Iran's ports and coastal areas, and six merchant ships have followed orders to turn back, the US military said on Tuesday, providing the first details on a day-of effort ordered by President Donald Trump after peace talks between the US and Iran broke down.

The US military has said that the blockade, which started on Monday, would only apply to ships going to or from Iran, including all Iranian ports on the Gulf and Gulf of Oman

"During the first 24 hours, no ships made it past the US blockade and six merchant vessels complied with direction from US forces to turn around to re-enter an Iranian port on the Gulf of Oman," the US military's Central Command said.

More than 10,000 US military personnel and dozens of aircraft were enforcing the blockade, it said. "The blockade is being enforced impartially against vessels of all nations entering or departing Iranian ports and coastal areas," the statement added.

China calls U.S. blockade of Iran ports 'dangerous'

Agence France-Presse

BEIJING

China accused the United States on Tuesday of "dangerous and irresponsible" behaviour over its blockade of Iranian ports, with President Xi Jinping vowing Beijing would play a "constructive role" in promoting peace in the West Asia.

U.S. President Donald Trump has threatened to sink ships entering or leaving Iranian ports and coastal areas in the Gulf after peace talks between Washington and Tehran failed over the weekend.

The blockade came into force at 1400 GMT on Monday, despite the United States and Iran agreeing to a fragile two-week ceasefire days earlier.

"The U.S. increased military deployments and took a targeted blockade action, which will only exacerbate tensions and un-



Guo Jiakun

dermine the already fragile ceasefire agreement and further jeopardise safety of passage through the Strait [of Hormuz]," Chinese Foreign Ministry spokesperson Guo Jiakun told a news conference. "This is dangerous and irresponsible behaviour," he added.

Iran has effectively closed the vital Strait of Hormuz, allowing only vessels serving countries it deems friendly – such as China – to cross.

Mr. Trump's blockade, analysts say, aims to starve Iran of funds and pressure

Beijing, the biggest buyer of Iranian oil, to push Tehran to open the strait, through which one-fifth of global oil transits in peacetime.

Tehran's ambassador to the United Nations called Mr. Trump's blockade a "grave violation" of Iran's sovereignty.

Speaking publicly about the war for the first time, Mr. Xi echoed those warnings, calling for the national sovereignty of countries in the West Asia and the Gulf to be "respected".

China also took a firm stance on Tuesday against Mr. Trump's threats to impose new tariffs on Chinese products entering the U.S. following reports Beijing was supplying or intends to supply weapons to Iran.

Mr. Trump had said he would hit China's goods with a 50% tariff if it provided military assistance to Tehran.

Modi, Trump discuss need to keep Strait of Hormuz secure

Kallol Bhattacharjee

NEW DELHI

Against the backdrop of continued tension in the Gulf region, Prime Minister Narendra Modi on Tuesday held a conversation with U.S. President Donald Trump and discussed the need for keeping the Strait of Hormuz “open and secure”. The telephone call from Mr. Trump came three days after the U.S. and Iran held a round of discussion in Islamabad to resolve the crisis that started with the U.S. bombing

Iranian targets in Tehran on February 28.

“Received a call from my friend President Donald Trump. We reviewed the substantial progress achieved in our bilateral cooperation in various sectors. We are committed to further strengthening our Comprehensive Global Strategic Partnership in all areas. We also discussed the situation in West Asia and stressed the importance of keeping the Strait of Hormuz open and secure,” said Prime Minister Modi in a post on X.

Trump turns on Meloni, says he is 'shocked' by Italian leader

Reuters

Rome, April 14

ITALIAN PRIME Minister Giorgia Meloni lacks courage and has let Washington down, US President Donald Trump told an Italian newspaper on Tuesday, delivering a blunt public rebuke to one of his closest European allies.

Meloni had been a vociferous supporter of Trump, but she distanced herself from him after he went to war with Iran in February, and on Monday she openly criticised him for lashing out at

Pope Leo, saying his verbal assault was "unacceptable".

Trump responded in an interview with *Corriere della Sera*, saying Meloni was "very different from what I thought" and denouncing her for refusing to help re-open the Strait of Hormuz, which has been blocked by Iran.

"I'm shocked by her. I thought she had courage. I was wrong," he was quoted as saying in the Italian-language article.

The White House declined to comment on the reported quotes. Meloni's office also declined to comment, but politi-



Donald Trump with Italian PM Giorgia Meloni at Mar-a-Lago in Palm Beach, Florida. FILE

cians of all stripes rallied to her defence, including Foreign Minister Antonio Tajani, head of the

coalition Forza Italia party. "We are, and will remain, sincere supporters of Western unity and steadfast allies of the United States, but that unity is built on loyalty, respect and mutual frankness," he said, applauding Meloni for denouncing Trump's attack on the Pope. "On Pope Leo XIV, she said exactly what all of us Italian citizens think," he added in a statement on X.

Trump's criticism marked a dramatic change in tone toward Meloni, the only European leader to attend his inauguration in 2025 and whom he

had hailed as "a great leader" just one month ago. On Tuesday, he accused her of failing to back US efforts to tackle Iran's nuclear programme and guarantee energy flows through the Gulf, saying she wanted America "to do the job for her."

Asked about her condemnation of his comments on Pope Leo, he said, "She is the one who is unacceptable, because she does not care whether Iran has a nuclear weapon and would blow Italy up in two minutes if it had the chance."

The reprimand capped a tu-

multuous month for Meloni, who lost a crunch referendum on judicial reform in March and then saw her political ally Viktor Orban ousted from power in Hungary.

The US-Israeli war in the Gulf threatens to upend the economy with surging energy costs and is hugely unpopular with Italians.

Seeking to distance herself from the conflict, Meloni refused to let US fighters use an airbase in Sicily for combat operations in Iran last month and on Tuesday, she suspended a military cooperation pact with Israel.

Ukraine & Germany to start work on joint production of advanced drones

Associated Press
Berlin, April 14

UKRAINE AND Germany are starting work on plans for the joint production of advanced drones and other battle-tested defence systems, President Volodymyr Zelenskyy said Tuesday, as Kyiv looks to scale up its more than four-year fight against Russia's all-out invasion.

"We have proposed to Germany a bilateral drone deal covering various types of drones, missiles, software and modern defence systems. Our teams are starting concrete work," Zelenskyy said at a joint news conference with Chancellor Friedrich Merz during a visit to Berlin.

Merz said that Germany's commitment to supporting Kyiv's war effort is "a very clear signal" to Russia. "We will not waver in our efforts to defend Ukraine," he said.

US-led diplomatic efforts to end Russia's war on its neigh-



German Chancellor Friedrich Merz (right) with Ukraine's President Volodymyr Zelenskyy in Berlin on Tuesday. REUTERS

bour have recently petered out as the Iran war grips the Trump administration's attention, although Tammy Bruce, the deputy US ambassador to the United Nations, told the UN Security Council on Monday that Washington "will continue to push for a negotiated and durable end" to the war.

Ukraine has the capacity to produce twice as much military

equipment as it's currently deploying, but lacks funding to step up production, according to Zelenskyy. "We simply don't have enough money," he said.

A key to unlocking that potential lies in obtaining a promised loan of 90 billion euros (USD 106 billion) from the European Union, which had been held up by Hungarian Prime Minister Viktor Orban.

FALL IN US TARIFFS FOR INDIA TO 10% FROM 50% SEEN OUTWEIGHING THE WAR IMPACT

IMF cuts global growth forecast, but raises India's by 10 bps to 6.5%

Multilateral agency's FY27 growth forecast is lower than RBI's 6.9%

Siddharth Upasani
New Delhi, April 14

THE INTERNATIONAL Monetary Fund (IMF) on Tuesday said the war in West Asia could turn into "the largest energy crisis in modern times" as it cut its global growth forecast for 2026 by 20 bps to 3.1%, with developing economies bearing the brunt of the downward revisions.

India, meanwhile, received a minor bump-up of 10 bps to its GDP growth forecast to 6.5% for FY27. Iran's economy is expected to shrink by 6.1% in 2026 as against a growth of 1.1% forecast in January.

"Absent the war, global growth would have been revised upward. Indeed, forecasts based on pre-conflict assumptions would have shown a slight upward revision of 2026 growth relative to the January WEO Update, by 0.1 percentage point (10 bps), to 3.4%," the IMF said in its flagship World Economic Outlook report.

"Hence, the downward revision for 2026 largely reflects the disruptions from the conflict in the Middle East, partly offset by

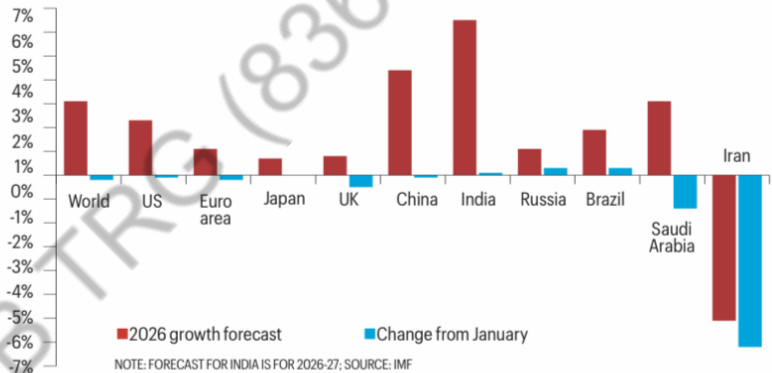
carryover from recent strong data and reduced tariff rates," it said, adding that risks "are firmly on the downside".

The release of the World Economic Outlook report comes amid the IMF and World Bank Group's Spring Meetings in Washington DC, US. The meetings, which began on Monday, will end on Saturday.

The IMF's forecast assumes oil prices will rise by 21.4% in 2026 to average around \$82 per barrel. The IMF expects global growth to edge up to 3.2% in 2027. Inflation, meanwhile, is seen rising to 4.4% this year before declining to 3.7% in 2027.

In January, the IMF had predicted global inflation to average 3.8% and 3.4% in 2026 and 2027, respectively. On Tuesday, it warned that central banks should be "prepared to act clearly and decisively" as per their mandates and "guard against prolonged supply shocks destabilising inflation expectations". The rise in energy prices and fuel shortages due to Iran's closure of the Strait of Hormuz and the hit to Gulf nations' energy infrastructure is leading to

West Asia war set to drag down global growth



higher inflation globally and hurting growth. India's GDP, meanwhile, is seen growing 6.5% in both FY27 and FY28.

This is slightly higher than the IMF's January forecast of 6.4% for both the years, but lower than the RBI's projection of 6.9% for the current fiscal.

The marginal upward revision for India comes after stronger-than-expected growth in 2025, with the economy expanding by 8.4% and 7.8% in the final two quarters of the year.

The IMF sees the fall in US tariffs for India to 10% from 50%

outweighing the adverse impact of the conflict. Meanwhile, inflation is likely to average 4.7% in FY27 and 4% in FY28. This is broadly in line with the RBI's expectation of 4.6% for this year.

The IMF said Tuesday that its forecasts assume the war will go on for a "few more weeks" and that its disruptions will fade by mid-2026. However, it admitted that "odds of a range of outcomes — from ceasefire to serious escalation of hostilities — shift by the day". It also considered "adverse" and "severe" case scenarios. In the "adverse" sce-

nario — which assumes a crude oil price of around \$100/bbl in 2026 and \$75/bbl in 2027, among other variables — global growth is seen falling to 2.5% this year and to 3% in 2027.

Inflation, on the other hand, would rise to 5.4% and 3.9%.

The "severe" case scenario assumes a crude oil price of around \$110/bbl in 2026 and \$125/bbl in 2027. This would lead to world growth falling to around 2% in 2026, implying "a close call for a global recession".

FULL REPORT ON

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