

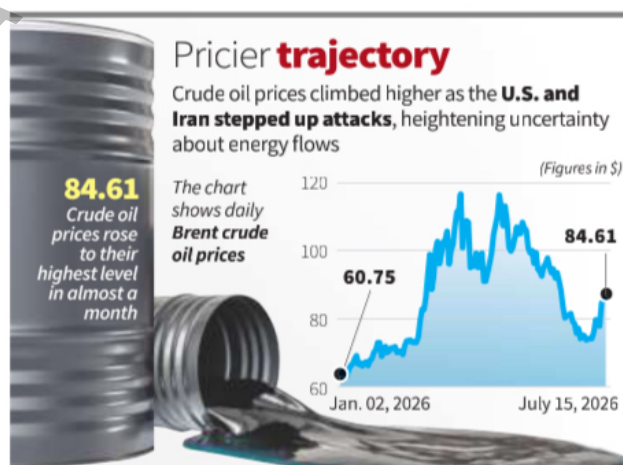
Iran threatens regional oil blockade over U.S. actions

Oil and gas 'will either be for everyone or no one', says Iran as U.S. claims 'wave of strikes'; U.S. blockade has 'dismantled' the peace MoU, says Tehran: **Brent crude price nears \$85 a barrel**

Agence France-Presse
TEHRAN/WASHINGTON

Returning to war nearly a month after signing a memorandum of understanding towards peace in West Asia, the U.S. and Iran on Wednesday launched strikes on targets across the region.

While the U.S. Central Command said it launched "a wave of strikes... designed to further degrade military capabilities Iranian forces have used to attack commercial shipping in the Strait of Hormuz", Iranian state media reported explosions near the port city of Bandar Abbas, on the island of Qeshm, and on Bandar Imam Khomeini. Iranian media later said new U.S. strikes hit the southern port city of Bush-



ehr, home to the country's only civilian nuclear plant.

Iran's Revolutionary Guards said they targeted the U.S. Fifth Fleet in Bahrain, where the military said it had intercepted attacks against civilian targets, while Jordan's armed forces said they had downed three missiles

from Tehran. Deputy Foreign Minister Kazem Gharibabadi said the renewed U.S. blockade on Iranian ports "has, in a way, dismantled the Islamabad memorandum", referring to the interim deal reached last month to halt hostilities and pursue peace talks.

The Guards also threatened on Wednesday to halt all energy exports from West Asia over the blockade. "The export of oil and gas from the region will be either for everyone or for no one," it said.

The Brent crude oil, the international standard, traded close to \$85 a barrel on Wednesday – more than 15% higher than the price before the war, but still below the nearly \$120 reached at the height of the conflict. Analysts with the

International Monetary Fund (IMF) have warned that while a surplus of oil had kept prices low, "much of that room has now been used up".

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TRUMP'S WARNING

» **PAGE 14**

Iran warns of blockade over U.S. actions

“As tensions flare again in the Strait of Hormuz, that room [from oil surplus] is now smaller and shrinking further as spare capacity has been deployed, demand has compressed, and inventories have been drawn down,” Azim Sadikov and Jean-Marc Natal from the IMF wrote in a blog post. “Unless inventories are replenished, the world will start from a weaker position when the next shock comes.”

At the heart of the resumption of hostilities has been the dispute over the Strait of Hormuz, a waterway that is crucial for global oil and gas flows.

Iran blockaded Hormuz after the U.S. and Israel launched their massive attack on February 28, using it for leverage against its foes for months before briefly reopening it, and then again vowing it would be closed “until the U.S. ends its aggression”.

The U.S., in turn, has reimposed its own blockade of Iran’s ports, though Mr. Trump has backed down on a planned 20% levy on ships using the strait.

Since the war began, Iran has asserted its control over the strait and opened fire on ships for taking routes it says are unauthorised.

“The retaliatory operations of the fighters will continue, and the strait will remain closed until the U.S. ends its acts of aggression,” the Guards have said.

Recent escalations

A Norwegian tanker was hit by an explosion caused by an unidentified device off the Omani coast early on Tuesday, the crisis response company MTI Network said.

Kuwait said one of its naval vessels was struck during an Iranian missile and drone barrage, wounding four crew members.

Since last week, renewed U.S. attacks have killed at least 30 people in Iran, a government spokesperson said. Separately, the military announced that seven of its personnel were killed in Wednesday’s strikes on the southeast.

Trump threatens to hit Iran power plants, bridges next week if no deal

'We're going to knock out all their power plants. We're going to knock out all their bridges unless they get to the table and negotiate,' says U.S. President, adding that strikes will continue; U.S. says Iran had attacked seven ships over the past week

Agence France-Presse

WASHINGTON

President Donald Trump said on Tuesday he would expand U.S. strikes on Iran next week to target power plants and bridges if Tehran does not make a deal.

"Next week it gets really bad for them because next week comes the power plants. Next week comes the bridges," Mr. Trump said in an interview with Fox News.

"We're going to knock out all their power plants. We're going to knock out all their bridges unless

they get to the table and negotiate." Mr. Trump's comments came as U.S. forces carried out strikes against Iran for a fourth day in a row and reimposed a naval blockade on the country's ports.

A fragile June 17 ceasefire between the two sides has effectively collapsed, with the focus on control of the crucial Strait of Hormuz.

Asked how long the U.S. strikes would carry on, Mr. Trump replied: "They'll continue until I say it's enough."

Meanwhile, Iran's Islamic Revolutionary Guard



Energy targets: The reactor building of the nuclear power plant, just outside the southern city of Bushehr in Iran. AP

Corps threatened to close "all other export corridors that benefit the U.S. and its allies", Iranian media re-

ported. "Regional energy exports are either shared by all, or denied to all," the IRGC said in a statement

carried by Iran's IRNA state news agency on Wednesday.

A senior Houthi official warned on Monday that the group was prepared to close the Bab el-Mandeb Strait – a move he said could send oil prices soaring to \$200 a barrel – if Saudi Arabia continued to attack Yemen, according to a report on Iran's Press TV website.

The United States said Iran had attacked seven commercial ships over the past week, leading to nearly a dozen crew members being killed, missing or injured.

Iran's disruptive strategy, its global consequences

Iran's recent actions over the Strait of Hormuz and its strategy of targeting its neighbours in the Gulf as retribution for the actions of the United States may seem to have been operational masterstrokes. However, in the long run, they may well prove to be strategic blunders that have antagonised the world at large and leave Iran out of the global mainstream and away from the path of sustained economic progress.

A strategy of disruption

For decades, Iran has overplayed its hand in presenting itself as standing up to what it has termed "continued Western imperialism" and in supporting the Palestinian cause through the lens of Islamic resistance – a policy that was not endorsed by most other developed and developing Islamic nations. As the Islamic regime in Iran grew in power, buoyed by its success in standing up to a powerful Iraq during the Iran-Iraq war that stretched through the 1980s, so too did its frustration at being unable to deliver telling blows against the "Big Satan-Little Satan" combination, as it referred to the U.S. and Israel, respectively.

Consequently, it engineered the second phase of its disruptive strategy in the late 1990s by developing and supporting proxies such as the Hezbollah, Hamas and Houthis, commonly known as the Axis of Resistance, and liberally endorsed their use of terrorism to cause widespread disruption in the region.

Here again, the Iranians have achieved much tactical success over the last two decades and kept West Asia on tenterhooks, but at a much larger level, it has widened the chasm that exists between itself and the rest of the world barring Russia, China and North Korea. It is this quartet which is shaping the trajectory of fundamentally disruptive resistance to the existing global order.

When you compare this with the orderly way



Arjun Subramaniam

Strategic affairs analyst

Tehran needs to recognise the limits of its current geopolitical advantage

in which countries such as India are also challenging the existing global order with a call for greater multilateralism through dialogue and consensus, one can clearly figure out Iran's disruptive path.

Notwithstanding much assertion of civilisational and cultural linkages, India has maintained a steady transactional relationship with the Islamic Republic of Iran, revolving principally around energy flow, trade corridors and the Chabahar port. Much in tune with its foreign policy of multilateralism in a multi-polar world, it managed to navigate the sanctions regime imposed on Iran by the West and maintained some energy flow based on national interest till it found alternate means and then gradually reduced its import of Iranian crude.

India's approach

India has only modest diplomatic leverage with Iran and rightly chose not to position itself as an interlocutor during the recent conflict, preferring instead to resort to quiet back-channel diplomacy and frequent calls for restraint. India co-sponsored the UN Security Council Resolution 2817 (2026), which officially condemned Iran's military attacks and aggressive actions against the Gulf Cooperation Council (GCC) nations and Jordan. Adopted on March 11, 2026, the resolution demanded that Iran immediately cease all attacks and threats, particularly those targeting international navigation through the Strait of Hormuz.

Iran has no doubt been emboldened by its ability to withstand months of the U.S.-Israel bombing campaign. It has come out of the conflict battered and embittered but still standing. With large portions of its military capacity still intact and a regime in power that seems to be now dominated by a combination of the Islamic Revolutionary Guard Corps (IRGC)

and hard line clerics, it appears that the region can expect continued acts of isolated belligerence that stay below the threshold of conflict. The frenzy of stage-managed grief and genuine hatred towards the U.S. and Israel that was on display on the streets of Tehran for the funeral of its slain leader, Ali Khamenei does not augur well for the future.

Iran's proposal to levy 'special rates' on friendly countries for transit through the Strait of Hormuz is another disruptive attempt at preventing any collective action from energy-hungry countries eager to benefit from this offer.

More recently, Iran's strikes on tankers following the Omani route through the Strait of Hormuz highlight its propensity to engage in coercive brinkmanship. Such an environment is highly unsettling for a large part of the world including India for obvious reasons – energy and trade corridors running through a volatile geopolitical arena.

The choice before Iran

It is time that collective pressure from countries other than the West starts building on Iran to desist from its varied coercive methods to keep the region on the edge. As the U.S.'s appetite to remain embroiled in the conflict waxes and wanes, and Israel strains to 'finish off the job it started', Iran needs to take a step back and not overplay the advantageous geopolitical hand it currently holds.

As a first step, it must look for windows to extract legitimate leverage accruing from the proposed de-freezing of its assets and widening energy flow from its embattled oil fields and refineries. Despite its isolation from the West, Iran is categorised as an upper-middle-income economy and has much potential for rapid growth, should it desire so for its people.

MUZAFFARABAD

Nine killed and dozen wounded in protests in Pak.-occupied Kashmir



AFP

▲
Nine persons were killed and a dozen wounded in renewed clashes between supporters of the banned Joint Awami Action Committee (JAAC) and security forces in Pakistan-occupied Kashmir, an official said on Wednesday. “Seven civilians, one paramilitary personnel and one police officer were killed,” officials said. AFP

WASHINGTON

U.S. Senators vie to levy 100% tariffs on countries buying oil from Russia



AFP

▲
A bipartisan group of U.S. Senators unveiled a Bill that seeks to impose 100% tariffs on five countries, including India and China, for purchasing oil from Russia. The Bill, brokered by late Republican Senator Lindsey Graham, exempts 15 European nations that buy gas from Russia from the tariffs. PTI

Assam Rifles camp attacked, vehicles torched in Manipur

Violence occurred after paramilitary forces launched search operations close to an NSCN (I-M) camp, a Defence spokesperson said; residents stopped patrol columns from entering villages

The Hindu Bureau

GUWAHATI

A mob threw stones, vandalised an Assam Rifles camp and damaged four vehicles of the security forces in Senapati town of Manipur around 9.30 p.m. on Tuesday.

The attack occurred after the paramilitary forces launched an area domination patrol and search operation based on "credible intelligence inputs" regarding the presence of armed cadres in Makuilongdi, about 2 km west of a designated camp of the NSCN (I-M) at Oklong.

The NSCN (I-M) refers to the Isak-Muivah faction of the National Socialist Council of Nagaland. The outfit prefers to call itself the National Socialist Council of Nagalim.

"The intelligence reports and social media posts indicated the presence of armed cadres moving outside designated camps, carrying weapons and wearing uniforms, in violation of established Ceasefire Ground Rules,"

the Defence spokesperson said on Wednesday.

The Ceasefire Monitor-



Tensions boil over: Charred remains of a vehicle following a mob attack in Senapati district of Manipur on Wednesday. PTI

ing Group, which observes, verifies, and reports on compliance with agreed pauses in fighting, was formally informed regarding the reported violations, highlighting the security concerns, he said.

Entry stand-off

"During the course of the operation, residents, including women, obstructed the Assam Rifles columns approaching Makuilongdi and Oklong villages. The columns exercised maximum restraint

and communicated with the local representatives, adding that the operations were aimed solely at ensuring security and maintaining peace in the area, and that the columns would not enter any village without the consent of the authorities," the spokesperson said.

As tensions escalated, a large crowd gathered in Senapati town around 9 p.m. and prepared to march towards the Assam Rifles at Naga Taphou in the district. "Despite the withdra-

wal of the columns, a large mob reached the camp around 9.30 p.m., hurled stones, damaging property and attempting acts of arson," the spokesperson said.

"The mob vandalised and damaged Assam Rifles vehicles. A light vehicle was set ablaze, while two trucks were overturned and damaged. A car of a civilian was also burnt during the violence," an Assam Rifles official said.

Situation under control

Minimum force was applied to disperse the violent crowd in coordination with the Manipur Police and the Central Reserve Police Force, he added.

The situation in Senapati was under control, a district official said.

"Neither the local people nor the security personnel sustained any injuries," he said.

On July 6, unidentified gunmen ambushed an Assam Rifles patrol in Ukhrul district, killing two personnel and injuring several others. Ukhrul, adjoining Senapati, is considered the political heartland of the NSCN (I-M), which is in ceasefire mode since 1997.

Wangchuk loses 8.9 kg as fast for Pradhan's resignation continues

The Hindu Bureau
NEW DELHI

Activist Sonam Wangchuk's indefinite hunger strike demanding the resignation of Union Education Minister Dharmendra Pradhan entered its 18th day on Wednesday, with his deteriorating health drawing concern from civil society groups, and Opposition leaders. Many of whom have urged him to end the fast.

Mr. Wangchuk is close to emaciation, according to medical reports published by the Cockroach Janta Party (CJP), the organisation leading the protest.

Over the past two weeks, Mr. Wangchuk's condition has worsened, needing increasing medical supervision.

Mr. Wangchuk, 59, has lost 8.9 kg since he began fasting, according to a re-



Worsening condition: Activist Sonam Wangchuk and CJP founder Abhijeet Dipke at the protest site. SHASHI SHEKHAR KASHYAP

view of his condition published by the CJP over the past week. Mr. Wangchuk's vital signs have hit and exceeded thresholds described in medical literature for hunger strikers.

In a video posted late Wednesday evening, Mr. Wangchuk sought to assuage concerns around his health. "My condition isn't so bad that I'll die in two days," he asserted. "My vitals are normal for some-

one who is on the eighteenth day of a fast... Instead of asking me to end this fast, I request everyone to join us on July 20 for our March to Parliament," he said.

The government has remained silent on Mr. Wangchuk's protest.

"The man who chose to put his own life on the line to seek justice for students who died by suicide has received nothing but silence

from the govt. The govt is not just unaccountable; it is also cruel," CJP founder Abhijeet Dipke said.

"Instead of asking why Opposition leader hasn't supported CJP, or why every CJP team member isn't on a hunger strike alongside Sonam sir, ask the questions that actually matter. Why is the Prime Minister refusing to engage in a dialogue?" he said.

Bhim Army chief and MP Chandrashekhar Azad, Samajwadi Party MPs Mohibullah Naqvi and Ajendra Singh Lodhi, Trinamool Congress MP Dola Sen, Congress MP Prashant Yadaora Padole, and CPI MP Sandosh Kumar visited the protest site on Wednesday. Comedian Kunal Kamra also visited the site.

Congress MP Shashi Tharoor wrote a post on X appealing to Mr. Wangchuk to end his fast.

Digitisation and efficiency in criminal justice system

The shift in approach to justice has contributed to making the criminal justice system more citizen-oriented

LETTER AND SPIRIT

C.B.P. Srivastava

Recently, the Centre has announced that India aims for full digital rollout of its criminal justice system from July 1, 2027 after which the procedures related to investigations and trials under the new criminal laws will be recorded digitally through the Interoperable Criminal Justice System. The efficiency of any criminal justice system largely depends on the procedural efficiency beginning from the registration of the first information report (FIR) to investigation, filing of chargesheet outlining specific charges levelled against the accused and presenting the evidence and witness testimonies gathered to substantiate them, trial and finally the disposal. In the

digital system the data is stored on the government's cloud platform, MeghRaj.

Understanding criminal justice system

The criminal justice system comprises the police, courts, prisons, forensics, and prosecution services, and aims at ensuring that individuals who suffer injury or loss at the hand of others can present their cases and seek justice.

Justice cannot be delivered unless the rights of the accused and the interests of the victim and the society are balanced. This has been the fundamental principle of the criminal justice system, particularly in common law countries that follow the adversarial system. These countries base their legal systems primarily on judicial precedents and uncodified case law rather than strict statutory codes. This principle also gives the accused a fair chance to present his case in accordance with the tenets of natural justice, that is,

the rule of fair hearing (*Audi alteram partem*). In other words, no person should be condemned unheard. The system seeks to ensure procedural fairness. On the other hand, the inquisitorial system is practised in civil law countries, where rules are codified into comprehensive written statutes rather than shaped by judicial precedent. Under this system, the judge plays an active role in investigating the facts and determining the outcome of the case on the basis of inquiry and investigation. Thus, the precision of decision depends largely on the skills and prudence of the judge concerned.

Changed attitude

The reforms in the criminal law have opened a new avenue for the delivery of justice. To be more appropriate, the Indian Penal Code (IPC) and the Code of Criminal Procedure (CrPC) have been replaced by the Bhartiya Nyaya Sanhita

(BNS) and Bhartiya Nagrik Suraksha Sanhita (BNSS) with the idea of transformation. While the erstwhile penal code was implemented with an idea to punish the accused, the BNS believes in the delivery of justice through retribution. The new code has a democratic approach, placing greater emphasis on individual than on the state in matters relating to crimes. The criminal procedure code believed that trial of a 'criminal' was being conducted whereas the BNSS considers an accused as a citizen whose rights should be balanced with the interests of the victims without any prejudice. Thus, the shift in approach to justice has contributed to making the criminal justice system more democratic and citizen-oriented, while strengthening the protection of the principles of natural justice that are embedded constitutional framework of India.

Reforms in the system

It is well established that every system requires periodic reform to remain responsive to changing needs and circumstances. The judiciary plays a vital role in this process by guiding the state through its directions and rulings. Against this backdrop, it is important to note that courts have laid down procedures governing several aspects of the criminal justice system. Through their decisions, courts often seek to fill legislative gaps in

areas where the law is silent, thereby ensuring the effective administration of justice. For example, the Supreme Court in *Visakha v. State of Rajasthan (1997)* gave guidelines to prevent sexual harassment of women at workplace holding that such an act violates Articles 14, 15 and 21 of the Constitution.

The recent announcement by the Centre to enhance the efficiency of the criminal justice system through digitisation assumes considerable significance. In the field of forensics, the new criminal laws have made forensic examination of crime scenes mandatory for offences punishable with imprisonment of seven years or more. In view of this requirement, the number of forensic laboratories has increased from 129 in 2023 to 154 in 2025. However, according to the National Crime Records Bureau, only 46% of FIRs were digitally transmitted to courts. Since this accounts for less than half of all registered cases, it suggests that the digital chain of the criminal justice system remains incomplete.

Although most states have implemented various components of the criminal justice digitisation system, progress remains uneven. In this context, full digital rollout by 2027 will fill this gap and make the system more efficient.

The author is President, Centre for Applied Research in Governance, Delhi.

Kudankulam nuclear plant data leak sparks 'absolute commotion'

P. Sudhakar
TIRUNELVELI

The leak of highly sensitive files of Kudankulam Nuclear Power Plant (KKNPP), reportedly accessed by a ransomware group from a contractor's server, has triggered "absolute commotion" in the plant, KKNPP sources said on Wednesday.

After commissioning two 1,000 Mwe VVER reactors, KKNPP is building four more such units with Russian collaboration.

Sources said the top brass of the upcoming nuclear park is "completely clueless" about the development that poses a security threat as it may let an adversary map the support system and identify vulnerabilities.

According to *Reuters*, more than 19,000 files dating between 2016 and mid-2025, and linked to KKNPP's engineering blueprints on control, cooling and ventilation systems,



The reported data leak comes amid construction of four VVER reactors at the plant. FILE PHOTO

list of vendors and suppliers, etc. had been accessed by World Leaks.

Nuclear Power Corporation of India Limited said the information claimed to be available in public domain pertains to "conventional balance of plant common service facilities" and does not relate to any nuclear safety or nuclear security-related systems.

The leak originated from a server hosted by third party provider Yotta. The plant's contractor, Anil Ambani's Reliance Group, has admitted that a "partial breach" had hap-

pened and the government had been informed.

"Suspicious activity on Yotta's server was noted on May 29 last and it was reported in June-end. Investigations by Nuclear Power Corporation of India Limited, the project proponent, and Computer Emergency Response Team are on," the sources said.

Reliance Group's Reliance Infrastructure bagged the contract in 2018 to build infrastructure for reactors 3 and 4, both under construction.

When the KKNPP encountered a similar incident in 2019, wherein a North Korean malware infection on its administrative network exposed the plant's vulnerability, NPCIL had dismissed it saying that their "unbreachable standalone network" was intact and no data could be accessed by any dark web.

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Cabinet approves Bill to fine officials for delay in services

Penalty of up to ₹5,000 to be imposed only after hearing official, says CMO; proposed law set to replace 2011 Act likely to be tabled in Monsoon Session; step towards administrative reforms: CM

The Hindu Bureau

NEW DELHI

The Delhi Cabinet has approved the Delhi (Right of Citizen to Time Bound and Ease of Delivery of Service) Bill, 2026. The proposed legislation is set to replace the Delhi (Right of Citizen to Time Bound Delivery of Services) Act, 2011.

The new Bill proposes to impose a fine of ₹250 per day, subject to a maximum of ₹5,000, on erring officials if a service is delayed without valid justification. However, the penalty will be imposed only after giving the official a full opportunity to present an explanation, in keeping with the principles of natural justice, read a statement issued by the Chief Minister's Office (CMO).



CM Rekha Gupta said the Bill is intended to ensure that every citizen receives notified services within the prescribed timeline. FILE PHOTO

The government is expected to table the Bill in the Monsoon Session of the Delhi Assembly.

Under the 2011 Act, government servants who failed to deliver services to citizens within the stipulated time were liable to pay them ₹10 per day for the entire period of the delay, subject to a maximum of

₹200 per application, as “compensatory cost”.

Covers 500 services

Last month, the Delhi government brought 23 more services under the 2011 Act, taking the total number of services under the time-bound delivery mechanism to over 500.

Chief Minister Rekha

Gupta said the Bill is intended to ensure that every citizen receives notified services within the prescribed timeline and government departments and officials are more accountable for delays and negligence in service delivery. Ms. Gupta added that the law would mark a significant step towards administrative reforms and serve as a milestone in providing citizens with more transparent, simple, efficient, and technology-driven public services.

The government will notify, from time to time, the services that fall under the ambit of the law. Government notifications will specify the services covered, their timelines, and the designated officers responsible for delivering them, the CMO stated.

Fulfil the promise

New Delhi cannot keep stalling the restoration of Statehood to J&K

It has been over two and a half years since the Supreme Court of India recorded the Union government's solemn assurance that Statehood would be restored to Jammu and Kashmir (J&K). It set no timeline, but the expectation was that it would happen within a reasonable period and steps would be taken progressively. That the Bharatiya Janata Party (BJP)-led government has done nothing on this front since then can only mean that it has interpreted the lack of a timeline as a licence for the indefinite deferral of Statehood. This is despite repeated assurances from the Centre. Prime Minister Narendra Modi pledged it in the run-up to the J&K elections, and Home Minister Amit Shah reiterated it on the floor of Parliament. Unsurprisingly, the inaction has driven J&K Chief Minister Omar Abdullah to organise a series of agitations and rallies, culminating in a sit-in at Jantar Mantar on July 20. His grievance, and that of the province, is legitimate. The retention of Union Territory status even after popular elections subordinates the elected government to an unelected Lieutenant Governor who retains preponderant authority over the bureaucracy, the police and other institutions. There is no principled justification for perpetuating this arrangement once elections have been held and a government installed.

New Delhi's rationale for inaction has been trite: "security", invoked by the Solicitor-General before the Court late last year, citing the Pahalgam attack, in a hearing on a petition seeking restoration of Statehood. But this argument cuts no ice. By the government's account, the attack was orchestrated from across the border, and India responded with Operation Sindoor. A cross-border provocation can have no logical bearing on whether J&K's elected representatives are to be trusted with the powers of a full State. If anything, empowering elected leaders to address local grievances is precisely how a polity assuages concerns before they turn into resentment, which fed into cycles of militancy in the Kashmir Valley for decades. The Centre's handling of J&K, Ladakh and even Manipur reveals a troubling pattern in how border regions with substantial minority populations are treated. Secure in its dominance across the north, the west and now the east, the BJP appears to regard the concerns of citizens in these provinces as expendable. Such a view is myopic: governance that treats a border region as politically dispensable only deepens alienation, and instability soon spills over and unsettles governance overall. The BJP seems cynically content to leave the Statehood question hanging until the political arithmetic, already sought to be reworked through delimitation in J&K, tilts decisively in its favour. A promise made to the Court, to Parliament and to the people of J&K cannot be held in abeyance until political circumstances turn expedient for the BJP.

SAYS MAY SUPPORT IF 50% INCREASE IN SEATS IN ALL STATES

Delimitation Bill: Ahead of House session, Sule signals options open

Says INDIA bloc to take collective call, plays down crossover buzz

Alok Deshpande
Mumbai, July 15

SIGNALLING ANOTHER break in the Opposition ranks ahead of the Monsoon Session of Parliament, the Sharad Pawar-led NCP(SP)'s working president and MP Supriya Sule on Wednesday said her party



NCP (SP) leader Supriya Sule in Mumbai, Wednesday. AKASH PATIL

would consider supporting the Centre's proposed delimitation Bill if it ensures a 50 per cent increase in the Lok Sabha seats in all states.

Sule's remarks came amid reports that sections of the

NCP(SP)'s MPs and MLAs were increasingly pushing for a tie-up with the ruling BJP-led NDA.

There has been a buzz about the NCP(SP)'s next moves in the wake of a series of meetings between its leaders and senior BJP and government functionaries over the last several days.

With the Parliament session getting underway on July 20, the Narendra Modi government has stepped up its efforts to muster a two-thirds majority to push a fresh constitutional amendment Bill to advance reservation for women to 2029 – along with a delimitation Bill

»CONTINUED ON PAGE 2

Sule

for expansion of the Lok Sabha from 543 MPs up to 850 – which was defeated in the Lower House in the April special session. Along with other INDIA bloc allies, the NCP (SP) had then voted against this constitutional amendment Bill.

On Wednesday, Sule told **The Indian Express** that “If the Union government amends the delimitation Bill by bringing a 50% increase in seats, then we will support it. This is not something new that I am saying. We have always maintained that we will support the Bill if these amendments are brought. There is no change in our stand.”

However, later in the day, addressing a press conference, Sule appeared to water down her stance. “We haven’t received any Bill on delimitation as of now. Previously, when the Bill was brought, the Opposition raised the amendment of increasing seats by 50 per cent. Whenever the Bill is presented to us, we will discuss it with the INDIA bloc parties. We will make a collective decision. It is important that the delimitation formula is also presented to us and we are told how new demarcation will be done,” she said.

Hours later, Sule calibrated her position further. “Recent re-

ports appearing in sections of the media regarding the stand of the NCP(SP) on the issue of delimitation are inaccurate and speculative. I wish to clarify that neither I nor the party has had any official discussion with any media organisation on this subject,” she said in a post on X.

“As with every issue of constitutional importance, our party’s position is determined only after detailed consultations within the party and with our allies – India alliance... Since no such Bill has yet been made available, any speculation regarding its contents or our position would be premature,” said Sule, Pawar’s daughter.

Sule also told the press conference that the demand to increase seats by 50 per cent had been raised by several Opposition parties, including the Trinamool Congress (TMC), Samajwadi Party (SP) and DMK, when the legislation was first introduced in Parliament. “All of us, including the TMC, SP and the DMK, had taken this position. It is not something that is being said for the first time,” she said.

When asked about speculations about the NCP(SP)’s legislators looking to “cross over to the NDA” or “merge with the NCP”, Sule said there was no such proposal before the party. “Nobody has asked about this, nor have any of our leaders ex-

pressed the desire to switch over. All stand united with Sharad Pawar and will follow every decision to be taken by Sharad Pawar,” she said.

Sule played down reports about the NCP(SP)’s alleged proximity to the BJP, and also its state party president Jayant Patil’s meeting with Maharashtra Chief Minister Devendra Fadnavis late on Tuesday night.

“When I was in Lucknow for a Parliamentary committee meeting, I openly met Uttar Pradesh Chief Minister Yogi Adityanath. If our party really wanted to ally with the BJP, we would not be meeting openly,” she said.

Patil had met Fadnavis hours after calling on Sharad Pawar at his Mumbai residence. Senior leaders of the BJP’s ally NCP, Sunil Tatkare and Praful Patel, also met CM Fadnavis separately the same night, fueling fresh buzz over political realignments.

Sources told The Indian Express that these meetings came against the backdrop of a “re-think” within the NCP (SP), with at least half of its 10 MLAs favouring a switch to the NDA while arguing that remaining in the Opposition has made it increasingly difficult to secure development funds and administrative clearances for their constituencies.

Patil, however, also sought to

downplay his meeting with Fadnavis. “I met the Chief Minister to discuss the issue of disqualifying the chairman of the Islampur Municipal Council. I do not know about the meeting between Tatkare, Patel and the CM,” he said. He dismissed reports of merger talks with the NCP. “I have not met Tatkare and Patel regarding any merger plans. After the death of Ajit Pawar, no such discussion has taken place,” he said, adding he felt “sad” whenever the media discussed him leaving the party.

The political chatter over the NCP(SP)’s possible bid to switch to the NDA fold intensified after six Shiv Sena (UBT) Lok Sabha MPs recently joined the Eknath Shinde-led Shiv Sena, citing better access to government approvals and development funds. That, sources said, has prompted sections within the NCP (SP) to argue that the party should also reconsider its position.

Although the NCP (SP), with 10 MLAs and eight Lok Sabha MPs, is the smallest among Maharashtra’s six major political parties, its parliamentary strength has assumed significance as the NDA looks to secure the support of a two-thirds majority in both Houses to ensure the passage of several key legislation, including a fresh women’s quota Bill along with a delimitation legislation.

• GLOBAL

In China's new ballistic missile test, the worries for Indo-Pacific region



EXPERT EXPLAINS

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CHINA TESTED its sea-based long-range intercontinental ballistic missile (ICBM) last week (July 6), marking its first-ever test of a submarine-based ballistic missile in international waters. This is the People's Liberation Army's (PLA) second launch of a ballistic missile in international waters since 1980. China conducted a land-based ICBM test on September 21, 2024.

The latest test missile was reportedly launched from a submarine in the South China Sea. It was carrying a dummy war-

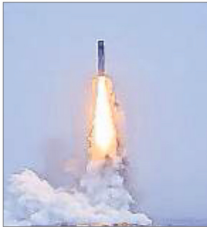
head that covered a distance of 7,300 km, reportedly flying over the Philippines, before landing in the Southern Pacific Ocean. The dummy warhead landed within an area designated under the Treaty of Rarotonga's South Pacific nuclear-free zone (where testing or stationing of nuclear explosive devices is barred), after it flew over the Exclusive Economic Zones of Micronesia, Nauru, Kiribati and Tuvalu.

What is known about this missile test?

It is difficult to determine if the missile was Ju Lang 2 (JL-2) or the latest Ju Lang 3 (JL-3). Both JL-2 and JL-3 are submarine-launched ICBMs, jointly developed with DF-31 and DF-41, respectively. ICBMs generally have a range of at least 5,000 km, and the JL-2 is capable of travelling 8,000-9,000 km. The JL-3 reportedly has a range of over 9,000 km. Both delivery systems can be paired with China's Type 094 SSBNs (nuclear-powered submarines with ballistic missiles).

Why is Beijing testing now?

Since the turn of the decade, and especially in the past two years, Beijing has



The ICBM being tested on July 6. X/@MIND_CHINA

not shied away from overtly tomming its improving nuclear capabilities.

It has constructed multiple missile silos — without camouflaging them and with the awareness that they will be noticed by American satellites. Additionally, it displayed new and advanced nuclear delivery

systems in its 2025 military parade and carried out a land-based ICBM test in the Pacific Ocean in 2024.

China wants the world, and the US in particular, to take note of its improving nuclear capabilities. These developments can be attributed to factors such as China's efforts to demonstrate the construction of its nuclear triad (having the capability to deliver nuclear weapons via land, sea and air).

It could also be attributed to China attempting to improve its second-strike capabilities, which are an extremely important part of its deterrence posture, since only India and China are the two declared "No-first-use" nuclear weapons states.

Beyond these simplistic explanations, these developments could also be attributed to China's attempts to construct a nuclear shield, attain great-power status, or improve theatre-level nuclear dominance in the Indo-Pacific region.

Do these developments mean China's nuclear strategy has changed?

No. The important pillars of China's declaratory nuclear strategy are: i) No-first-

use nuclear policy, ii) Assured retaliation, iii) Not to use or threaten to use nuclear weapons against non-nuclear-weapon states or in nuclear-weapon-free zones.

However, China also subscribes to a "minimum nuclear deterrent" posture. With recent changes in size, diversity, accuracy, and posture, there is evidence that China is shifting away from its minimum nuclear deterrence approach.

For instance, China could possess around 1,000 nuclear warheads by 2030. It is shifting at least a part of its force towards a "launch on warning" operational readiness posture, which Beijing refers to as "early warning counter-strike" — wherein Beijing initiates a counter-strike once a launch warning has been received but before targets in China have been hit.

What are the implications for Indo-Pacific actors, including India?

For New Delhi, the recent test reinforces the widening strategic gap between India and China's nuclear arsenal and delivery capabilities — both qualitatively and quantitatively. While India has operationalised

nuclear triad by activation of the Arihant-class SSBNs, its submarine-launched ballistic missiles have shorter ranges.

The Chinese demonstration adds urgency for India to deploy its longer-ranged K-5 and K-6 missiles to ensure parity in second-strike survivability. With the launch of the JL missile from the fortified South China Sea, Chinese submarines reduce their detection risk. Thus, India needs to expand its anti-submarine warfare capabilities and seabed domain awareness, at least across the Indian Ocean Region.

Regional actors would also be aware that China's improved capabilities raise the cost of outside intervention in its sphere of influence during any contingency.

The test, however, comes at a time when, under Donald Trump, uncertainty around expectations of US military support has heightened. For the US and the rest of the world, the launch was a direct demonstration of the maturation of China's nuclear triad and its improved deterrence capabilities. It complicates US missile defence planning and may compel it to refocus its attention and resources from West Asia to East Asia.

INDIA IS THE SECOND-BIGGEST EXPORT MARKET FOR RUSSIAN CRUDE

US bill proposes 100% tariffs on top five buyers of Russian energy

Sukalp Sharma

New Delhi, July 15

A REWORKED bill, backed by a bipartisan group of US senators, proposes up to 100% tariffs on the top buyers of Russian oil and natural gas, which include India and China. The move comes amid renewed Gulf crisis with experts calling it impractical. The bill, initially

backed by the late US senator Lindsey Graham, was aimed at squeezing Russia's revenue from oil and gas exports. Following Graham's sudden demise last week, the group of US senators on Tuesday unveiled the revised version of the Russia sanctions bill.

Although it remains to be seen whether the bill will turn into law in its current form — considering the original bill failed to move beyond the initial phases for over a year — the proposed legislation would certainly be a cause of concern for New Delhi. Notably, the new

bill is a watered-down version of the original, and does offer some room for workarounds and concessions from Washington. India is expected to push for those, if at all, the bill

is enacted, according to industry experts and analysts.

The new bill proposes tariffs of up to 100% on the top five buyers of Russian oil and natural gas, against the proposal of a blanket 500% tariff on buyers of Russian energy in the original version that had been hanging fire. While this reduction in proposed tariffs appears meaningful on paper, the cap is still too high for India, which is also working to finalise a trade deal with the US. Importantly, from New Delhi's perspective, the new bill gives powers to the US president to issue waivers on its provisions.

"India would almost certainly push for it (waiver), and it would make sense for the US to agree as a friendly concession, especially given how serious the situation is for New Delhi," Abu Dhabi-based energy analyst Natalia Katona told *The Indian Express*. She added that the bill "risks colliding" with the India-US trade talks.

That would be counterproductive for both Washington and New Delhi, which have made progress in negotiations after initial setbacks and hiccups. The use of tariffs under



The new bill is a watered-down version of the original, and does offer some room for workarounds. REUTERS

the proposed law as leverage by Washington cannot be ruled out. Any such ploy by the US would create additional pressure on India. Even for Washington, taking away millions of barrels of Russian oil from the market when energy flows from West Asia remain stifled wouldn't be prudent. That would worsen an already worrying supply situation, sending oil prices soaring, something that the Donald Trump administration wouldn't want ahead of the US midterm polls.

Meaningfully reducing Russian oil imports is just not an

option in the prevailing circumstances of global supply tightness amid the West Asia crisis. As per Kpler data, India's Russian oil imports rose to 2.6 million barrels per day (bpd) in June, accounting for over half of New Delhi's oil imports. July could match or even exceed June's volumes.

"From India's perspective, Russian crude has become the country's strongest energy security hedge, particularly since the Strait of Hormuz disruptions. Russian barrels have enabled Indian refiners to maintain high refinery run

rates, ensure uninterrupted fuel supplies, and avoid the disruptions experienced by several other Asian refining systems," said Sumit Ritolia, modelling and refining manager at Kpler.

While there are calls from some US lawmakers to expedite the bill's passage, the prevailing energy market dynamics add an element of uncertainty. Nonetheless, India is expected to communicate its energy concerns to Washington, as was done last year as well when the original bill was mooted. Experts are also sceptical about the bill's prospects.

"The question is whether this bill is economically real at all. I simply do not see this bill passing, or remaining in its current form. It has already been diluted from a 500% tariff threat against virtually all buyers of Russian oil and gas to a maximum of 100% aimed at only the five largest. European exemptions and presidential waivers have also been added. That tells you the political slogan is already being adjusted to economic reality," said Katona.

FULL REPORT ON

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Cabinet okays Semicon 2.0, mobile, urea manufacturing schemes, highways

Projects cleared by the CCEA include two major highway projects worth ₹25,400 crore to ease congestion in Varanasi; 9 new gas-based urea plants with a production capacity of 10 MT; ₹1.27 lakh crore for the second edition of India Semiconductor Mission; and 62,500 crore for MPMS

The Hindu Bureau
NEW DELHI

The Cabinet Committee on Economic Affairs (CCEA), chaired by Prime Minister Narendra Modi, has cleared several projects, including ₹1.27 lakh crore for the second edition of India Semiconductor Mission and ₹62,500 crore for the mobile phone manufacturing scheme (MPMS) as part of efforts to localise manufacturing amid global geopolitical uncertainties.

The Cabinet also accorded approval to two major highway projects worth ₹25,400 crore to ease congestion in Varanasi and as many as nine new gas-based urea plants nationwide with a production capacity of 10 million tonnes.

Semicon Mission 2.0

The Cabinet has accorded approval for the ₹1.27 lakh crore for the second edition of India Semiconductor Mission through which the government expects to attract investments of around ₹4 lakh crore and lead to semiconductor production of ₹2 lakh crore during the scheme period.

The new edition of the semiconductor programme – which has provisions to incentivise even suppliers of raw material in the chip manufacturing industry, including minerals and gases – has come at an appropriate time when the

world is reeling under a memory chip shortage, and companies are working on plans to enhance production capacity. It also expects to attract investment from other chip segments to meet chip requirements for artificial intelligence devices.

Highlighting that “Semicon 2.0 will have six pillars. The first pillar will be the design of chips”; Information and Broadcasting (I&B) Minister Ashwini Vaishnaw said the programme will focus on design, development and production of indigenous chips. “We will be self-reliant in the production of indigenous chips by the end of this programme,” the minister said.

The government had allocated ₹76,000 crore for the first edition, under which it had approved 12 projects with cumulative investments of around ₹1.64 lakh crore.

The majority of the investment in the sector has come from technology firm Tata Electronics and its semiconductor arm.

Mobile manufacturing

The Cabinet also approved an outlay of ₹62,500 crore for the MPMS, aimed at building Indian brands to achieve technological sovereignty and scale up local mobile production to capture the significant economic value, and create Indian patents in design and

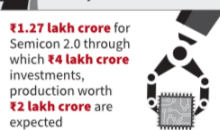
Big ticket

The Cabinet Committee on Economic Affairs chaired by PM Modi, cleared several projects across sectors

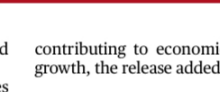
New National Investment Policy for Urea (NIPU-2026) to set up **8-9 new gas-based plants** with a production capacity of 10 MT to make the country self-reliant



NHAI project under Hybrid Annuity Model to include a **43.218-km** corridor linking NH-31 with Varanasi Ring Road for **₹10,998.32 crore**; a **46.039-km** corridor connecting NH-19 with the ring road at **₹14,447.64 crore**



₹62,500 crore for mobile phone manufacturing scheme, aimed at building Indian brands, scaling up local production



research and development.

“The scheme provides incentive support on eligible sales for manufacturing of mobile phones in India at differentiated rates ranging from 2.25% to 5%. Scheme also provides additional incentive of up to 1.5% linked to domestic sourcing of key components/sub-assemblies. For building Indian brands, an additional incentive at 3% on eligible sales for design and R&D of the product,” an official release said.

During the scheme tenure, the cumulative mobile phone production in the country is expected to reach about ₹39 lakh crore with significant increase in exports of mobile phones. The scheme is also expected to generate around 60,000 direct jobs thereby

contributing to economic growth, the release added.

Highways

The highway projects, to be implemented by the National Highways Authority of India (NHAI) under the Hybrid Annuity Model (HAM), include a 43.218 kilometre (km)/corridor linking NH-31 with the Varanasi Ring Road along Varuna River at a total capital cost of ₹10,998.32 crore and a 46.039 km corridor connecting NH-19 with the ring road along the Ganga River at a cost of ₹14,447.64 crore. The NH-19 project will feature a six-lane elevated carriageway, a cable-stayed bridge, an extra-dosed foot over bridge-cum-major bridge, loops, ramps, link roads and service roads. The NH-31 corridor will comprise a pre-

dominantly elevated four and six lane carriageway with flyovers, loops, ramps and service roads.

Designed for operating speeds of 80-100 kmph, the projects are expected to significantly reduce travel times across the city. The NH-19 corridor will cut travel time between NH-19 and Kashi Railway Station from around 50 minutes to 25 minutes, while the NH-31 project will halve the journey between NH-31 and Kashi Railway Station from 40 minutes to 20 minutes. The government said the corridors are part of the Varanasi Decongestion Plan and aligned with the PM Gati Shakti National Master Plan.

Urea demand

The Cabinet also approved the National Investment Policy for Urea (NIPU-2026) to set up “eight-nine” new gas-based plants with a production capacity of 10 million tons to make the country self-reliant in the most widely consumed fertiliser. The new investment framework, which assumes significance as it will encourage new investments in the sector, is an extension of the 2012 New Investment Policy (NIP) with revisions.

Mr. Vaishnaw said the urea demand is rising 5% annually and the policy approved aims to create additional urea capacity of 10 million tonnes.

Key changes compared with NIP 2012 include the separation of fixed and variable costs for greater transparency, the introduction of a viable return on equity (RoE) band with a floor at 12% and a ceiling at 16%, and mitigation of foreign exchange risk through conversion of fixed costs into the rupee after four years based on prevailing exchange rates.

“These measures are estimated to result in savings of over ₹250 crore for each plant established under NIPU-2026 compared with NIP-2012,” the Fertilizers Ministry said.

The minister said the country imports 10 million tons of urea to meet the domestic shortages. The annual domestic production is around 30 million tons against the requirement of 40 million tons.

The objective of the new policy is to become self-reliant in urea amid a rise in demand due to a change in cropping patterns, increased sowing area and record production.

“The incentive under the policy will be the same for private, government and cooperative projects,” Vaishnaw said.

Under the 2012 NIP, which expired in October 2019, six new urea units were set up, including four through joint venture firms of nominated public sector undertaking, and two units by private companies.

Export gains

India's trade weaknesses are becoming episodic, its strengths structural

India's trade data for June offers insights into how the country is weathering the West Asia crisis and the prospect of a deficient monsoon. The fact that the trade deficit jumped 430% in June would seem alarming. However, a deeper look at the composition of this deficit should ease a lot of that alarm. The bulk of the increase in the deficit was due to the sharp increase in merchandise imports in June. And within this, it was led by crude, gold, fertilizers and electronic goods. The value of crude oil imports rose 40% in June 2026, reflecting the skyrocketing prices of oil a few months earlier. Gold prices have also been rising as uncertainty over the West Asia situation persists. The doubling of gold import duties in May would also have pushed up prices in June. With India's natural gas supplies hit due to the West Asia constraints, it has had to import more fertilizer – 201% more by value over last June. The only one of these categories that has seen imports rise sharply due to domestic factors is the electronic goods segment. As India's electronics manufacturing and assembly grow, more parts are going to come from abroad to fuel this engine. The government is encouraging this, as seen in its decision last week to remove the basic customs duty on imported parts in the manufacture of display assemblies, lithium-ion cells and inductor coil modules. These are essential if India wants to boost its manufacturing of high-end electronics such as smartphones, laptops and smart TVs. Going ahead, the attempt should also be to manufacture as many of these inputs locally so that these supply chains can be made truly secure.

The good news is that India's merchandise exports have put on a strong showing, not only in June 2026, but throughout the first quarter of 2026-27. Merchandise exports grew 15.5% in June and by an even quicker 16% in Q1. This was not simply a buoyancy granted by costly petroleum exports, either. Non-petroleum exports grew by a robust 16.5% in June and 12.4% in Q1. This is almost precisely the duration of the West Asia crisis. The data show that India's exports to every region of the world except West Asia grew in Q1, and that a large portion of export growth was in volume terms as well as in value. Indian exporters are to be commended for diversifying so quickly. Service exports, however, grew only 2.9% in June and 6.2% in Q1. As Chief Economic Adviser V. Anantha Nageswaran has warned, success in areas such as Global Capability Centres should not be considered an end in itself – there is still far to go, and complacency will rob India of its advantage in this area.

• ECONOMY

India-UK FTA kicks in: What changes for consumers and industry

Ravi Dutta Mishra
New Delhi, July 15

AMID A fracturing world trade order, the India-UK free trade agreement (FTA) came into effect on Wednesday. The deal, negotiated over four years and marked by major political volatility in London, is India's first comprehensive deal with a developed country. The deal laid the framework for India's negotiations with the European Union.

With the deal, India's labour-intensive goods exports, such as textiles, footwear and gems and jewellery, could get a boost. Indian consumers can access British cars, scotch and chocolates at lower prices. India has reduced tariffs on around 90% of products and the UK has eliminated tariffs on 99% of Indian exports.

Changes for consumers

For the first time, India has given major concessions to imported cars and alcoholic beverages in an FTA, reducing tariffs for British cars from up to 110% to 30% in year one. The duty will go down to 10% by year five of the deal coming into effect. The annual

quota for British cars starts at 20,000 vehicles and peaks at 37,000 by year five.

India has also given major concessions to British alcoholic beverages by reducing tariff from 150% to 75% initially and then to 40% by year 10. According to Delhi-based think tank Global Trade Research Initiative (GTRI), this is a major concession as India is one of the world's largest and fastest-growing spirits markets and the UK is the world's largest whisky exporter.

Indian textile exports currently face tariffs of up to 10% in the UK. The trade deal could place India on a more level playing field with competitors such as Bangladesh, thereby boosting exports. India's gems & jewellery exports, along with footwear exports, will also get a boost as duty in the UK has been eliminated from up to 12% and 16% respectively.

Customs changes

For the first time in an FTA, India has allowed a system of self-declaration of origin by exporters or producers in the United Kingdom, replacing the conventional system of certificates issued by designated

More choices, lower prices

- Indian consumers can access British cars, scotch and chocolates at lower prices.
- Tariffs for British beauty and cosmetics and sports equipment have also been removed or reduced.

authorities, which often causes delays and hurdles. Experts said this could become the custom norm for exporters in developed countries such as the EU and US, making it comparatively easier for them to ship goods to India.

This customs change comes as India is also aiming to reduce its dependence on Chinese and Association of Southeast Asian Nations (ASEAN) exporters.

India's dependence on Chinese medical devices has been a concern. Now, New Delhi has removed up to 14% tariffs on the UK's medical devices, with phased tariff reductions for some sensitive items.

Quota on steel exports

Commerce Secretary Rajesh Agarwal at a press briefing said quotas allocated by the UK will ensure that India's iron and steel exports go up. A government official said India's iron and steel exports will grow from around \$850 million to over \$1 billion.

The curbs on steel imports announced by the UK after the trade negotiations had become a major flash point before the deal came into effect.

Concessions for professionals

The Commerce and Industry Ministry said that the deal on social security contributions would benefit 75,000 Indian Professionals and around 900 firms by providing exemption from contribution to UK National Insurance for five years. It covers the most important element of avoiding double contribution, exempting employees of Indian companies in the UK from contributing to the UK system.

The challenges

A commerce and industry ministry official said the labour and environment chapter of the India-UK agreement is not binding. Experts said this is a big win for India, as western countries have strong labour and environment norms that tend to act as a non-tariff barrier for exports from developing nations. However, India did not get an exemption from the UK's proposed Carbon Border Adjustment Mechanism (a pricing framework to ensure imported carbon-intensive goods face a carbon cost comparable to domestic products), which come into effect from January 1 next year.