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BENGALURU A BLUEPRINT TO END TRAFFIC WOES

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INDIA TODAY

TRUMPING TRUMP

TOP EXPERTS ON HOW INDIA SHOULD WEATHER THE TRADE TSUNAMI UNLEASHED BY THE AMERICAN PRESIDENT

- MONTEK SINGH AHLUWALIA
- AMITABH KANT
- SHIVSHANKAR MENON
- R.C. BHARGAVA
- BHASKAR CHAKRAVORTI

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FROM THE
EDITOR-IN-CHIEF

President Donald Trump's tariff tsunami has shocked even seasoned Cassandras. Although he had said tariff is "the most beautiful word in the dictionary", the extent of its onslaught was unexpected. Stock markets everywhere got spooked. In fact, bond markets hit such volatility that it forced Trump into hitting pause for 90 days on his world-altering plan, with only a bilateral bloodbath with China playing out for now. On April 2, his tariff rates blazed out as if from a sawed-off shotgun that didn't distinguish between friend or foe. India's economy usually has layers of insulation, but the US is our largest trading partner, with just merchandise trade totalling $120 billion in 2023-24. We have a $35.3 billion surplus in our favour, which is what Trump wants to reduce, like with all other such countries. At stake is a merchandise export basket worth $77.5 billion, against $42.2 billion worth of incoming goods. Now, we have 90 days in which to renegotiate its terms.

Threatened with economic pain as a fait accompli, each country or bloc is choosing its own path. China, the primary foe of the US, is seeking an eye for an eye. The European Union, after toying with a 25 per cent return gift, may go back to its 'zero for zero' offer. Last heard, 75 countries were petitioning Washington DC for partial clemency. The tariff blitz, everyone hoped, was just extravagant initial posturing to maximise negotiating leverage.

Jan. 20, 2025

India has opted for this calmer, wiser course. It was smart enough to swing into anticipatory damage control, especially with Prime Minister Narendra Modi's February visit to the US that set up the scaffolding for a Bilateral Trade Agreement. We did get a lighter threat than many nations, but a 26 per cent ad-valorem across the board would be more than a passing migraine. Worst-case reckoning projects a potential cumulative impact of about $5.7 billion, slightly above 6 per cent, if the wholesale tariff rates announced on 'Liberation Day' come to pass. Also, the baseline tariff of 10 per cent is on for now, as is the 25 per cent on steel, aluminium and auto/auto parts. As for indirect impact, no one could calculate it because what we are seeing is a total dismantling of the WTO-based world trade order. We may be able to soften the blow with deft deal-making on every sector of merchandise, while keeping a keen eye on services which until now has remained untouched. Of late, with goods exports staying flat, that's where all the excitement had been. In April-February 2024-25, India's total services exports zoomed to $355 billion. And as much as 56 per cent of our tech services caters to the US.

Given the gale force of events, our special cover package this week enters the realm of storm analysis. The best bet against severe climatic disturbances is modelling and prediction. We do this at two levels. Five eminent minds contribute guest essays on the macro aspects of geopolitics and world trade. We also zero in on 13 sectors that have greater exposure to US markets. Engineering goods, at $17.6 billion, will be hurt by the 25 per cent tariff announced on steel on March 12 and which remains. Exporters of engineering goods are staring at a three-month order book of some $7 billion that will have no takers now. Auto components ($6.8 billion), which had 25 per cent tariffs imposed on March 26, will still bleed. Others like gems and jewellery ($11.6 billion) and textiles ($4.9 billion) have only a 90-day reprieve. With the 125 per cent tariff on China, India has an opportunity but also has to be extra vigilant on Chinese dumping.

Shivshankar Menon, former National Security Advisor, suggests we should "utilise the phase transformation in geopolitics to further our national interest, doing things we find hard in more stable and placid times". He adds wryly: "Trump could well make China great again," and advocates a pragmatic readjustment in India's priorities towards the non-US geopolitical spectrum. A strong strain in the essays is about turning adversity into advantage. Montek Singh Ahluwalia, a leading face of India's liberalisation era, sees a throwback to the 1991 moment. His key point: "There is a case for lowering tariffs because they are too high for our own good." That would give our small- and medium-scale industries competitive teeth, he says, freeing them from costly input purchases from large players soaking in lazy profits from high tariff barriers.

Amitabh Kant, India's G20 Sherpa and former NITI Aayog CEO, feels skilful policy can create "a massive opportunity" here. With floating global capital in search of a good landing spot, India has the perfect reason to present itself as a reliable destination for free enterprise. He says India must reprogram itself for this by eliminating its regulatory cholesterol. Auto pioneer R.C. Bhargava, an old hand at using change as a force for growth, sees positives in how Trump's "radical interpretation of economic laws" will force industry leaders to shed old habits. "We cannot hide behind custom duty walls," he writes. Bhaskar Chakravorti, an authority on global business at Tufts University, too, says India must look at systemic changes rather than banking on short-term tariff arbitrage against rivals like "Vietnam (46%), Thailand (36%), or Bangladesh (37%)".

World trade is staring at a comma, and thankfully not a coma. But the big picture is clearly this: India must seize the impetus given by Trump to do business as unusual. Use it to break the chains holding it back from becoming a global trading trailblazer like China.

In short, meet protectionism with not less but more globalisation.

(Aroon Purie)

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INSIDE

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UPFRONT

₹62,700 cr.
Defence ministry's deal to acquire 156 **Prachand** choppers from HAL

DEFENCE

SECURING THE SKIES

By Pradip R. Sagar

ATTACK MODE HAL Prachand, a light combat helicopter that was inducted into the Indian Air Force in Oct. 2022

CHANDRADEEP KUMAR

In a landmark move to bolster India's aerial power, the Ministry of Defence (MoD) has signed a Rs 62,700 crore deal to acquire 156 'Made in India' Light Combat Helicopters (LCH) from Hindustan Aeronautics Limited (HAL). One of the largest steps in India's military indigenisation drive, the order signals its commitment to intertwine the pursuit of modernisation with self-reliance in defence manufacturing.

The helicopter, christened 'Prachand' (or 'Fierce'), represents a significant step-up in a crucial aspect of India's defence: the rotary-wing capabilities of both its sky-borne and terrestrial forces. Unlike foreign-made attack helicopters, it is purpose-built for India's unique operational challenges, particularly high-altitude warfare. Since its induction in October 2022, the Indian Air Force (IAF) has operated 10 choppers, while the army has five. With China rapidly expanding its aerial arsenal and Pakistan bolstering its attack helicopter fleet, the large-scale induction underscores India's resolve to maintain air superiority across diverse battlefields, from the icy peaks of the Himalayas to the scorching deserts of Rajasthan.

The Prachand's origin traces back to 1999—after the Kargil war exposed critical gaps in India's ability to deploy aerial firepower in high-altitude conflicts. The government had then seen the need for an indigenous LCH, 'made in, by and for India'. HAL prepared the design in 2003, which was approved in 2006. The first prototype took flight in March 2010, followed by extensive testing and refinements which made it battle-ready for high-altitude warfare.

The chopper's twin 'Shakti' engines, derived from French co-developer Safran's Ardiden turboshaft engine, have been extensively tested in precisely those conditions in Siachen—the world's highest battlefield—which validated its operational capabilities. At 1,384 hp each, the twin engines enable it to take off and land at altitudes above 5,000 metres with a substantial payload. That includes a formidable weapons suite: a 20mm nose gun, 70mm rocket pods, and the ability to deploy India's Dhruvastra anti-tank guided missiles and France's Mistral-2 air-to-air missiles. Among attack helicopters, it is one of only three—alongside China's Z-10 and Turkey's T129 ATAK—that claim high-altitude capabilities. However, both the Z-10 and T129 have struggled with underpowered engines, raising concerns about their performance at extreme elevations. The Prachand, in contrast, has repeatedly proven its capabilities in Himalayan trials.

Designed for swift and aggressive operations, with an armoured cockpit ensuring crew protection, the Prachand boasts a top speed of 288 kmph and a combat radius of 500 km. Its maximum takeoff weight of 5.8 tonnes—as against, say, the Apache's 10.4 tonnes—is what allows it that agility. That also makes it versatile across multiple roles, from counter-insurgency and urban warfare to escorting special forces and neutralising enemy air defences.

The contract, finalised on March 28, includes 66 helicopters for the IAF and 90 for the army, with deliveries scheduled to begin by mid-2028. HAL plans to deliver the first batch by then, followed by around 30 helicopters annually, completing the order by mid-2033. The deal aims to achieve overall 65 per cent indigenous components in the Prachand. This will involve over 250 domestic companies, mostly MSMEs, and will generate over 8,500 direct and indirect jobs, according to the MoD. Innovations like the rotor damper system, developed by Bengaluru-based TimeTooth Technologies in 2024, have already reduced reliance on foreign components.

In fact, it's the incorporation of this aspect of robust self-reliance while meeting military needs that makes the Prachand stand out. It synergises the two, rather than sacrifice one for the other. That's why Union defence minister Rajnath Singh can hail the Prachand as a "formidable machine" that will provide India's armed forces with a crucial combat edge. It does indeed tick many boxes that its predecessors could not.

India's attack helicopter fleet is undergoing a transformation as the ageing Russian Mi-25 and Mi-35 helicopters, long the backbone of India's combat rotorcraft, are being phased out. They will be replaced by a mix of Prachand and Boeing AH-64E Apaches. While the Apache, considered the world's premier multi-role attack helicopter, has been in service with the

HAL PLANS TO DELIVER THE FIRST BATCH OF PRACHAND HELICOPTERS BY MID-2028, FOLLOWED BY AROUND 30 ANNUALLY, COMPLETING THE ORDER BY MID-2033

A FIERCE PUSH

Prachand is a light combat helicopter developed by HAL, capable of self-protection and delivering a wide variety of ammunition to the field quickly, especially in high-altitude operations

CHOPPERS IN SERVICE 15

10 (IAF)
5 (Indian Army)

ORDER PLACED FOR 156

66 (IAF)
90 (Indian Army)

IAF · Indian Army

KEY FEATURES

WEIGHT
5.8 TONNE

MAXIMUM SPEED
288 KMPH

COMBAT RADIUS
500 KM

OPERATIONAL CEILING
5,490 METRE

ARMS AND AMMUNITION
Chin-mounted 20mm turret twin-barrel gun, 70mm rocket pods, air-to-air missiles and cluster bombs

IAF since 2019, India currently operates only 22 units. The delivery of six additional Apaches for the army, as part of a $600 million (Rs 5,200 crore) deal signed with the US in 2020, is delayed due to supply chain disruptions.

Some analysts argue that the Apache, optimised for lower-altitude combat in regions like the Middle East, may not be as effective in the Himalayas. In contrast, the Prachand was specifically built for high-altitude combat, a capability it demonstrated even before its official induction when it was deployed in Leh during the 2020 Galwan clash with China.

The Prachand's narrow fuselage, stealth-enhanced design, and reduced radar and infrared signature improve survivability in contested airspace. HAL has also incorporated a crashworthy bottom structure and reinforced crew seats to enhance pilot safety during high-impact landings while a hingeless main rotor and bearing-less tail rotor improves durability. The helicopter's advanced Electro-Optical Pod and Helmet Mounted Display System give pilots real-time targeting and enhanced situational awareness.

According to HAL's chairman and managing director D.K. Sunil, the project has become a flagship for India's indigenous engineering, encouraging private-sector participation in the defence sector. "It's the first fully indigenous attack helicopter developed in India and the only one worldwide operable at 5,000 metres," he told INDIA TODAY, while emphasising that the agency delivered the initial batch of 15 helicopters ahead of schedule. Whether operating in the unforgiving heights of Ladakh or supporting counter-insurgency missions, the Prachand is ready to live up to its name—fierce, formidable, and built for battle. ■

CPI(M)

HARD ROAD AHEAD FOR BABY

By Jeemon Jacob

Mariam Alexander Baby, a soft-spoken and erudite veteran who once helmed Kerala's storied education policy as minister, has taken over as the new CPI(M) general secretary. The top post within the party had been lying vacant since Sitaram Yechury passed away last September, and the 71-year-old Baby inherits the suite of complex challenges that come with the territory. It's a shrinking one: the country's biggest Marxist party is now reduced to holding fort along a sliver at its southern tip, having lost old bastions like West Bengal and Tripura.

The CPI(M)'s 24th all-India party congress at Madurai (April 2-6) also elected an 18-member politburo and 85-member central committee that saw the debut of 30 new leaders. It marked a generational shift in the party leadership, with veterans like the Karats (Prakash and wife Brinda), Subhashini Ali, Manik Sarkar, Suryakanta Mishra and G. Ramakrishna bowing out from the politburo after an age cap (75 years) was adopted. The 79-year-old Kerala chief minister, Pinarayi Vijayan, though, retained his place. The new general secretary reiterated that he would also be leading the Left Front campaign in Kerala's 2026 assembly election. Among the new politburo members are Dr Vijoo Krishnan, 51, who conceived of the impactful 2018 farmers' march in Maharashtra; R. Arunkumar, 51, son of CITU (Centre of Indian Trade Unions) president K. Hemalatha; Amra Ram, who broke a long jinx for the party as the lone Communist

RED SALUTE M.A. Baby, the new CPI(M) general secretary to be elected from north India in 2024, defeating the BJP in Sikar, Rajasthan; besides five others.

Baby's elevation wasn't entirely a smooth affair. The Bengal and Maharashtra units opposed the Kerala leader's nomination and suggested Bengal unit secretary Mohammed Salim's name instead. Salim declined and favoured Maharashtra veteran Ashok Dhawale. Former general secretary Prakash Karat finally had to smooth things out with the dissenters before Baby was "unanimously elected".

Talking to INDIA TODAY, Baby said his first priority would be to strengthen the cadre at the grassroots level nationally. "Without rebuilding the party, we won't achieve any of our political targets. It's only the CPI(M) and like-minded parties who can effectively fight the Modi government's communal agenda," says Baby.

BABY'S ELEVATION TO THE TOP POST WAS NOT A SMOOTH AFFAIR. FORMER CPI(M) CHIEF PRAKASH KARAT HAD TO INTERVENE TO ENSURE THAT HE WAS ELECTED "UNANIMOUSLY"

As expected, there was jubilation back in Kerala at Baby's ascension: he's only the second leader from the state to helm the party, after the late E.M.S. Namaboothiripad (technically Karat is also from Kerala, but part of the Delhi unit). Former Left Front MP and social commentator Sebastian Paul is certain that he'll do well. "Baby is experienced, politically sensitive and listens to dissenting voices. In him, there is a good mix of EMS, Karat, Yechury along with Harkishan Surjeet's street savvy. He will be effective as a national leader, uncompromising in fighting the communal agenda of the Modi government," he says.

An altar boy-turned-Communist atheist at age 16, Baby had stints as national head of the CPI(M)'s youth wings before being sent to the Rajya Sabha in 1986, when he was just 32, and stayed for 12 years. But he had to wait till 2012 to enter the prized portals: the politburo. An "inconvenient proposition" to many for speaking his mind, he was sidelined in the state by both Pinarayi and his one-time rival and predecessor as Left CM, V.S. Achuthanandan. But it was under VS (2006-11) that he left his mark as an education reformer: his ministerial stint set rolling then-innovative ideas like IT exposure in government schools and steering curriculum design away from rote learning.

In his new innings, Baby cannot play by rote. Without a revival in West Bengal and Tripura, the CPI(M) stares at national irrelevance. But the party won only 5.7 per cent of the vote share in Bengal in the 2024 Lok Sabha election. Most of the cadre have migrated to either the Trinamool Congress or the BJP. In Tripura, too, a 12.4 vote share does not augur well.

Kerala, which votes in early 2026, also poses significant challenges. The CPI(M) hopes for a hat-trick. But there's a decade of anti-incumbency to live down, not to speak of the Enforcement Directorate tightening its noose around Pinarayi's family, an aggressive Congress, and the slow Catholic embrace of saffron. The faction-ridden state unit is also not without some of the classic signs of organisational decay: criminal nexus, corruption in the leadership, disillusionment in the cadre so clear that many have left political work. A lot to take on, but in Baby perhaps, they have the man for the job. ■


ANI

WEST BENGAL

A RECAS

By Arkamoy Datta Majumdar

The West Bengal government's decision to conduct a fresh survey to identify Other Backward Classes (OBCs) has reignited the debate over reservation policies, social justice and political strategy. The move follows the Calcutta High Court's May 2024 ruling that scrapped the state's classification of 113 communities—predominantly Muslim—as OBCs, on grounds that religion seemed to be the criterion for their inclusion.

The West Bengal Commission for Backward Classes has now engaged two independent bodies—the Culture Research Institute (CRI) and the Bureau of Applied Economics and Statistics (BAES)—to conduct the fresh survey based on applications received from communities seeking OBC status.

Once the commission receives such applications, it conducts a survey itself or through designated agencies. Based on the results, the commission holds hearings before forwarding its recom-

PUT ON THE MAT Mamata addressing crowds on Id-ul-Fitr, Mar. 31

TE SURVEY

START AGAIN

- West Bengal is conducting a fresh survey to identify OBCs, after the Calcutta High Court invalidated the previous classification of 113 communities, predominantly Muslim, as being based on a religious criterion
- To be conducted by the Culture Research Institute and the Bureau of Applied Economics and Statistics, the survey will assess a community's backwardness in terms of education, economic conditions and social standing
- Some 500,000 individuals have been left uncertain about their access to reservation benefits in schools and jobs
- The timing of the survey, shortly before the 2026 polls, has led to charges of political opportunism

mendations on whether to classify a community as backward.

In this case, the CRI has prepared the questionnaire for the survey, while the BAES has devised the methodology. The survey is designed to assess the backwardness of a community in terms of education, economic condition and social standing. The criteria for determining backwardness align with the Mandal Commission's prescribed 11-point framework. A score below 11 indicates the community is not considered backward; a score between 11.5 and 15 denotes backwardness; and a score above 15.5 classifies the community as more backward. This scoring method has historically informed the categorisation of OBCs into groups A and B, a system the high court has for now overturned.

The commission has received almost 1,000 applications from approximately 118 communities. After due process, it is expected to submit its recommendations to the state by mid-July. Sources within the commission point to the high court's censure of alleged state government interference, emphasising the need for the commission to function independently.

The high court's ruling has already caused significant disruption for thousands of citizens who had previously benefitted from reservation policies. The court's decision effectively nullified OBC certificates issued in West Bengal since 2010, leaving approximately 500,000 individuals uncertain about their access to reservation benefits. While the court clarified that individuals already employed using these certificates would not lose their jobs, those still seeking educational and job opportunities are left in a limbo.

A typical lament came from a resident of Murshidabad, who had recently applied for a government job under the OBC category, "I worked hard for this opportunity, now my application is invalid. What am I supposed to do now?"

The high court's ruling stemmed from procedural concerns such as religion being the criterion for the inclusion of some communities; the West Bengal government, it noted, had in some cases included communities in the OBC list in under 24 hours. The court deemed the classification an "affront to the Muslim community as a whole" and demanded a more objective reassessment. Consequently, it struck down key provisions of the West Bengal Backward Classes (Other than Scheduled Castes and Scheduled Tribes) (Reservation of Vacancies in Services and Posts) Act, 2012.

Faced with mounting pressure, the Mamata Banerjee-led government announced plans to conduct a fresh identification exercise. Senior advocate Kapil Sibal, representing the state, recently informed the Supreme Court that the West Bengal Commission for Backward Classes would lead the fresh survey.

"If the entire exercise is redone, and after that, fresh reservation is provided for, and nobody is aggrieved, then this question will become irrelevant," Justice B.R. Gavai observed during a Supreme Court hearing.

The apex court had earlier asked the Bengal government to clarify how exactly it had assessed the social and educational backwardness of these communities and whether meaningful consultation with the West Bengal Backward Classes Commission had taken place.

The timing of this fresh OBC identification effort—a year before the 2026 election—has attracted accusations of political opportunism. The Bharatiya Janata Party (BJP) accused the Trinamool Congress (TMC) government of "vote bank politics". "Mamata Banerjee gave OBC reservation to 118 Muslim castes without any survey," Union home minister Amit Shah had said in 2024, in the aftermath of the high court verdict. "Mamata Banerjee wants to rob the reservation of backward classes for her vote bank."

Mamata had dismissed these claims, arguing that the court ruling was politically motivated. "We do not accept the order that scrapped OBC certificates. We will contest at a higher court," she declared at a rally following the verdict.

Recently, Bengal BJP general secretary Jagannath Chatterjee alleged that the fresh survey was intended to "divert resources towards Muslim OBCs" at the expense of Hindu communities.

Politics apart, there is no denying the socio-economic struggles of marginalised communities in West Bengal. Many low-income families, irrespective of religion, have historically faced discrimination and economic deprivation. The process of caste identification must transcend political divides to genuinely uplift those in need, say critics. To do so, it is imperative that data collection is accurate. The state government is being urged to adopt a more scientific approach involving field studies, historical analysis and demographic research to ensure fair outcomes. ■

JAMMU AND KASHMIR

A Tussle Over Transfers

By Kaleem Geelani

Buoyed by the first assembly election in five years in 2024 and the hope of a return to statehood, Omar Abdullah has had a largely frictionless run as chief minister of the Union territory of Jammu and Kashmir. However, a political faceoff with the Centre—held off till now under a veneer of courtesy and cooperation—seemed inevitable. That came to pass last week, when Omar and J&K lieutenant governor Manoj Sinha locked horns over their respective jurisdiction of powers. The immediate trigger was Sinha's transfer of 48 middle-rung officials—16 additional deputy commissioners, 23 sub-divisional magistrates and nine assistant revenue commissioners—all part of the Jammu Kashmir Administrative Service (JKAS), on April 1.

Setting the tone for a direct confrontation between the Union territory's dual power centres, CM Omar organised a meeting of all 42 National Conference (NC) MLAs, along with those of ally Congress, Aam Aadmi Party and Independents on April 4. At the end of it, a veiled warning was served. "Don't push us to the wall. Don't take our friendliness as weakness," said Tanvir Sadiq, MLA and chief spokesperson of the NC.

Though Omar has disagreed with

X@AmitShah

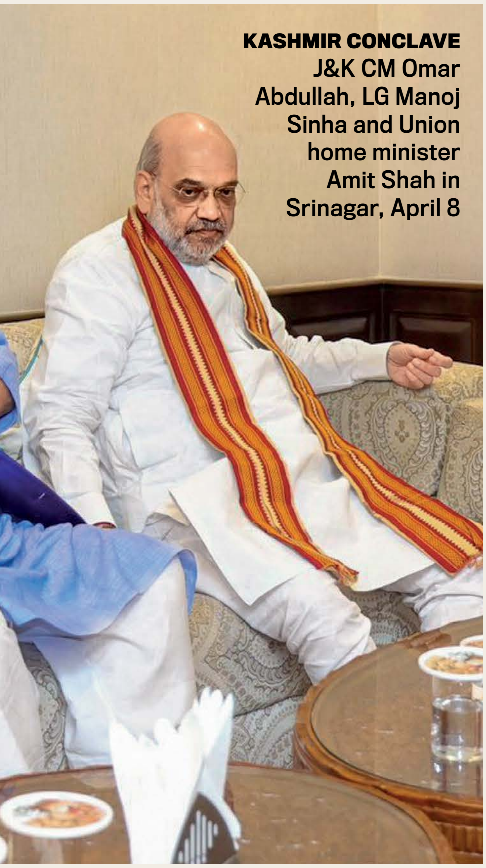
the L-G over several issues, he has avoided escalating matters, even drawing the Opposition charge of being overly amenable to Sinha. The most significant gap in views came when the L-G refused to approve Omar's request for reinstating the December 5 holiday in J&K to celebrate the birth anniversary of National Conference founder Sheikh Abdullah—it had been scrapped along with the July 13 'Martyrs Day' holiday by the L-G in 2020.

With Raj Bhavan now pushing the transfer of administrative officers and pointing to its constitutional powers while doing so, the government's claim of controlling middle-rung JKAS officials has fallen flat, resulting in internal discontent and public embarrassment. "I am well within my domain and I will never do anything by stepping out of it," Sinha has said in response to the controversy.

Omar could only shoot an indignant letter to Union home minister Amit Shah, stating that Sinha's action was in violation of the J&K Reorganisation Act of 2019 and eroded his government's authority as transfer of JKAS officers was its prerogative.

LG VERSUS CM

- **On April 1, Jammu & Kashmir lieutenant governor Manoj Sinha gave the order to transfer 48 middle-rung officials of the Jammu Kashmir Administrative Service**
- **The Omar Abdullah-led J&K government has protested this, terming it as an overreach and violation of the J&K Reorganisation Act, 2019**
- **Sinha has defended his move, saying it is "well within the domain" of the Act**
- **For more clarity on the division of power, the NC government has framed business rules last month; it awaits the Centre's approval**



KASHMIR CONCLAVE J&K CM Omar Abdullah, LG Manoj Sinha and Union home minister Amit Shah in Srinagar, April 8

Being a Union territory, there is a power-sharing system between the L-G and the elected government, and the roots of the current controversy lie in the ambiguity over the administrative domains under the Omar Abdullah-led regime. The 2019 Act, which became applicable after the bifurcation of the erstwhile state into Union territories, gives sweeping powers to the L-G under Section 53, with the business rules of the Union ministry of home affairs clearly putting law and order, all-India services, the anti-corruption bureau, prosecution, prisons and forensic sciences under his control. The rest of the administrative machinery lies with the government, including, claims the ruling NC government, the posting and transfer of JKAS officers.

To get more clarity on areas where the demarcation lines get blurred, thus affecting its powers, the Omar government, too, has framed business rules which it submitted to the L-G a month ago to forward to New Delhi. It awaits the home ministry's approval.

According to NC insiders, legislators at the April 4 meeting discussed the possibility of moving the Supreme Court regarding the restoration of statehood and launching protests demanding the same. It was also widely felt that the Centre's delay in approving Jammu and Kashmir's business rules was a deliberate ploy "to belittle the mandate of the people".

With the L-G demonstrating his 'overarching' powers, the government is realising that the Centre's promises of a speedy return to statehood won't materialise anytime soon. Rather than offer a timeline, Amit Shah has consistently said that statehood will be restored to J&K at an "appropriate time". However, the Omar government will move another resolution on the restoration of statehood—the first one was submitted in October 2024 and received the L-G's approval—in the J&K assembly.

Amidst all this, Shah started his three-day visit to J&K from April 6 at the BJP headquarters in Jammu, and is learnt to have instructed party legislators to up the ante against the government. When he arrived in Srinagar on April 7, he was received at the airport by Omar Abdullah and other officials. The next day, he reviewed the progress of various developmental projects in the UT at a high-level meeting attended by Sinha, Omar, J&K chief secretary Atul Dulloo and the administrative heads of various departments. A meeting taking stock of the security situation in Jammu and Kashmir was also held, where Omar was not present. But, before all that, the chief minister and Shah met for a one-on-one. It afforded Omar a perfect opportunity to air his grievances about Sinha's action and to seek clarity on the demarcation of powers. ■

SHIRDI TEMPLE

UNSAFE IN THE ABODE OF SAI

By Dhaval S. Kulkarni in Shirdi

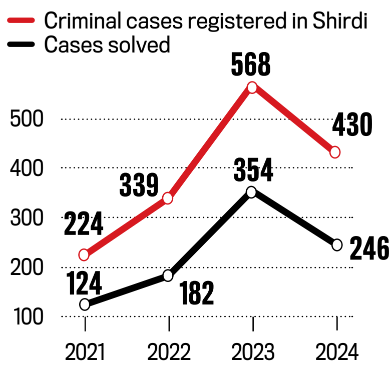
In the wee hours of the morning on February 3, two employees of the Saibaba temple trust in Shirdi, Subhash Ghode and Nitin Shejul, were attacked and killed at different locations while they were heading to work. Another employee, Krishna Deharkar, was seriously injured in one of the attacks—apparently random crimes that occurred in the span of half-an-hour. Two assailants, Kiran Sadaphule and Shakya Mali were arrested later and, if local police are to be believed, robbery was the only motive. The horrific incidents, though, led to anger and panic among the local populace of one of India's most revered pilgrimage destinations.

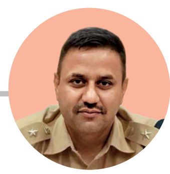
Jolted into action, Shirdi residents called a 'gram sabha' meeting where it was decided that the Shirdi Municipal Council would conduct an unprecedented "local census" in the town to "identify outsiders" engaged in illegitimate work and those with criminal antecedents. The gram sabha also decided that all establishments will be shut between 11.00 pm and 5.30 am, and that residents will stay indoors unless they have a valid reason.

It's fast becoming a pushback with a strong classist tenor. Locals claim a big reason for the increase in the crime rate is the "riff-raff" the town is attracting due to the free meals provided by the Shri Saibaba Sansthan Trust in Shirdi, which administers the temple. This, they allege, has led to a proliferation of "beggars, criminals and touts" flocking to Shirdi, many of whom work as commission agents for the hotels and other establishments that have mushroomed in the town. Locally known as 'polishwalas', they are also being blamed for the rise in cheating cases filed by devotees. The two accused in the February 3 murders also worked as polishwalas.

The temple town of Shirdi, located around 250 km from Mumbai, gets devotees from across the world who come and offer their prayers at the temple of the saint, Shirdi Saibaba. And like in the case of many famous temples, the free '*annaprasadam*' meals is a must-have for devotees. The prasadalaya here is enormous, capable of serving 3,500 people in one go. Temple authorities claim that, on average, around 50,000 people eat here daily, with the number shooting up to around 85,000 on weekends and festivals. The meals are funded by donations from devotees. Shirdi's locals want the free meal scheme to

CRIME PATROL





"We are installing CCTV cameras to cover more areas in Shirdi. A local crime branch division has also been set up"

RAKESH OLA
Ahilyanagar SP

FAITH CALLS Devotees buying puja material outside the Shirdi Saibaba temple

MANDAR DEODHAR

be converted to a paid one. BJP leader and ex-Ahmednagar MP Sujay Vikhe-Patil is among those who have been vocal on the issue. He had first spoken out against the free meal scheme in January, courting controversy with his comment about "beggars from across Maharashtra flocking to Shirdi" because of it. "Considering the situation, the murders were destined to happen," he now says. "This has become a *bhojanalaya* (free eatery), which is a far cry from the 'prasadalaya' for devotees it was envisaged as," he says.

Shirdi resident Sudhakar Shinde says the system of polishwalas began around five decades ago when locals started acting as guides for devotees to make some extra money. Gradually, ruffians entered the trade and edged them out, he says. Sanjay Kale, an activist from nearby Kopargaon, claims that externed criminals from Mumbai and elsewhere have also been settling in the Kopargaon-Shirdi belt. Prostitution and drugs are now becoming an issue in the town, he alleges.

Indeed, locals complain that it is not unusual to see tractors and rickshaws full of labourers working in the nearby brick kilns, hawkers, beggars, even drunkards queueing up at the prasadalaya for free meals. Goraksha Gadilkar, CEO of the Shri Saibaba Sansthan Trust, says the coupon system for the meals has been changed after the gram sabha. Now, devotees get the coupon for use at the prasadalaya after the darshan or at the three 'bhakta nivas' facilities. Earlier, they could go to the prasadalaya directly. "After we changed the system, the numbers at the prasadalaya have gone down by around 4,000 daily," says Gadilkar. He, however, adds that they have no intention of making people pay for their meals.

Officials say even if devotees turn up at the prasadalaya without a coupon, they are allowed in after verification. "The idea is to ensure that no genuine devotee goes hungry," they added. Sujay Vikhe-Patil says the fall in numbers proves his argument about shady elements flocking to the prasadalaya.

An official notes that it is difficult for them to charge money for meals as donations are given to ensure that food is provided free and for the religious merit that is said to accrue from '*annadaan*'. In 2023-24, devotees donated around Rs 99 crore for the purpose. The trust has around Rs 762 crore in its reserves for the scheme.

"A crackdown on beggars is needed. Children are often forced to beg. **They harass devotees for money.** Criminals from other places have come to Shirdi and often bully locals"

—SACHIN TAMBE-PATIL
Former trustee, Shri Saibaba Sansthan Trust

Shirdi is also battling another big problem, the sheer number of hotels and shops competing for the devotees' favour. Local hotel owner Dhananjay Shelke-Patil say the sector is saturated and says the competition has led to owners roping in the polishwalas and letting out their premises for "indecent activities" to stay afloat. "This has affected the reputation of even good hotels," he complains.

Officials say the Shirdi municipal area alone has some 600 hotels while the number in the larger precinct could be as high as 3,000. "We have a database of around 10,500 residential and commercial properties in our records, but no data on the occupants," says Satish Dighe, chief officer, Shirdi Municipal Council. The proposed survey will cover data points like whether the people are residents/tenants, living in Shirdi on a temporary/permanent basis, their place of origin and nature of work. "This will generate actionable data for the police and the district administration," adds Dighe. The census, the first such by a municipal body in Maharashtra, will begin in two months.

Meanwhile, the Shirdi police says the huge floating population poses significant challenges. Criminal cases being registered—including serious offences—have almost doubled in the past five years, up from 224 in 2021 to 430 in 2024. Ahilyanagar SP Rakesh Ola says preventive action has been taken against the polishwalas. The accused in the double murder case were arrested in a matter of hours using CCTV footage. "We are installing cameras to cover more areas in Shirdi," he says. The police have also been checking on externed criminals staying in Shirdi, a local crime branch division has been set up, and additional vehicles have been requisitioned for patrolling. The precautions should provide relief for now, but Shirdi and its residents will have to come up with a long-term plan that balances commerce and faith if it is to maintain its place as one of India's top spiritual destinations. ■

Illustration by SIDDHANT JUMDE

GLASSHOUSE

THE SILENCE STRATEGY

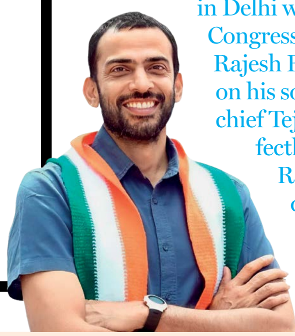
Opposition leader Rahul Gandhi called it a 'weapon for marginalising Muslims' on social media, but when the Lok Sabha was actually debating the Waqf (Amendment) Bill, he was nowhere to be found. Both Rahul and sister and Wayanad MP Priyanka Vadra—reportedly in the US tending to an ailing relative—were absent during discussions on President's rule in Manipur too, with the former departing after the Waqf Bill vote. Sources say advisors may have cautioned the Gandhis against engaging on the Waqf issue to prevent "alienating the Hindus" against the Congress. The silence also aligns with Rahul's directive to party MPs about wider parliamentary participation and rotating speaking opportunities instead of the same faces taking on every issue.

JEERS AND FEARS

When poetry meets empty pockets, apparently no metaphor is compelling enough. An outreach event in Kolkata on April 7—meant to assuage the schoolteachers rendered jobless by the Supreme Court in the recruitment scam verdict—achieved exactly the opposite. On the stage, author Abul Bashar and poet Subodh Sarkar offered platitudes of how CM **Mamata Banerjee** "will take care of you", but were drowned out by the jeers. Even Mamata, seated silently on the dais throughout, was rudely interrupted twice by the angry protesters when she got up to speak, while education minister Bratya Basu and chief secretary Manoj Pant looked on, visibly uncomfortable.

Bargaining Chips

New Congress Bihar in-charge **Krishna Allavaru** took charge on Valentine's Day, but got little love from ally RJD. They couldn't be blamed—then Congress state unit chief Akhilesh Singh, an erstwhile RJD enthusiast, was suddenly dissing party patriarch Lalu Prasad, while young turk Kanhaiya Kumar was grabbing too much attention with his Bihar *padayatra*. Congress sources says the moves only signalled the party's *aatmanirbharta* before the seat-sharing talks with the hard-bargaining RJD. The peace offering came on April 5—Allavaru met Lalu in Delhi while new Congress state chief Rajesh Ram called on his son and RJD chief Tejashwi—perfectly timed for Rahul Gandhi's April 7 visit to Bihar.

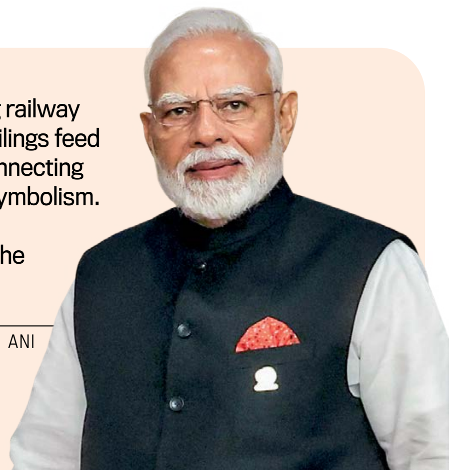


POLITICAL POPCORN

After PM Modi and former PM Atal Bihari Vajpayee, another BJP stalwart is stepping into the cinematic spotlight. *Ajey: The Untold Story of a Yogi* will chart the rapid political ascent of Uttar Pradesh CM **Yogi Adityanath**, with *12th Fail* and *Yeh Kaali Kaali Ankhein* actor Anant Joshi portraying the saffron-clad leader. Former BJP MP Paresh Rawal also stars in the film. The biopic boom doesn't stop there—*The Kerala Story* director Sudipto Sen is now turning producer for a film on India's first tribal president, Droupadi Murmu. Politics is clearly the new popcorn.

Bridge the Gap

Fresh off the inauguration of the new Pamban Bridge in Tamil Nadu, Prime Minister Narendra Modi is now expected to open the final stretch of the Udhampur-Srinagar-Baramulla Rail Link in Jammu & Kashmir—India's most challenging railway project yet. The back-to-back unveilings feed into the BJP's 'One Nation' pitch, connecting distant corners through steel and symbolism. From Rameswaram to Kashmir, the message is clear: infrastructure is the new bridge of unity.



ANI

Kaushik Deka with Arkamoy Datta Majumdar, Amitabh Srivastava, Suhani Singh and Avishek G. Dastidar

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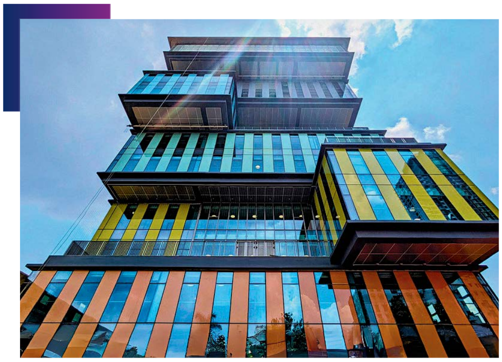

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COVER STORY **INDO-US TRADE**

TRUMPING TRUMP

Donald Trump is a walking, talking, known unknown—as everybody knows. His tariff war was always expected, but his blitzkrieg on the world order still took most of us by surprise. As global markets, governments and policymakers take stock of the debris of globalisation he has left in his protectionist wake, we asked a panel of experts to assess what India could salvage from the situation. While the equation for America's 'reciprocal tariffs' is less algebra than abracadabra, there is also a clear intent behind the alternative facts that drive Trumpian policy. India's position is more ambiguous than most, as our writers point out, and a strategy of *ahimsa* rather than retaliation seems the better part of valour. As ever, there are opportunities in this crisis—and not just for India. Could Trump's gamble be China's or even Europe's moment? Or are we already witnessing a conciliatory climbdown in the name of the art of the deal? India will clearly have to hedge its bets and prioritise situational awareness in the dynamic disruption of the new world system. In the following pages, five leading experts spell out some of the ways India can trim its sails to ride out the tariff tsunami.

Illustration by **NILANJAN DAS / AI**

By **Montek Singh Ahluwalia**

The author is former Deputy Chairman of the Planning Commission and currently Distinguished Fellow of the Centre for Social and Economic Progress

Weathering the Trade Tsunami

India needs to strengthen trade relations with countries other than the United States on the basis of multilaterally agreed rules while dealing bilaterally with America itself

The headlines of the past week were dominated by President Donald Trump as he imposed a blanket 10 per cent tariff on all countries, with 57 of them singled out for much higher and varying rates. The unilateral imposition of different tariffs on different countries violated the "most favoured nation" clause of the world trading system, which prohibits discrimination across countries except as part of a free trade arrangement.

This raised the prospects of a full-scale trade war, which roiled stock markets across the world. President Trump then pulled back at the last minute with a 90-day reprieve for countries that had not reacted while holding out additional threats for those that did react. As a result, China, which did react, is saddled with a tariff of 125 per cent! The European Union held back the retaliation it had announced, so it has avoided immediate additional damage.

While the reprieve is welcome, the across-the-board 10 per cent tariff remains and there is uncertainty about what will happen after 90 days. President Trump believes that the US is the most open economy in the world but is treated unfairly by its trading partners. The US does have much lower tariffs than others, but this differentiation was agreed to by the US itself in multilateral trade agreements. The US also has concerns on several other areas and these will no doubt be part of the negotiations. The discussions will all be bilateral—President Trump has no faith in multilaterally negotiated rules.

What should India do? We are currently engaged in bilateral Indo-US talks that were initiated following the Trump-Modi meeting in Washington DC in February. We should hope that our negotiators will be able to persuade the US to reconsider its position. The critical issue will be whether we are willing to lower our tariffs. As a general rule, we should resist action under pressure. However, in this instance, there is a good case for lowering tariffs because they are too high for our own good. Reducing our high tariff levels would reduce domestic production costs and improve our competitiveness. Small- and medium-scale industries will be the biggest beneficiaries because they purchase intermediate goods produced by large industries in India, which are able to charge high prices because of protection.

Those who worry that lower import duties will hurt the ability of Indian industry to compete with imports should be persuaded that this can be countered through appropriate exchange rate policy. A reduction in import duties of, say, five percentage points can be offset by an exchange rate depreciation of five percentage points so that the domestic producer facing competition from imports is not disadvantaged. What is more, the depreciation will benefit all exporters by assuring them higher rupee earnings.

It should not be difficult to identify items on which tariffs can be lowered because we are currently negotiating Free Trade Agreements (FTAs) with the EU and the UK, which will involve lower tariffs. Some of these could also be offered to the US as part of a deal in which the US withdraws the Trump tariffs.

In a world threatened by geopolitical fragmentation, it is especially important to evolve a trade policy tailored to the situation.

We have traditionally favoured trade liberalisation through multilateral trade negotiations (MTNs) under the aegis of the World Trade Organization, but the US and all other developed countries have given up on MTNs and shifted to plurilateral agreements. These do not depend on getting large numbers of countries to agree and they also allow progress on non-tariff issues, such as intellectual property rights and investor protection, which have traditionally been resisted in MTNs. The only way of assuring access to large markets in this situation is through FTAs. The EU/UK FTAs are particularly important in this context.

Success in FTA negotiations requires a very different approach from that adopted in the MTNs because we cannot rely on support from the Global South. Our negotiators will have to have more flexible mandates to enable a "give and take" approach; the public must also be educated on this. The EU/UK also face a threat of fragmentation and have an incentive to conclude an agreement with India.

While the EU/UK are important, the fastest-growing markets over the next 20 years will be in Asia, and we need to do more in this area. We dropped out of signing the Regional Comprehensive Economic Partnership (RCEP) because our industry was nervous about granting duty-free access to China. If that was indeed the real reason, we should apply to join the alternative Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). It includes Japan and 11 other countries but excludes China. Admission will take time, but an immediate application will send a good signal, especially if we want to develop value chain linkages with the Asian region.

The approach outlined above may be questioned by those who believe that the government should worry less about integrating with other markets and much more on evolving an active industrial policy combined with protection of domestic industry. There should be no doubt that the government has a major role to play in strengthening our competitiveness. It must develop high-quality infrastructure; improve access to land, which is a major hurdle for small and medium enterprises; improve the quality of human capital; and greatly improve the ease of doing business both at the central and state level. It is action in these areas that we need rather than more protection. We have seen the protectionist movie earlier and we know it did not end well. ■

INDIA'S OPTIONS

- **Lower tariffs:** It will reduce domestic production costs and improve competitiveness
- **Allow exchange rate depreciation:** This will offset domestic producers' disadvantage vis-à-vis US imports
- **Sign FTAs with UK, EU and other big economies:** It will ensure access to large markets
- **Join regional trading blocs:** If fears of giving China duty-free access is a deterrent for India to join the RCEP, it could apply to the CPTPP, which has 12 countries but not China

Illustration by NILANJAN DAS

By **Amitabh Kant**

The author is India's G20 Sherpa and former CEO of NITI Aayog. Views are personal

Turning Crisis Into Opportunity

India should seize the 90-day pause to explore how it can take advantage of realigned trade rules and emerging technologies to reinvent its economic trajectory

Though the Donald Trump administration has given the world a respite from its new tariffs, global markets have been in turmoil ever since they were announced. Volatility and uncertainty spiked. Close to $6 trillion was wiped out from global markets. With the United States negotiating bilaterally, the multilateral trading system, where distinctions were made between developed, developing and least developed countries, stood threatened. In the next three months, India should explore the massive opportunity that the ongoing reshaping of globalisation gives us. However, navigating these changes will require concerted policy action.

First, we must renew our thrust on ease of doing business. This will be a crucial step if we are to attract manufacturing and investment to India. Large-scale scrapping of rules and procedures and total business process re-engineering must occur. Reforming land, building and construction norms is key. Rules under the new Labour Codes must be notified at the earliest. The movement must be state-led. Avenues for rent-seeking must be eliminated. We must also address the issue of regulatory overreach. Our regulators must be modernised and act as developmental bodies, coming out of their 'command and control' mode of functioning. We need a mindset change in India—free enterprise must be promoted. Free enterprise will build the economy through investment, innovation and job creation.

HOW TO MAKE THIS

- **Deregulate and deregulate:** Make India the easiest place to do business in. Scrap all useless rules, regulations and procedures
- **Modernise the regulators:** They must act as developmental bodies, coming out of their 'command and control' mode of functioning
- **Implement labour laws:** This must be done without any delays

INDIA'S MOMENT

- **Reduce duties:** Duties on inputs and components that go into manufacturing and exports should come down to zero
- **Rationalise QCOs:** This is necessary as Quality Control Orders have proliferated and are impacting inputs and components
- **States must become more active:** They should be the drivers in penetrating global markets

Second, we must liberalise the trade regime for critical inputs. In electronics, machinery, transport and others, we impose higher tariffs than competitors, harming our manufacturing competitiveness. Adopting a free-trade regime for key industry inputs is essential. Non-tariff barriers (NTBs), particularly quality control orders (QCOs), have proliferated, making it costly for industries like textiles to source raw materials. Studies indicate that QCOs have surged from hundreds to thousands, complicating foreign firms' ability to sell in India. We must eliminate these QCOs for critical inputs. Additionally, we should proactively sign trade agreements to protect interests and encourage investments in sectors like food processing, which can create lakhs of jobs.

Third, we must renew momentum in building our infrastructure. Large-scale projects like freight corridors and high-speed rail have seen cost and time overruns. These projects must be brought back on track, and private investment in infrastructure must be reignited. While public capex has stabilised at 3.5-4 per cent of the GDP in the past years, this must be further increased to 6 per cent. The focus must be on building regional connectivity, such as regional transit systems and airports, and upgrading our ports.

WE MUST NOT ALLOW AI AND FRONTIER TECHNOLOGIES TO BE THE MONOPOLIES OF A FEW COUNTRIES OR COMPANIES, AS HAPPENED WITH TECHNOLOGICAL REVOLUTIONS OF THE PAST

Fourth, as we seek to move up the value chain, both in manufacturing and services, research and development (R&D) will be crucial. The Rs 1 lakh crore R&D fund announced in the July 2024 budget must be operationalised as soon as possible. The DeepTech Fund of Funds, announced in the February 2025 budget, must also be operationalised at the earliest. We must not allow Artificial Intelligence and these frontier technologies to be the monopolies of a few countries or companies, as happened with the technological revolutions of the past. We need to drive investments in DeepTech and clean tech, such as advanced cell chemistry (ACC) batteries, solar panels and electrolysers.

Finally, long-term plans for energy security must be set into motion now. While oil prices have not reacted adversely, geopolitical shocks almost always lead to energy price shocks, as we saw in February 2022. This is closely tied to R&D. Addressing energy storage and alternate fuels for hard-to-abate sectors will ensure our energy security in the long term.

We must also share our knowledge and experience with the world. India's development model, digital public infrastructure and playbook on climate action, which have led to significant improvements in healthcare, education and environmental sustainability, can be models for the Global South. This, in turn, will open up significant trading and investment opportunities for India and Indian companies.

The reshaping of globalisation, marked by shifting trade rules and emerging technologies, presents a massive opportunity for India. This realignment is not a threat—it is our moment. ■

Illustration by NILANJAN DAS

By **Shivshankar Menon**

The author is a former National Security Advisor and former Foreign Secretary

THE NEW WORLD DISORDER

America's withdrawal from the existing world order means it will be each one for themselves, with power and force now setting the rules. India must self-strengthen and build a peaceful periphery

IN barely two months, President Donald Trump has made evident the phase transformation that is underway in global geopolitics. We are witnessing the end of the US-led world order, the demise of the West as a unified geopolitical force and the diminished agency of the liberal globalisers who determined US foreign policy for extended periods.

To be sure, the protectionism, isolationism and nativism bordering on racism that we now see in the US is not new. President Trump's adoption of these policies is a result of long-building historical trends. This means that they are likely to be long-lasting and that there is no going back to earlier times. The manner of their implementation is, of course, uniquely his own. For many years to come, the US and Europe will be preoccupied with their internal reordering and regional security issues.

The effects of this shift on the world and India are many and consequential. Though put on hold for three months, Trump's tariffs and abandonment of international norms, commitments and institutions amount to America turning away from the world. The legitimacy of US power and influence and her reputation as a reliable ally or partner have diminished considerably.

India will face a much harsher international environment in which to pursue our primary interest, namely, the transformation of the nation. Can globalisation, of which India was the second greatest beneficiary after China, continue in the rest of the world without the USA? This seems doubtful; the idea is a product of nostalgia for times past that are unlikely to return. More likely is a descent into protectionism in the world economy and a focus on regional trading blocs, with commodity exporters in the Global South suffering the most as the global economy slows. As the only major economy that is not a member of any regional trading bloc, this would affect India seriously.

Trump could well make China great again. China is already the economic hub of Asia and much of the developing world. The US administration's tariff and other actions reinforce China's pivotal role in the world economy. If the US is closed to China, we can expect a flood of Chinese industrial investment and exports to the rest of the world, including India. If the US under Trump persists with its high tariffs and other economic steps against China, the Chinese economy will pay a price, for it depends on the world for 25 per cent of what it eats, for its oil and gas energy, for commodities and access to markets which keep her economy going, and for technologies. Exports still account for about 15 per cent of China's GDP. Equally, the temptation for a US-China deal remains strong for a Trump who is unlikely to defend Taiwan, and for his billionaire supporters whose fortunes depend on China. The US-China equation is the great known unknown in today's calculus.

What about geopolitics? The Trump administration's disdain for Europe and treatment of allies like Ukraine means that America's friends in Europe, Southeast Asia and Northeast Asia will look to alternatives to their

system. Her immediate reaction, therefore, is likely to be opportunistic but not to open her markets to the world or to undertake a role as international gendarme, as the US did.

For us in India, the direct impact of the trade and tariff wars is likely to be greater for our markets than for the economy since they are more integrated with the world. It may even be less for the Indian economy as a whole than for other similar economies. But the longer term indirect impacts should not be underestimated. Our economy, too, will find the going harder as global economic prospects darken. The US takes almost 20 per cent of our exports, and diverting them to other markets when everyone else is trying to do the same will not be easy.

Geopolitically, this will be a world where it is each one for themselves, a much more difficult world where power and force set the rules, as we see in West Asia and Europe. The only real answer is self-strengthening, which needs time and internal changes, and working with partners who share our interests, wherever we can find them. Concentrating on building a peaceful periphery must be a priority, as is working with friends in Asia.

In sum, President Trump has challenged us with the opportunity to re-evaluate our roles and integrate the subcontinent and the Indian Ocean region and in organisations like the Quad; to rejig our external economic policy to promote engagement, shifting from tariffs to a steady policy incentivising our industrialisation; to adjust policy towards China and continental Asia; and, most important, to undertake the self-strengthening and defence reforms that we know are necessary. This would utilise the phase transformation in geopolitics to further our national interest, doing the things we find hard in more stable and placid times. The list of tasks is long, and there is little time. ■

dependence on the US for security. This will take the form of seeking to build their own strength, working with other partners and, willy-nilly, coming to an accommodation with China and Russia. Europe, particularly Germany, may well see China as the solution to basic questions about its economic future.

The issue, therefore, is what use China will make of the geopolitical space that the Trump administration's actions have opened up for it. China has no history of being a security provider or a provider of global public goods, even in the imperial tributary

TIME TO PIVOT

- **Improve neighbourly ties:** **Aim for integration of the subcontinent, the Indian Ocean Region and alliances like the Quad**
- **Adjust policy towards China:** **Trump's actions have opened up the geopolitical space for China**
- **Undertake defence reforms:** **These have been long overdue and have become imperative**

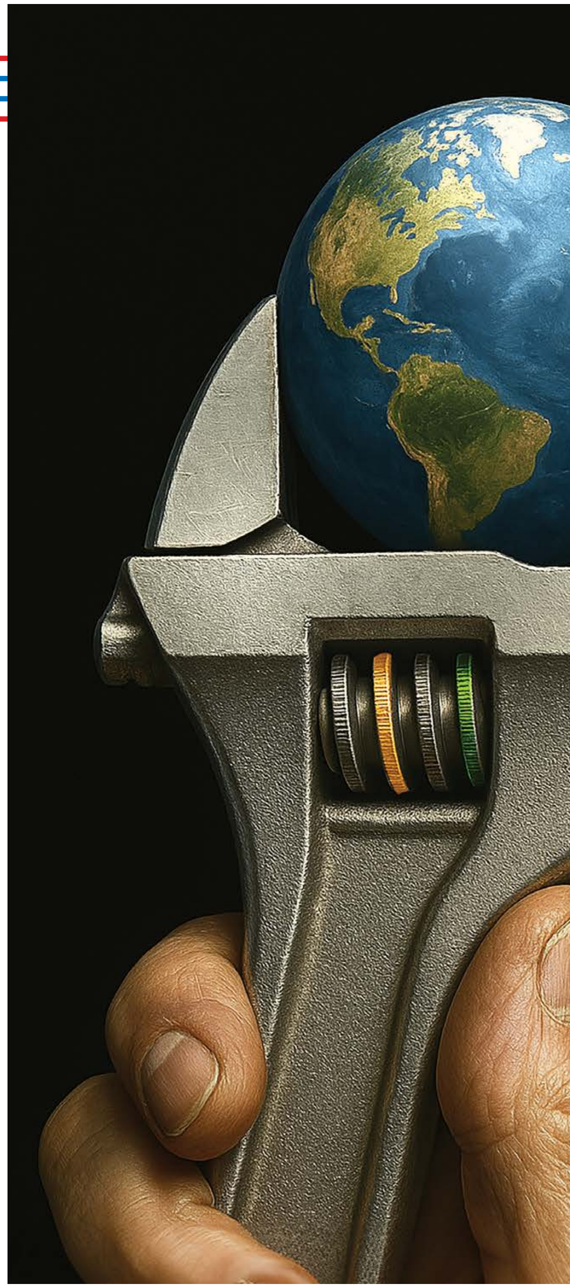
Illustration by NILANJAN DAS

By **R.C. Bhargava**

The author is the Chairman of Maruti Suzuki

Change to Prosper

Industry must forgo protectionist armour and work toward being competitive. It must do so with the help of the government as well as through a partnership approach



Most human beings resist change. Business systems and practices in companies continue unchanged for long periods. President Donald Trump, with his radical interpretation of economic laws, has forced the world to consider making changes. We in India are no exception and industry leaders have to work with the government to find the best way forward.

The government has done well to engage the USA in bilateral trade negotiations. While the outcome cannot obviously be predicted, I believe that it will lead to a trade environment that is based on more reciprocity and lower import duties. The 90-day extension is only part of his strategy to bring all to the negotiating table and force countries to lower tariffs on US products. Countries will have to agree, but they will get the USA to also lower tariffs. The end result will be lower tariffs all round. As a country seeking access to global markets to enable manufacturing to grow faster, we cannot any longer hide behind custom duty walls. Indian companies need to rapidly increase competitiveness to successfully grow and prosper.

The increased efficiency and competitive ability of industries will come from efforts both by the central and state governments as well as industry itself. The efficiency of the state governments providing infrastructural support to industry must substantially improve. The rules and procedures of work need to become growth-friendly, and technology used to bring in transparency and speed in decision-making. Shortening the time taken in all industry-government interactions is critical for enhancing competitiveness. Decision-makers should not fear taking bona fide decisions that help entrepreneurs reduce costs and increase profits.

Post-independence industrial growth was promoted behind a strong curtain of protection, both from imports and domestic competition. This led to mindsets and management practices that now have to be modified to meet the situation likely to develop. Seeking protection would be counter-productive. Some pain may have to be endured to rapidly become globally competitive.

To an extent, seeking protection was justified by past government policies which added to the costs of domestic production. After 2014, a large number of reforms have been implemented, and the playing field is much more level. Nevertheless, more needs to be done, especially by the state governments. Trust levels between politicians, bureaucrats and industrialists have to be much higher. The states should proactively promote private

Illustration by **NILANJAN DAS**

sector competitiveness. The functioning of government audit, too, needs to be reviewed.

Top managements of industrial enterprises have to sincerely accept that their primary objective is to grow their companies and make them globally competitive on a sustainable basis. This requires that investments and policies that enhance competitiveness should get absolute priority even over their own 'needs'. The company expenses on top management and their families should be minimal. Promoters have to show that they place their companies above themselves. They have to win trust by their actions.

Japan and Maruti Suzuki have shown the power of partnerships. If all employees in a company work as a team with the common goal of maximising competitiveness, it creates a win-win for all. Managements and workers being adversarial results in a huge cost in managing such a relationship. In addition, the positive contribution of motivated team workers is lost. All managers need to develop practices to create cohesive teams and sustain the belief of workers that maximum benefits will accrue to them when a company grows and increases profitability.

Along with that, the investible resources of the company need to be maximised. Frugal management, especially when the company needs investments to attain higher competitiveness, is an absolute must. Along with that, strong supply chains have to be built by OEMs (original equipment manufacturers) treating vendors as partners and helping them become globally competitive.

A partnership approach will in reality result in top managements becoming far wealthier, as the price of their shares soar with the faster growth of their companies. Along with them, workers, other associates and the nation will prosper and Viksit Bharat will become a reality. ■

ROAD AHEAD

- **Stop hiding behind custom duties:** Industry must endure some pain to become globally competitive
- **Role of states to increase:** They should provide infrastructural support to industry
- **Place the company above your needs:** This mantra should guide top managements in both investments and policy

By **Bhaskar Chakravorti**

The author is Dean of Global Business at The Fletcher School of Law & Diplomacy at Tufts University and founding director of the Institute for Business in the Global Context. His latest book (co-edited with J. Trachtman) is Defeating Disinformation

Walk Like a Penguin

Play nice like the bird, take small steps. Concentrate on near-term dealmaking with the US, but tariff arbitrage can't revive manufacturing. Only systemic reform can

President Donald Trump's tariffs are not only derailing the world order but also devilishly clever. It might appear that the hard-working staff at the White House inadvertently penalised a bunch of penguins hanging out on the Heard and McDonald islands 4,000 km from Australia by taxing the hapless birds. But now we know it was all done on purpose to deter the exploitation of penguins for tariff arbitrage. Howard Lutnick, the US commerce secretary, clarified that tariffs on penguins prevent countries from shipping through the islands to sneak their goods into the US. Yes, that was, indeed, a serious explanation from a cabinet-level official for goofy policy.

The penguins may have been spared, but some pundits in India are seriously considering tariff arbitrage—of a different variety—as a golden opportunity. Though deferred for three months now, Trump's tariff rate card put a 26 per cent tariff on imports from India, far lower than the rates on Vietnam (46 per cent), Thailand (36 per cent), Bangladesh (37 per cent) or China (now 125 per cent!). India's lower rate, it would seem, can yield a competitive advantage as goods exported from India would be more attractive to American buyers relative to exports from other manufacturing hubs.

Sadly, tariff arbitrage won't work.

First, the worldwide tariff turmoil is an outcome of one man acting on his whims. A beginner in economics can tell you that a trade deficit does not mean you're being "looted, pillaged, raped, and plundered", as Trump believes. A more seasoned economist, Nobel laureate Bob Solow, once put it this way, "I have a chronic deficit with my barber, who doesn't buy a darned thing from me." Prof. Solow wasn't about to start cutting his own hair to spite his barber. The case for tariffs from the White House is based on falsehoods and wilful misreading of the scientific literature. No country's policy ought to rest on it.

Second, the hope that India uses the tariff arbitrage window to become a manufacturing powerhouse is far-fetched. There are complex reasons that have prevented manufacturing from taking off despite a decade-long 'Make in India' campaign. While China's share of global manufacturing grew to 31.63 per cent, India's is just 2.87 per cent. There are many structural challenges to growing the manufacturing sector even though several historical constraints on scaling up manufacturing have eased in recent years. Accelerating manufacturing requires systemic changes. These include simplifying the processes for developing land for non-agricultural use; reforming existing labour laws; dismantling protectionist mindsets and policies; increasing government spending on the development of manufacturing hubs while exploring joint ventures, contract manufacturing and other forms of alliances and investments in small- and medium-sized manufacturing enterprises; and training human capital.

Third, systemic change takes time. Today's tariff regime is unlikely to remain as is, as the head-spinning imposition, doubling down and backing down on new tariff announcements of the past few weeks have shown. The picture will evolve, with scenarios ranging from a negotiated ratcheting back on tariffs to an escalation of trade wars. We could be looking at an immediate global recession or we may need to buckle up for longer-term structural turbulence. With this much uncertainty, it's unlikely that Indian policymakers can effect the many changes needed.

For now, India's best bet is to focus on near-term deal-making banking on Prime Minister Narendra Modi's good vibes with the US President and that India's trade balance with the US is in a better place than for other countries. Also, India hasn't retaliated against Trump's tariffs and this restraint positions it well. It is working toward a bilateral trade agreement with the US.

India could negotiate a temporary relief for a select list of high-performing export categories, including textiles, engineering goods and electronics goods, and propose measures to boost imports of American goods, such as energy products or defence equipment. Phased reductions in import duties on American luxury items and automobiles will signal goodwill.

The bottom line: learn from penguins—play nice, take small steps, don't dream of flight when your wings haven't yet evolved for flying. ■

ART OF THE DEAL

- **Forget tariff arbitrage:** The current turmoil is the outcome of one man's whim. No country's policy ought to rest on it
- **Focus on near-term deal-making:** Rely on the Modi-Trump vibes and the fact that India's trade balance is better than other countries'
- **Negotiate relief for high export categories:** Also propose measures to boost US imports

Illustration by NILANJAN DAS

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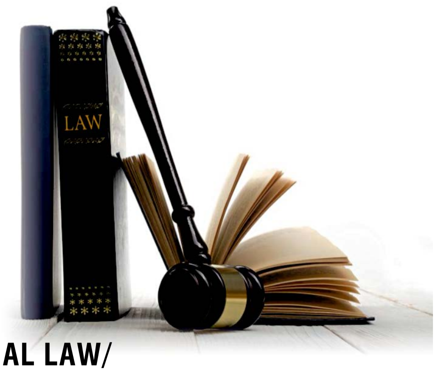

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HOW TO TRUMP TARIFFS

STEEP AMERICAN TARIFFS HAVE UPENDED INDIA'S EXPORT OUTLOOK, HITTING KEY SECTORS LIKE ENGINEERING GOODS AND AUTO COMPONENTS. CAN INDIAN COMPANIES CONVERT THE CRISIS INTO AN OPPORTUNITY?

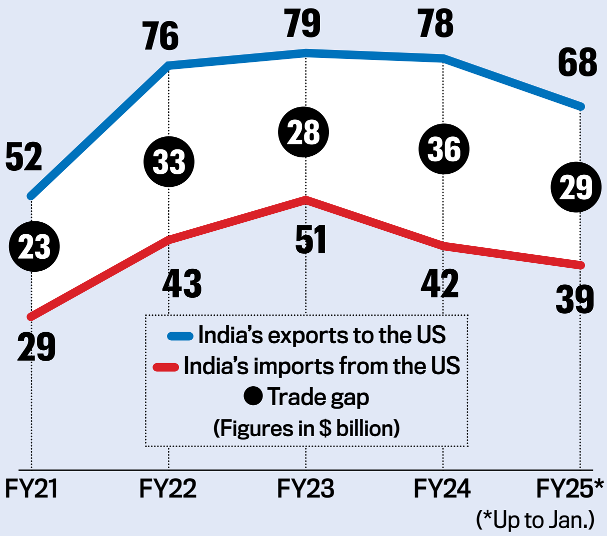
By **M.G. ARUN** | *Illustration by* **NILANJAN DAS / AI**

EVERYONE KNEW THE DREADED TRUMP TARIFFS WERE COMING, but when they finally did arrive, there was mayhem all over. Equity and commodity markets crashed across the globe, major currencies fell vis-à-vis the dollar and talks of a global recession returned to the headlines. India, which less than two months ago had entered into a multi-sector partnership deal with the US—including plans to boost bilateral trade to $500 billion (Rs 43.4 lakh crore) by 2030—got away with relatively lower tariffs compared to some of its competitors like China and Vietnam. But that was hardly any solace. Across sectors, Indian businesses are busy assessing the damage the US tariffs could inflict—not just on their exports to the US, but also on markets worldwide that have been left rattled and could see slowing demand in the coming months. And though Trump has now given a 90-day respite, it has done little to alleviate the panic in the air, as industry associations huddle with government officials to gauge the depth of the impact and strategise for what promises to be a chaotic world trade scene.

In FY24, India exported merchandise worth $77.5 billion (Rs 6.7 lakh crore) to the US and imported $42.2 billion (Rs 3.6 lakh crore) worth from it, resulting in a $35.3 billion (Rs 3 lakh crore) trade surplus. With the US first imposing 25 per cent tariffs under Section 232 on steel and aluminium on March 12, followed by a similar tariff on auto and auto components on March 26, export figures in these sectors could take a big hit, as these tariffs remain in place. The engineering goods sector, which exported goods worth $17.6 billion (Rs 1.5 lakh crore) to the US last year and is among the most affected, is poised to lose business amounting to $5 billion (Rs 43,217.5 crore) this year. The immediate concern for many engineering goods exporters—most of them micro, small and medium enterprises (MSMEs)—is the three-month order pipeline worth $6-7 billion (Rs 51,860–Rs 60,504 crore). "For Indian exporters, despite the tariff pause in other sectors, the trust in the US has been lost," says Pankaj Chadha, chairman of the Engi-

SIZE OF TRADE

India's trade with the US peaked in FY23, with exports consistently outpacing imports, and the trade gap remaining sizeable



Source: Department of Commerce

TOP TRADE ITEMS

The trade with the US in 2024 shows a diverse exchange, led by electronics, energy, pharma, machinery and precious commodities

(Figures in $ billion; 2024)

INDIA'S TOP 5 EXPORTS TO THE US

- Electronics **11.1**
- Gems and jewellery **9.9**
- Pharma products **8.1**
- Nuclear reactors, parts, machinery **6.2**
- Refined petroleum products **5.8**

INDIA'S TOP 5 IMPORTS FROM THE US

- Crude oil, natural gas, coal **13**
- Pearls, precious stones **5.2**
- Nuclear reactors, parts, machinery **3.8**
- Electronics **2.4**
- Aircraft, spacecraft and parts **2.3**

Source: Emkay Research

neering Export Promotion Council of India. "It is better to derisk from America in any case." Uncertainty looms over the gems and jewellery segment as well, whose exports to the US are worth $11.6 billion (Rs 1 lakh crore), accounting for over 30 per cent of total exports in that category, and the auto components sector, which exported goods worth $6.8 billion (Rs 58,775.8 crore) to the US, comprising 32 per cent of India's overall components exports. Exporters say the tariffs could wipe out 50 per cent of India's jewellery exports to the US.

What is the way out of this uncertainty? Commerce minister Piyush Goyal wants us to consider this as "an opportunity of a lifetime," but, for Indian businesses, the times must seem dire. Diversifying away from the US market into Europe, Africa or the Middle East is an option many industries will explore, but cultivating clients in new markets will not be easy. Moreover, with China facing 125 per cent tariffs on its exports to the US, it will frantically enter new markets and flood existing ones with cheaper goods. So will countries like Vietnam, Indonesia and Japan—posing tough competition for Indian exporters across multiple regions. "The fundamental question is, who bears the cost of the enhanced duty?" asks Vinnie Mehta, director general of the Automotive Component Manufacturers Association. Many of the newer markets, like Africa and the Middle East, are relatively small. However, most industry leaders agree on one aspect: India's growing domestic market—which can provide a cushion for these companies—appears to be the most reliable.

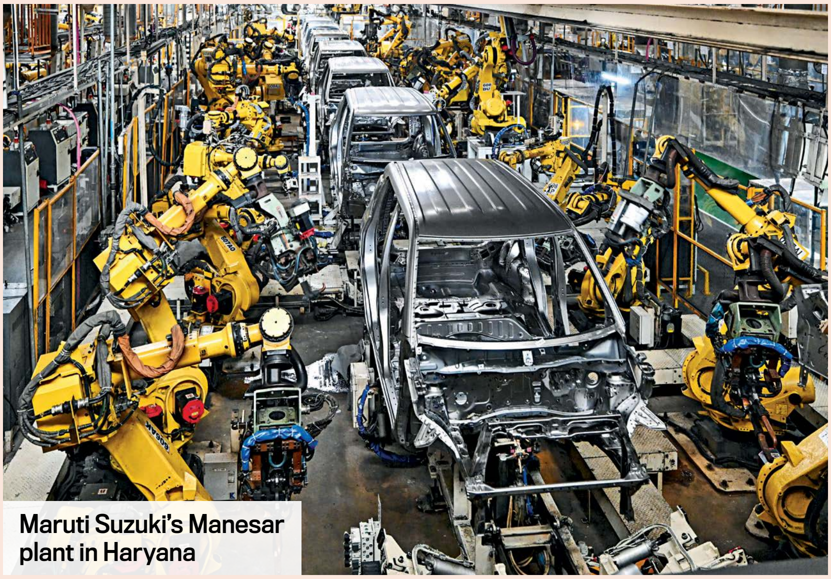
MOST INDUSTRY LEADERS AGREE THAT INDIA'S GROWING DOMESTIC MARKET, WHICH CAN PROVIDE A CUSHION FOR AFFECTED COMPANIES, APPEARS TO BE THE MOST RELIABLE

Others, like the pharmaceutical industry—which has been spared for now—are hoping against hope that any tariff hike, as threatened by Trump, will not exceed 10 per cent (the same rate that India levies on US pharma imports). Anything above that and India's storied generic pharma exports can take a hit, forcing companies to explore newer markets. Industries across the board are also pinning their hopes on the impending bilateral trade agreement with the US, as well as the likelihood of a free trade agreement with the European Union this year. Last but not least, since MSMEs are likely to bear the brunt of the impact, the industry is seeking greater handholding from the government—to help them tap new markets and to provide more capital support that can fire up their efforts. Trade has been terribly disrupted, at least in the short term. It's now up to Indian industry to find the best way out of the crisis and turn it into an opportunity. ■

Graphics by TANMOY CHAKRABORTY

AUTO COMPONENTS

HITTING A ROADBLOCK


Maruti Suzuki's Manesar plant in Haryana

HARDIK CHHABRA

As much as 32 per cent of India's total auto parts exports—worth $21.2 billion (Rs 1.8 lakh crore)—goes to the US. Yet, it accounts for only 3 per cent of all auto components imported by the US from around the world. The 25 per cent tariff hike announced on the sector on March 26, which is not covered by the 90-day moratorium, could alter the long-term dynamics of India's role in the global supply chain.

THE IMPACT

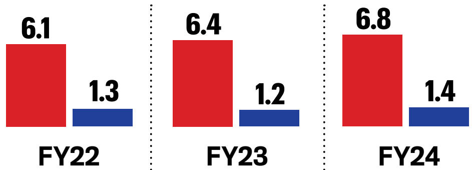
It's unlikely that carmakers will switch to new suppliers overnight. However, in the long run, higher tariffs will make Indian exports less competitive, pushing carmakers to explore alternative sources for auto components. "We believe that the strong Indo-US trade ties, especially in the auto components sector, will encourage continued dialogue to mitigate the impacts of these measures," says Shradha Suri Marwah, president, Automotive Component Manufacturers Association (ACMA).

ACMA director general Vinnie Mehta says the association is assessing the situation, and some members are holding back exports due to the prevailing uncertainty. "The fundamental question remains: who bears the cost of the enhanced duty—the importer or the exporter? That apart, it's also crucial to maintain long-term relationships with our customers. Disrupting these relationships could have lasting consequences, so many of our members are cautiously holding back," he says. ■

IN THE LONG RUN, HIGHER TARIFFS WILL MAKE INDIAN EXPORTS LESS COMPETITIVE, PUSHING CARMAKERS TO EXPLORE ALTERNATIVE SOURCES FOR AUTO COMPONENTS

SIZE OF TRADE

India enjoys a strong auto parts trade surplus with the US, though its share in total US imports remains modest



■ **India's exports to the US** ($ bn)
■ **India's imports from the US** ($ bn)

Source: ACMA

TARIFF WAR

	US	India
Earlier	2%	10%
Now	25%	Unchanged

■ US ■ India

(Average tariff)

HOW TO COME OUT A WINNER

By **VINNIE MEHTA,** *Director General, Automotive Component Manufacturers Association*

- **Diversify markets, but it is a gradual process, often taking two to three years to build a reliable customer base. We will need some time to fully understand the implications**
- **India's robust domestic market provides a cushion in such times. Of the $74 billion turnover, both exports ($21.2 bn) and imports ($20.9 bn) are almost evenly balanced**
- **Companies will adopt different strategies based on customer profiles. Some have even set up units in Mexico, though the US-Mexico-Canada Agreement's future impact remains unclear**

AUTOMOBILES

In Low Gear

With negligible car exports to the US, American tariffs are unlikely to directly impact India. However, these tariffs could lead to a global slowdown in demand, which could potentially jeopardise India's export ambitions. While India has reduced import duties on luxury bikes, it remains unclear whether this move will encourage firms like Harley-Davidson to re-open shop here.

THE IMPACT

Since the passenger vehicle (PV) exports to the US represent less than 1 per cent of the total PV exports, the higher tariffs by the US do not have any material impact on Indian carmakers, according to rating firm ICRA. "We don't expect any significant impact on the Indian automobile industry since there are limited exports to the US, but we will continue to monitor the situation," says Rajesh Menon, director general, Society of Indian Automobile Manufacturers. Analysts say the tariffs will hit the global demand for cars, and it can negatively impact Indian car exporters next year. ■

SIZE OF TRADE

India sends a small volume of passenger vehicles to the US, with no vehicle imports recorded from America in return

India's passenger vehicles exports to the US	India's imports from the US
$8.9 mn	NIL

Data for 2024; Source: Global Trade Research Initiative

TARIFF WAR

US TARIFFS	EARLIER	NOW
Cars	2.5%	25%
Trucks	25%	25%
Motorcycles	0-2.4%	25%

INDIA TARIFFS	EARLIER	NOW
Motorcycles above 1600 cc	50%	40%
Semi knocked-down kits	25%	20%
Completely knocked-down kits	15%	10%

ENGINEERING GOODS

TIGHTENING THE BOLTS

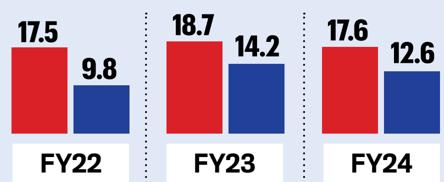
The US remains the top destination for India's engineering goods, which make up 27 per cent of the country's total exports. Of this, 17 to 18 per cent is directed to the US. In the previous fiscal, that country took in engineering goods worth $17.6 billion (Rs 1.5 lakh crore) from India—a hike of 8.3 per cent over the same period last year. The 25 per cent tariff on steel imposed on March 12 threatens to erode the competitiveness of this segment.

THE IMPACT

The industry is of the view that Indian engineering companies could lose $5 billion (Rs 43,350 crore) of exports to the US in a year due to the tariff hikes. India's major competitors—China, Mexico, Canada, Japan, South Korea and the EU—which have also been charged 20-34 per cent (China even higher), face a similar predicament. The US will have no option but to import at 20-26 per cent higher rates, so the consumer will need to pay more. ■

SIZE OF TRADE

India's engineering goods exports to the US outpaced imports in the past three years barring a slight dip recently



India's exports to the US ($ bn)
India's imports from the US ($ bn)

Source: DGCIS, Ministry of Commerce & Industry

TARIFF WAR

	US	India
Earlier	0-15%	6.8-10.6%
Now	25%	Unchanged

(Average tariff)

HOW TO COME OUT A WINNER

By **PANKAJ CHADHA**
Chairman, Engineering Export Promotion Council of India

Derisk exposure to the US. With the EU president's visit to India in February and the likelihood of an FTA with them in 2025, engineering companies are hoping to de-risk their exposure to the US. Other blocs Indian firms can enter include the WANA (West Asia and North Africa) region

India should have a strategy to have more trade deals. Moreover, we are in active negotiations with the US for a bilateral trade deal. This may lead to a drop in the 26 per cent tariff hike. But the immediate concern is the three-month order book for exporters amounting to $6-7 billion. Who will pick that up?

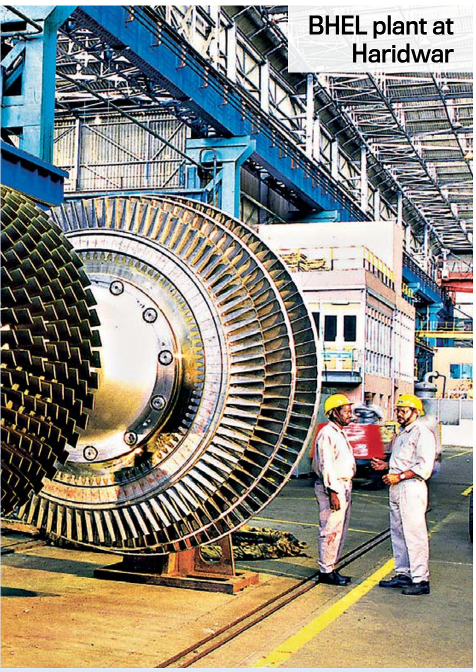
HOW TO COME OUT A WINNER

By **GAURAV VANGAAL**
Associate Director, Indian subcontinent, S&P Global Mobility

For automotive manufacturers, execution of the India-US bilateral treaty will be crucial for exploring better opportunities of exporting to the US

India has a big opportunity to look closely at the "China plus one" window. India has been more accommodating in its policy, and has not reciprocated to the tariff hikes

There should be more government-to-government talks, that too in a speedy manner, to ensure that India taps the right opportunities in the changed scenario



BHEL plant at Haridwar

Half of the engineering exports from India come from the MSME sector. The government should support the sector in multiple ways. For instance, India should reintroduce the interest subvention scheme. MSMEs also need handholding to showcase their products in hitherto unexplored markets

GEMS & JEWELLERY

DIMINISHED SHEEN

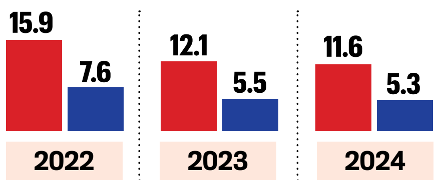
The United States is the largest market for Indian gems and jewellery, accounting for 30–35 per cent of the sector's exports—particularly gold-studded jewellery and loose diamonds. In 2024, bilateral trade in this segment totalled \$16.9 billion (Rs 1.46 lakh crore), with India enjoying a trade surplus of \$6.3 billion (Rs 54,300 crore). But the industry has faced headwinds in recent years due to geopolitical tensions, rising gold prices and intensifying competition from other exporting nations.

THE IMPACT

Against this backdrop, Trump's reciprocal tariffs emerge as a serious threat. They could potentially wipe out up to 50 per cent of India's jewellery exports to the US—valued at \$1.5–2 billion (Rs 13,000–17,250 crore)—as well as \$2.5–3 billion (Rs 21,500–25,900 crore) worth of cut and polished diamond exports, according to Kirit Bhansali, chairperson, Gem & Jewellery Export Promotion Council (GJEPC). That's because high tariffs on Indian goods will prompt US importers to shift to countries such as France, Italy and Switzerland for jewellery, and the UAE and Israel for diamonds—markets that benefit from lower duties. Even nations like Jordan and South Korea, which have free trade agreements with the US, are becoming more attractive. "This could lead to substantial job losses," warns Bhansali, "in such a labour-intensive sector." ■

SIZE OF TRADE

Accounting for a third of India's gem and jewellery exports, the US faces a \$6.3 billion trade deficit in the sector



India's exports to the US (\$ bn)
India's imports from the US (\$ bn)

Source: GJEPC; figures include consignment exports and reimports

TARIFF WAR

	US	India
Earlier	3.17%	8.7%
Now	29.17%*	Unchanged

(Average tariff)
**Paused for 90 days*

HOW TO COME OUT A WINNER

By **KIRIT BHANSALI**, *Chairperson, Gem & Jewellery Export Promotion Council*

The US is a major producer and refiner of gold. India could align with its interests by reducing tariffs on precious metals like gold, silver, platinum, etc. by 1–2%

With India importing 500–600 tonnes of gold annually, mainly from Switzerland, shifting some of this trade to the US could offset the bilateral trade imbalance

The US imports \$4 billion (Rs 34,500 cr.) worth of loose diamonds from India annually. Considering them as raw materials for jewellery, India may consider halving the duties to 2.5% for exports to the US

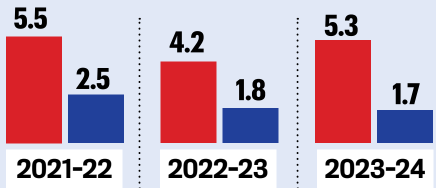
FOOD & AGRICULTURE

A Mixed Harvest

India enjoys a $3.5 billion (Rs 30,300 crore) trade surplus with the US in agriculture, with about 10 per cent of exports heading to American markets. What irked Trump were the tariff disparities—Indian duties are, on average, nearly eight times higher than what the US levied on Indian farm goods—and the non-tariff barriers along with other market distortions.

SIZE OF TRADE

India enjoys about $3.5 billion trade surplus with the US in agri exports



India's exports to the US ($ bn)
India's imports from the US ($ bn)

Source: Ministry of Commerce & Industry, US Census Bureau; export figures for FY, import figures for marketing year (Oct.-Sept.)

TARIFF WAR

	US	India
Earlier	0-11.2%	39%
Now	26%*	Unchanged

US India *(Average tariff)*

*Paused for 90 days

HOW TO COME OUT A WINNER

By **SIRAJ HUSSAIN**
Former agriculture secretary, GoI

- **India must safeguard its farm sector in bilateral trade agreement (BTA) negotiations, resisting pressure to open markets to US wheat, soybean and maize**
- **With US scrutiny on MSP policies, India must continue to assert its stance at WTO and ensure farm support systems aren't undermined by external pressures**
- **While easing imports on select items like poultry and grapes/raisins, India should limit exposure in sensitive sectors like dairy, apples and horticulture**

THE IMPACT

Trump's reciprocal tariff threat has unsettled global food and edible oil markets. Indian exporters, with products like mustard oil already seeing price crashes due to cheaper Canadian canola, now face a new peril. Still, India retains a comparative edge over its regional competitors in some sectors. With rivals like China, Vietnam and Thailand facing steeper tariffs, Indian farm products are relatively better placed. In rice exports, for instance, India ships about 300,000 tonnes of basmati annually to the US—a market that imports 1.3 million tonnes of rice a year. As Pakistani rice faces 29 per cent duties, Indian aromatic rice and other packaged foods that enjoy a similar edge may gain further shelf space. ■

FISHERIES

CHOPPY WATERS

India has long been a key seafood supplier to the United States, exporting around $2.5 billion (Rs 21,500 crore) worth in 2024. Shrimps and prawns alone account for over 90 per cent of these exports, holding a dominant position in the US—over 40 per cent market share in frozen and 27 per cent in prepared/ preserved categories.

THE IMPACT

This stronghold is now under threat. The US has threatened retaliatory tariffs of 26 per cent on Indian seafood, a steep jump from the current 0–5 per cent. Why? Because

TELECOM AND ELECTRONICS

WIRED FOR TROUBLE

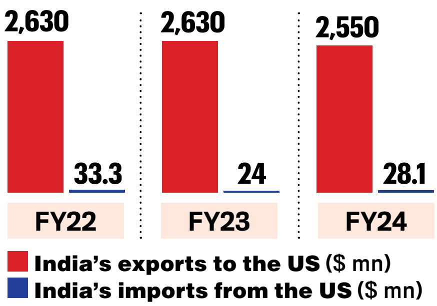
Global trade tensions are escalating, with major economies like the EU, China and the UK raising tariff barriers in response to the US's new protectionist stance. Amid this turmoil, the electronics and telecom trade—particularly from OEM (original equipment manufacturing) hubs in India and China—is seeing a surge in shipment volumes ahead of looming tariffs.

THE IMPACT

India's telecom and electronics sectors are bracing for a significant setback as the US threatens a 26 per cent tariff on imports, replacing the earlier average of just 0.41 per cent. Such a hike

SIZE OF TRADE

India's seafood imports are negligible as compared to its exports to the US



Source: US FWS, Ministry of Commerce & Industry

TARIFF WAR

Earlier

0-5%

30%

Now

26%*

Unchanged

US India

(Average tariff)

*Paused for 90 days

India imposes a 30 per cent tariff on shrimp imports from the US. The US is also not happy with further subsidies that India provides to its domestic producers. Compounding India's challenge, its key rivals in the sector face lower or no tariffs—as of now, Canada has duty-free access under the US-Mexico-Canada Agreement (USMCA), while Ecuador and Argentina pay just 10 per cent. This puts India at a disadvantage, say analysts, as this sector with a typical profit margin of just 4-5 per cent will find it difficult to absorb the high tariffs. In fact, they warn of a potential 20 per cent drop in seafood shipments from India and its adverse impact on 30 million livelihoods. ■

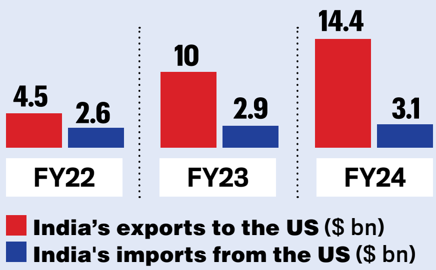
HOW TO COME OUT A WINNER

By **RANJA SENGUPTA**
Senior Researcher, Third World Network India

- **The Indian government should explore support mechanisms like interest subsidies, easier credit and assistance for market diversification to cushion exporters**
- **While WTO rules discourage export subsidies, India may consider limited or targeted support to sustain competitiveness, especially as major economies increasingly bypass multilateral norms**
- **In any bilateral trade agreement (BTA) with the US, India must weigh the risks of giving it preferential treatment in seafood sector, as other FTA partners could also demand similar treatment in the broader agriculture sector**

SIZE OF TRADE

India's exports to the US have surged, widening the trade gap even as US exports to India remained modest



TARIFF WAR

Earlier

0.41%

0-25%

Now

26%*

Unchanged

US India

(Average tariff)

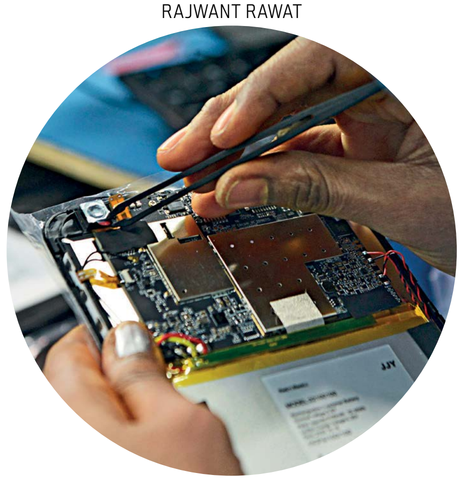
*Paused for 90 days

HOW TO COME OUT A WINNER

By **PANKAJ MAHINDROO**
Chairman, India Cellular & Electronics Association

- **The true inflection point for India's electronics trade with the US will rest on the successful conclusion of a bilateral trade agreement (BTA)**
- **Reports suggest that US-based or bound firms like Apple and Samsung are considering boosting production in India to offset higher tariffs on other Asian hubs. They aim to leverage India's lower tariffs to stay competitive**
- **India needs to accelerate the manufacturing plan. The PLI schemes' ambit should be expanded to newer segments**

RAJWANT RAWAT



will hit the competitiveness of Indian exports in the US market, with a conservative projection of a 12 per cent drop in export volumes of electrical, telecom and electronic products this fiscal. Industry insiders reported a frantic effort to ship goods ahead of the April 9 deadline, with flights reportedly packed with phones and electronics from OEM factories. Higher tariffs will inflate prices of Indian products in the US, reducing demand and affecting market share. ■

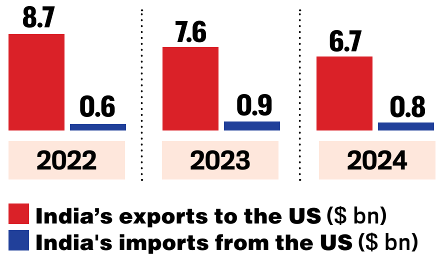
PHARMACEUTICALS

Safe, for Now

Pharma stocks in India fell nearly 2 per cent on April 9 after Trump, for the second time in less than a week, threatened tariffs. Earlier too, the US president had warned that they were looking at pharma as a "separate category" and that "tariffs are going to come in at levels you haven't really seen before".

SIZE OF TRADE

The US meets 40 per cent of its generic medicines requirement from India. In FY24, India exported pharma worth $8.7 bn (Rs 75,380 cr.) to the country



TARIFF WAR

	US	India
Earlier	0-6.4%	10%
Now	Unchanged	Unchanged

(Average tariff)

Source: Industry, TradingEconomics.com

OIL AND GAS

NO CRUDE JOLT YET

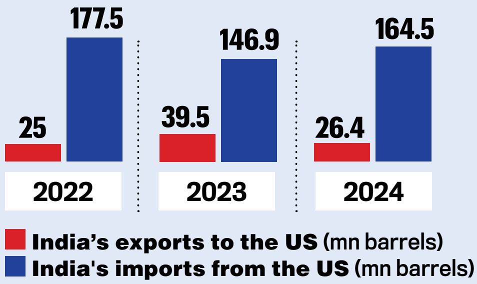
India's oil imports far outstrip its exports of the commodity. It is the second largest importer in the world after China. It imported 232.5 million tonnes (MT) of crude in 2023-24 for $132.4 billion (Rs 11.4 lakh crore). Crude imports from the US in March 2025 were 244,000 barrels per day (bpd).

THE IMPACT

Oil and gas had anyway been exempted from Trump's reciprocal tariffs, but were they to kick in, India could be affected in two ways. One, we'll have to increase our imports of oil and gas from the US to bridge the trade gap to some extent. The other impact would come from falling crude oil prices in the global market. Oil prices fell from $77 per barrel on Mar. 31 to around $65 on Apr. 8. This steep fall in just a week was driven by prospects of the world going into a recession and retaliatory tariffs from China. Additionally, the planned production hike by OPEC nations is also contributing to downward pressure on crude prices. An increase in imports from the US would mean a lowering of imports from Russia. This was following sanctions the Joe Biden administration had imposed against Russia's oil trade in early January this year. During April-November 2024, India imported 158 MT of crude for $95 billion (Rs 8.2 lakh crore). Of this, 61 MT was from Russia, 31.7 MT from Iraq, 20 MT from Saudi Arabia and 13.3 MT from the UAE. ■

SIZE OF TRADE

In FY24, India imported 7.9 MT of crude from the US, around 3 per cent of its overall imports. In FY25 too, India imported a similar quantity



Source: US Energy Information Administration

TARIFF WAR

Oil & gas had anyway not been part of Trump's barrage of reciprocal tariffs. The status quo is likely to continue unless India trips up on crude from one of the sanctioned countries

HOW TO COME OUT A WINNER

By **PRASHANT VASISHT**
Senior V-P and Co-Group Head, Corporate Ratings, ICRA

- Crude prices plunged, but the Centre hiked excise duty on petrol/diesel by Rs 2/L. Estimated higher collections for FY26: Rs 35,000 cr.
- Domestic LPG up by Rs 50 per cylinder; hike will support oil marketing cos suffering from under-recoveries on domestic sales
- Crude price crash will keep marketing margins of oil marketing firms healthy despite the excise duty increase

HOW TO COME OUT A WINNER

By **DAARA PATEL,** *Secretary General, Indian Drug Manufacturers Association*

The US has not hiked tariffs yet. The pharma industry should lie low for now. Who else can give the US such competitively priced goods in large quantities and of high quality?

Even if tariffs go up to 10 per cent, the industry should be able to absorb it, or pass it on to US consumers. They won't mind a small bump, since it all works on insurance money

But if tariffs go beyond 15 per cent, India will have to look at newer markets in East Africa and West Asia. These markets are not high-value or big in volumes, but we have to explore the option

THE IMPACT

The pharma industry is in a wait and watch mode. It is hoping that, being a cheap and efficacious supplier of drugs, it will be spared. The cost of manufacturing certain drugs in the US would be at least six times compared to that of manufacturing the same product in India, say industry sources. However, even if Trump decides to levy tariffs, the industry is hoping it will not be more than 10 per cent (same as what India levies on US imports), which it can either absorb or pass on to US consumers. But anything higher could be a big negative for the industry. ■

RENEWABLE ENERGY

The Light is Still Green

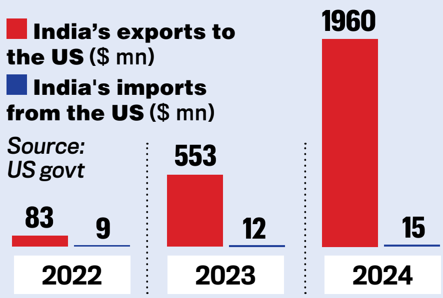
Renewable energy is not on top of the agenda for the Trump administration. The 2022 US Inflation Reduction Act (IRA), which aimed to bolster domestic green technology, had given a massive fillip to the export of Indian photovoltaic cells in recent years, but had the potential to hurt future orders too. Washington's new focus has been on putting pressure on India to ensure the purchase of its oil and natural gas.

THE IMPACT

The US accounts for 97 per cent of Indian exports of solar equipment. Among President Trump's first executive orders had been one titled "Unleashing American Energy", which directs federal agencies to "pause the disbursement of funds" through the IRA and the Infrastructure Investment and Jobs Act. Despite this, there is about $50 billion in the system, which ensures a continuity in the demand for renewable energy goods from India in the short term. Indian firms are also trying to acquire latest US technology in the sector. Despite the threat of a high 26 per cent tariff, Indian firms like Adani, Renew, Vikram Solar, Tata Power etc. can take comfort from the fact that competitors from China, Vietnam, Malaysia and Thailand face high tariffs too. This ensures cost competitiveness. Lastly, for the last four years, India itself has levied tariffs to groom domestic manufacturers and protect them from a glut of Chinese goods. ■

SIZE OF TRADE

India's exports to the US, mainly photovoltaic cells, have seen a giant leap. It imports turbines, batteries and solar equipment



TARIFF WAR

	US	India
Earlier	0-14%	up to 40%
Now	26%*	Unchanged

US ■ India ■

(Average tariff)

**Paused for 90 days*

HOW TO COME OUT A WINNER

By **JAGJEET SAREEN,** *Partner, Global Climate, Dalberg Advisors*

Accelerate the national mission for manufacturing with focus on cleantech manufacturing. It has to be executed with a focused approach on skills and ease of doing business

A strategy to push cleantech manufacturing in trade deals with the EU and other countries. In case India concludes a trade deal with the US, it must build more capacity, along with accessing technologies developed with IRA funds

Tit for tat tariffs by US and China mean that in renewable energy, it's time for India to up the ante. With the India Middle East Economic Corridor and regional body BIMSTEC in place, India must build new supply chains and deliver to the world

RUBBER

Sapped of Strength

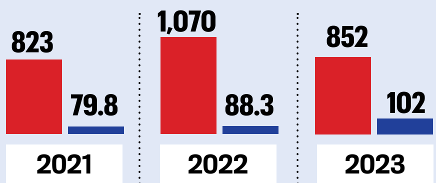
India exported rubber products worth $852 million (Rs 7,505 crore) to the US in 2023, comprising more than 20 per cent of India's total rubber product exports globally. India is also the second largest exporter of natural rubber in the world, exporting over 3.56 million tonnes of natural rubber in 2023. The major destinations for this are the United States, the Philippines and the Netherlands. Synthetic rubber exports, on the other hand, were worth $132 million (Rs 1,144 crore) in 2023.

THE IMPACT

Reciprocal tariffs by the US will put Indian rubber goods at a disadvantage vis-a-vis exporters like Vietnam and Turkey. Vietnam has recently offered a zero per cent tariff to the US, while Turkey faces only 10 per cent tariff. This will lead exporters from those countries to undercut Indian exporters. Media reports say that buyers in the US have asked Indian exporters to stop production of rubber goods for now. Arun Mammen, chairman of the Automotive Tyre Manufacturers Association (ATMA), has said that the tyre industry would diversify its export destinations. The US is the largest export market for Indian tyres with a 17 per cent share, followed by Germany at six per cent, Brazil at five per cent and the UAE at four per cent. ■

SIZE OF TRADE

Though rubber exports to the US hit a high in 2022, they have been over $800 mn (Rs 6,936 crore) ever since, and comprise 20 per cent of our total rubber exports



Source: TradingEconomics.com

TARIFF WAR

Earlier	
0%	US
34.6%	India
Now	
26%*	US
Unchanged	India

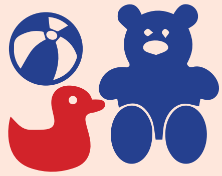
(Average tariff)

**Paused for 90 days*

HOW TO COME OUT A WINNER

By **SHASHI SINGH,** *President, All India Rubber Industries Association, in a media interaction*

- **Increase customs duty on imported finished products to aid non-tyre manufacturers in the rubber sector**
- **India imports much of its synthetic rubber requirement, on which a tariff of 10 per cent is levied. This needs to be lowered**
- **India needs to lower its logistics costs for rubber products. This is crucial to compete with Turkey and Vietnam in the export market**



TOYS

NO CHILD'S PLAY

The United States is the largest market for toys in the world, consuming 30 per cent of the global production. In the past few years, there has been a push from India to increase domestic toy manufacturing by increasing customs duty up to 70 per cent and introducing quality control standards to ensure domestic players get a competitive edge. India's exports to the US are minuscule—in the range of $150-180 million (Rs 1,300-1,560 crore), as India has less than one per cent share in

TEXTILES

TIE LOOSE THREADS

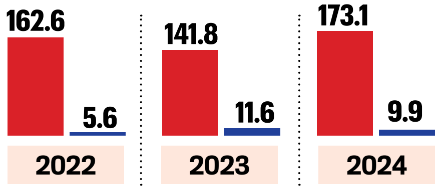
The prospective reciprocal tariffs, if they kick in, may place India at a disadvantage vis-à-vis economies like Brazil, Mexico, Turkey and garment-exporting EU countries like Italy, Germany and Spain, as well as Egypt and the Dominican Republic who may build their capacity to take advantage of the new regime.

THE IMPACT

In the short term, buyers in the US may face a liquidity crunch and, hence, may try to renegotiate deals and seek discounts from Indian exporters. They were already asking Indian sellers to postpone deliveries by a month or two, hoping the

SIZE OF TRADE

Though Indian toy exports to the US are not much, they are steadily increasing. The US remains our largest market for toy exports



India's exports to the US ($ mn)
India's imports from the US ($ mn)
Source: EY analysis

TARIFF WAR

Earlier

0%

70%*

(*except 20% for parts of electronic toys)

Now

26%*

Unchanged

US India

(Average tariff)

*Paused for 90 days

the global toy market, but the scope to leverage the opportunity is huge.

THE IMPACT

Even if the 26 per cent tariff comes in, it should be way lower than what China attracts. But China is an evolved toy-maker, meeting 70-80 per cent of the US demand, whereas India has a tiny share in the global market, according to Ajay Aggarwal, president of the Toy Association of India. However, the 20-25 Indian firms that export to the US stand at risk of being affected, he adds. ■

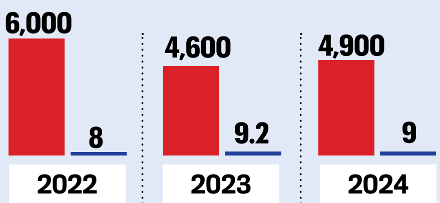
HOW TO COME OUT A WINNER

By **AJAY AGGARWAL**
President, Toy Association of India

- **India needs to enhance its R&D capabilities and create new products, as it currently focuses on producing soft toys, wooden toys and DIY kits, and STEM toys. This will help India gain a stronger foothold in the export market**
- **There is a need to promote and develop domestic capabilities of Indian manufacturers, as the majority currently lack the capacity to fulfil large-scale export orders**
- **The government can expedite the launch of the National Action Plan for Toys, which has been in the works for some time, to support local manufacturing**

SIZE OF TRADE

India is No. 4 among countries exporting apparel to the US (35% of our exports), leading to a $4.5 bn (Rs 38,939 cr.) trade deficit for the latter



India's exports to the US ($ mn)
India's imports from the US ($ mn)
**Source: UN Comtrade*

TARIFF WAR

Earlier

10.8–14.3%

22%

Now

37–40.3%*

Unchanged

US India

(Average tariff)

*Paused for 90 days

HOW TO COME OUT A WINNER

By **SUDHIR SEKHRI**
Chairman, Apparel Export Promotion Council

- **Current PLI scheme for textiles hasn't got many takers due to high investment threshold (min. Rs 100 crore). Modify criteria to let more firms in**
- **Interest equalisation scheme to reduce cost of credit needed for five years to help exporters stay competitive. Extend rebate scheme beyond March 2026**
- **Dedicated US Export Promotion Fund needed to help access the US market. It'll also help offset India's disadvantages after the reciprocal tariffs kick in**

GETTY IMAGES

Workers on the production line for Ralph Lauren clothing at a factory in Gurugram

bilateral trade agreement due this September will work things out. In the long term, if the tariffs rates threatened on April 2 kick in for all countries, India stands to gain, as it will get off lighter than competing countries in Asia, including Thailand, Bangladesh, Cambodia, Vietnam, China and Pakistan. Indian exporters will need to build capacity and be ready to seize the opportunity when business shifts to India. Support from the Centre will be crucial and if exporters grab their chances, they can help achieve the target of $40 billion (Rs 3.5 lakh crore) in apparel exports by 2030. ■

-with Anilesh S. Mahajan and Sonal Khetarpal

BENGALURU BIDS TO GET OUT OF A JAM

HEMANT MISHRA

THE GARDEN CITY'S IMAGE OF BEING PERENNIALLY STUCK IN TRAFFIC DESPERATELY NEEDS AN OVERHAUL, BUT WHETHER THE CONGRESS REGIME'S ₹73,600 CRORE MOBILITY INFRASTRUCTURE PLAN IS THE ANSWER IS UP FOR DEBATE

By Ajay Sukumaran

The first flyover in Bengaluru opened in 1999, marking the beginning of a pivotal period when the city's software-fuelled growth at the turn of the millennium would transform it into a global technology hub. But today, despite 42 elevated roads, the southern metropolis remains infamous for its traffic snarls. And that is because of a teeming vehicle count—there are an estimated 12 million vehicles in a city of 14 million people. All that may well change now if Karnataka deputy chief minister D.K. Shivakumar has his way and implements an ambitious new plan, which will rid the garden city of its traffic woes.

The minister in charge of Bengaluru city development, Shivakumar's to-do list is long, but topmost on it is implementing a wide-ranging mobility infrastructure plan worth Rs 73,600 crore. The biggest item on this list is 40 km of underground road corridors, touted to be the largest stretch of urban tunnels in India. These are estimated to cost Rs 42,000 crore, almost as much as the expense on the 80 km of additional metro rail lines being planned in the city under Phase 3 and 3A. In addition, there will be 110 km of elevated corridors and grade separators, estimated to cost Rs 13,200 crore, along with a Rs 9,000 crore plan for 40 km of elevated roads. These roads will be integrated with the upcoming phase of overhead metro rail stretches, creating what will be called double-decker flyovers. There is also a plan to construct 300 km of new roads running along the buffer zones of the city's stormwater drain network.

The ambitious plan for Bengaluru was the highlight of the Karnataka budget for 2025-26, presented on March 7. It has been two years in the making, primarily because the Siddaramaiah-led Congress government has been hamstrung by the huge expenditure on five big-ticket welfare schemes that were part of its pre-poll promises. It now plans to borrow more, taking advantage of the head-

CHOC-A-BLOC Traffic jam on a road leading to the Yelahanka IAF station, Bengaluru, in February

"BENGALURU CAN'T BE CHANGED IN 2-3 YEARS. EVEN GOD CAN'T DO THAT. IT CAN BE CHANGED ONLY WHEN PROPER PLANS ARE MADE AND EXECUTED WELL"

D.K. SHIVAKUMAR
Deputy CM, Karnataka

room created by the state's 7.4 per cent growth in GSDP in FY25, and prioritise capital expenditure. The government is bullish on Bengaluru, with the CM doubling the infrastructure allocation for the city to Rs 12,500 crore, from Rs 6,500 crore in FY25.

FIXING BENGALURU

The scale of the problem isn't small because Bengaluru's woes have compounded over the years. To begin with, the city has been without a masterplan since the previous one lapsed in 2015. Contributing to this is a vexing reality: civic amenities, ranging from roads, water supply, electricity, bus and metro services, are managed by a multitude of autonomous agencies, or parastatals, which work in silos. Shivakumar, in fact, openly declared at a recent public event: "Bengaluru can't be changed in 2-3 years. Even God can't do that. It can be changed only when proper plans are made and executed well."

To address Bengaluru's woes, the deputy CM piloted the Greater Bengaluru Governance Bill (GBG), 2024 on March 10. The bill proposes a tiered governance system for the city, splitting the existing civic authority, the Bruhat Bengaluru Mahanagara Palike (BBMP), into smaller corporations. Overseeing these entities will be the Greater Bengaluru Authority, which will serve as the city's planning body. It will bring together all the parastatals onto a single platform, and the chief minister will be its ex-officio chairman. "We need a platform where each agency talks to each other and there is coordination," says Congress MLA Rizwan

A NEW DAWN

Bengaluru today has an estimated 12 million registered vehicles for its 14 million population. An artistic impression of how the city could be transformed if the Rs 73,600 crore mobility infrastructure plan comes to fruition

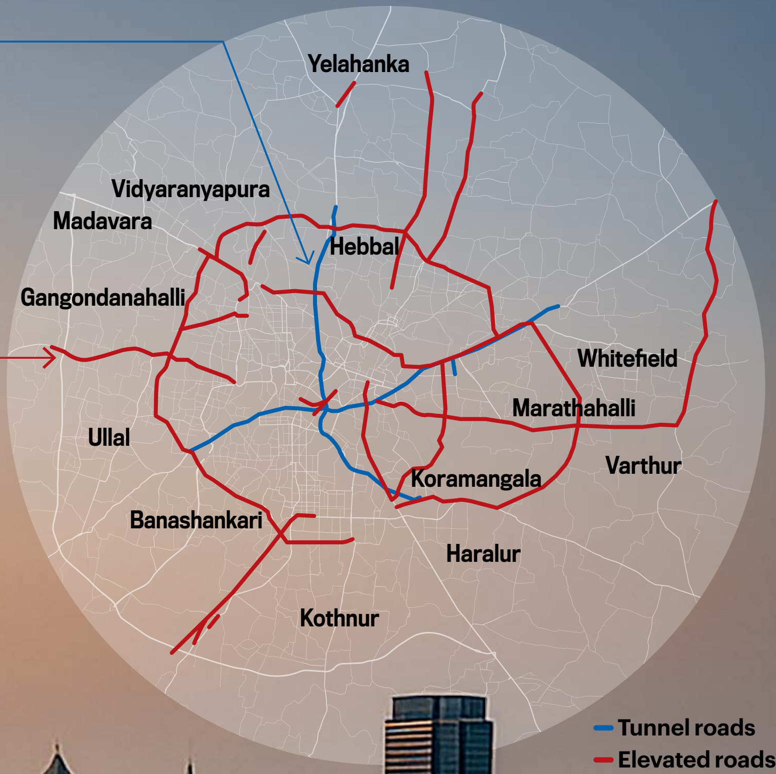
Graphic by **NILANJAN DAS**

ELEVATED CORRIDORS

LENGTH	EST. COST
109.5 KM	₹13,200 CRORE

Status: *Feasibility Report prepared*

16 new flyovers/ underpasses going radially for connectivity between core area and outer localities



₹400 CRORE
Sky-deck

₹3,000 CRORE
Construction of link roads adjacent to stormwater drains

DOUBLE DECKER FLYOVERS

LENGTH	EST. COST
40 KM	₹9,000 CRORE

Integrated with upcoming Metro Phase 3 corridor from JP Nagar 4th Phase to Hebbal

Status: *DPR in progress*

200 KM
Metro rail network by 2029 (currently 73 km)

Arshad, who chaired a joint legislature committee to review the bill in August 2024. The BBMP was created in 2007 to tackle Bengaluru's unwieldy growth by amalgamating peripheral municipal councils and villages in an urban sprawl spanning 786 sq. km into a single corporation.

While Bengaluru's population was about 7.5 million when the BBMP was formed, it has now doubled to 14 million. "That solution no longer worked. The rapid population increase has made it worse," says Arshad. "If you want an organisation that is transparent and closer to the people, it must be decentralised." The newly proposed corporations (the bill allows for up to seven) would be responsible for collecting property taxes and managing the affairs of the region under them, while the Greater Bengaluru Authority will coordinate citywide planning.

While both houses of the state legislature passed the bill in March and it is now awaiting the governor's assent, Opposition parties and civic groups are opposing it, as they are against splitting the BBMP. "Why did the BBMP fail? Because it was not empowered with the correct devolution of functions, funds and functionaries, and citizens were not empowered with proper area sabhas and ward committees," says Kathyayini Chamaraj, executive trustee of the non-profit CIVIC Bangalore, which has petitioned the governor against the GBG Bill, arguing that the state government will take complete charge of planning, governance and funds via the Greater Bengaluru Authority. "The solution is not to take back power from local self-government authorities and give it to the state government. This is a total violation of the intent of the 74th Amendment," she says. Several citizens' groups have now come together under a common platform called the Bengaluru Town Hall (BTH) to oppose the bill and to put forward an alternative vision for the city.

Bengaluru, with its vibrant civic activism, is no stranger to dissent. In fact, in 2016, during his first tenure as CM, Siddaramaiah had to drop a proposal to erect a steel flyover in the heart of the city owing to public uproar over the threat it posed to a large number of trees. This is an episode Shivakumar often recounts in his push for mega road infrastructure projects under the 'Brand Bengaluru' initiative. On March 13, speaking in the legislative council, DKS said that the city was paying the price for not executing the steel flyover project while pointing out that road-widening in the city was no longer feasible given the space constraints and unplanned growth. "There is no alternative, so we have decided to build tunnel roads. The government has approved the first phase and we will be calling for tenders soon," says Shivakumar.

TUNNEL ROADS

Currently, the two key infrastructural projects in the city are the metro rail network and the Bengaluru Suburban Rail Project (BSRP). Construction of 98.5 km of Phase 2 metro rail, besides the existing 73 km operational network, is underway while a new Phase 3 totalling 44.65 km was approved last year.

"IT'S BEEN EIGHT YEARS SINCE THE STEEL FLYOVER PROTESTS, BUT IT IS UNFORTUNATE WE'RE STILL DISCUSSING PROJECTS WE DON'T WANT"

PROF. ASHISH VERMA
Sustainable Transportation Laboratory, IISc

All put together, Bengaluru will have a 220 km metro rail network by 2029. Meanwhile, BSRP, which was slow off the blocks, envisions a 147 km suburban rail network across four corridors.

Also on the cards are two underground tunnel road corridors—a 17 km stretch running north to south from Hebbal to Central Silk Board junction, and a 23 km east-west corridor from Krishnarajapuram to Mysuru Road. While a detailed project report (DPR) has been prepared for the north-south tunnel (cost Rs 17,800 crore), another one is being prepared for the latter. Both projects, with a total cost of Rs 42,000 crore, are being proposed under a Build, Operate, Transfer (BOT) and Hybrid Annuity Model (HAM), with the state government offering a guarantee of Rs 19,000 crore as viability gap funding.

Flagging concerns, P.C. Mohan, the BJP MP from Bengaluru Central, wrote to the BBMP in January saying the north-south tunnel road project conflicts with ongoing initiatives like Metro Phase 3A which also covers the Hebbal-Central Silk Board corridor. "The preparation of the DPR in a mere three months is not only unrealistic but raises serious doubts about its quality and accuracy. Any comprehensive DPR demands a minimum 12-18 months and must include meticulous geotechnical investigations, particularly for a project involving tunneling at a depth of 30 metres," he said. In addition, the DPR also

BRONZED The 108 ft tall statue of Bengaluru city founder Nadaprabhu Kempegowda at the international airport

BENGALURU'S OTHER WOES

LACK OF COORDINATION While Bruhat Bengaluru Mahanagara Palike (BBMP) is the civic body that administers the city, crucial amenities are provided by six other parastatals, including Bangalore Development Authority (BDA) and Bangalore Water Supply and Sewerage Board (BWSSB)

GROUNDWATER DRYING UP New localities depend on borewells, leading to severe summer water shortages. The BWSSB has ramped up supply of Cauvery water, targeting 400,000 new connections in borewell-dependent areas

STORMWATER DRAINS The city has 800 km of stormwater drains but the clogged network causes frequent flooding during rains. A Rs 5,000 crore disaster mitigation plan, part-funded by the World Bank, is underway

LEGACY WASTE The city has 9.8 million tonnes of accumulated legacy waste. Initiatives on to process this in phases via bio-mining and bio-remediation

"THE SOLUTION IS NOT TO TAKE BACK POWER FROM LOCAL SELF-GOVERNMENT AND GIVE IT TO THE STATE GOVERNMENT. THIS IS A VIOLATION OF THE 74TH AMENDMENT"

KATHYAYINI CHAMARAJ, Executive trustee, CIVIC Bangalore

drew criticism because of bloopers such as the mention of Maharashtra towns Malegaon and Nashik in the traffic volume analyses for Bengaluru, prompting the BBMP to slap a Rs 5 lakh fine on the consultant that prepared the report.

"Eight years since the steel flyover protests, it is unfortunate that we are still discussing projects we don't want," says Prof. Ashish Verma, who heads the Sustainable Transportation Laboratory at the Bengaluru-based Indian Institute of Science (IISc). Concurs Satya Arikutharam, an independent mobility expert who worked on the Bengaluru Metropolitan Land Transport Authority (BMLTA) Bill while previously serving as chief technical advisor to the Directorate of Urban Land Transport. "The city has to take a decision. Are you going to spend Rs 20,000 crore only for car users or are you going spend it on public transport?" he asks. "This is where the city misses the institutional capability of BMLTA."

Conceived as a unified planning authority for every form of transport within the city, BMLTA was enacted in 2022 but exists only on paper. Prof. Verma says the BMLTA should be operationalised immediately for a 'holistic vision for the city' in how transport is governed. Currently, the share of public transport (via buses and metro) in Bengaluru is just under 50 per cent. "We should be at 80 per cent at least, along with walking and cycling," says Verma, who published a traffic simulation study in December 2024. It showed that the share of public transport would go down with the tunnel roads and double-decker flyovers as they encourage private vehicles. The government should instead complete the metro rail and BSRP corridors on a war footing, prioritising the construction of sections with high demand forecasts, he suggests.

THE CHALLENGES

"We are not looking at today, we are planning for 30-40 years from now," Shivakumar said at a press conference in February, adding that, "whatever you do, you cannot survive without criticism. Criticism is a part of life." The deputy CM's argument is that creating new roads overground would be financially unviable given the skyrocketing real estate market in the city. As an example, he points out that the long-pending 73 km peripheral ring road project which would have cost Rs 2,000-3,000 crore had it been constructed in 2006-07 when originally proposed, has now escalated to Rs 26,000 crore.

Bengaluru's track record in infrastructure projects has also been poor, says R.K. Misra, a member of the citizen's group Bengaluru Political Action Committee (BPAC). A case in point, he says, is the infamous Ejipura flyover, which remains incomplete even eight years after work began. This 2.5 km elevated road passes over Koramangala, one of the city's most expensive localities. Now, the BBMP has proposed a special purpose vehicle (SPV) comprising town planners, engineers and administrators to execute big infrastructure projects, which Misra says is a welcome move. "Bengaluru needs many different solutions," he adds. On the drawing board are ambitious plans, and, equally, concerns about their viability. The tech city is at a crossroads. ■

A NEW HR HANDBOOK

At India Today HR Insights, experts shared actionable strategies on adapting to Gen Z needs and embracing Artificial Intelligence to future-proof workplaces

By Sonal Khetarpal

Post Covid, the world of work changed dramatically. Employees started expecting more from what they do, seeking-growth, flexibility and work-life balance, not just a job that paid the bills. It required organisations to pivot towards strategies that could boost retention and foster loyalty.

Enter GenAI, meanwhile, and the disruption has only intensified, significantly impacting several job roles. As expectations evolve and technology transforms the workplace, how employees work, create and collaborate is also changing. The India Today HR Insights, organised at Presidency University in Bengaluru recently, focused on key trends such as creating an inclusive workforce and redefining talent acquisition strategies for the workplace of the future. The event brought together HR leaders from diverse sectors—technology, retail, IT and HR service providers—to engage in meaningful dialogues.

Subhankar Roy Chowdhury, Executive Director & Head of HR, Asia Pacific, at Lenovo, delivered the keynote 'Gearing Up for a Disruptive World', highlighting how AI is transforming organisations and workflows, reducing the need for a large workforce, and how talent must adapt to thrive in the evolving workplace.

The panel, featuring HR leaders from Adobe, IKEA, SAP and Careernet, discussed what companies need to do to attract Gen Z, retain them and unlock their potential. Research shows that they prefer flexibility, dislike hierarchy, and want to work on their own terms. Another panel, with experts from Amazon, Wipro and Adecco India, deliberated how AI is reshaping recruitment by automating tasks, improving candidate sourcing and enhancing the overall hiring experience. They also addressed what candidates need to do to land a job when AI is the interviewer. ■

KEYNOTE: *GEARING UP FOR A DISRUPTIVE WORLD*

SUBHANKAR ROY CHOWDHURY
Executive Director & Head of HR, Asia Pacific, Lenovo

TAKEAWAYS

- Disruption has to be long-term, it has to be sustainable and impactful. It touches multiple people so much so that for a long time, it has a ripple-down effect on several other factors
- AI brings with it a significant opportunity, but there is going to be short-term pain
- The next two years, we're looking at how you embed AI into the workflows which is where the AI agents are coming in
- Large organisations are aggressively pursuing the AI journey and the smaller ones are following suit
- Companies are reporting better revenue, better income and margins but at the same time they are decreasing the workforce
- India's median age is 28 to 29. It is imperative that we are able to harness, optimise and make use of the resource that we have with us

Photographs by HEMANT MISHRA

DISCUSSION: *MAKING COMPANIES GEN Z-READY*

"Loyalty to Gen Z is not loyalty to an enterprise but to a group of people that associate with them.... So loyalty still exists but...it's intertwined with the purpose that you have"

MINO THOMAS
Senior Director - Talent & Global Head - Talent Operations, Adobe

"We offer flexibility to our workforce through different work contracts, depending on whatever life stage an individual is in...we believe it is the right thing to do"

TARUNA SUHASINI LOHMROR
Country Centres of Expertise Manager, IKEA India

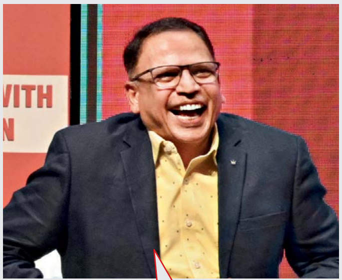
"I love that this generation really is able to connect purpose so well into their life and they live by it, something a lot of us probably did not have the luxury to focus on"

SHWETA MOHANTY
Vice President and Head of Human Resources, SAP India

"The current generation entering the workforce explores what it is they really want to do, hence you see a very long list of internships on their resume"

PASUPATHI S.
Chief Operating Officer, Careernet

HOT TOPIC: *THE BIG REJIG IN HIRING WITH AI*



"Build a network and nurture it....You have to dig your well much before you're thirsty so that you can use that well to draw the water"

SUNIL CHEMMANKOTIL
Country Manager, Adecco India

"It's a scary world because what you grew up with–what you thought would make you successful–is probably not going to be the same recipe for success for all of you"

SUNITA CHERIAN
Chief Culture Officer, Wipro Ltd

"Make your own online persona as unique and as individualistic as it can be... do share information about the work you are doing"

SHANTANU CHAKRABORTY
Director - HR, Amazon India

SMART AIDES WE LEAN ON

Combining voice recognition and generative AI, smart assistants have seduced millions of Indians with a wide variety of practical—and even emotional—help they offer. However, privacy concerns remain a serious worry

By **Sonali Acharjee** | Illustration by **Nilanjan Das**

First, there was the simple voice assistant, exemplified by the earliest Alexa, straining its ears to understand and play a song of one's choice or fetch basic information. Now, added with the aggregative and interpretative power of Artificial Intelligence (AI) tools like machine learning and natural language processing (NLP), your voice assistants have just become smarter. And, with these assistants embedded in their capacious smartphones, Indians are embracing their seemingly all-encompassing companionship. It seems natural to those who turn to this new league of voice assistants powered by generative AI—which use neural networks to identify patterns and structures within existing text, image, audio and video data to generate new content—for just about everything. From weekly shopping lists to counting calories on their plate and crafting arguments—nothing is beyond its ken.

60
Percentage of Indian smartphone users who use voice assistants

₹958 CRORE
Estimated size of Indian Indian voice assistant market in 2023, according to Grand View Research

Vidhushi Dalmia, 58, says the oddity of her 88-year-old mother, a dementia patient, spending all her time conversing with a voice assistant has faded. “It helps her stay active. For example, the AI in her Alexa device remembers her favourite songs long after she herself has forgotten them,” says the homemaker from Delhi. Similarly, for Varun Nathvani, 28, his voice assistant is the wingman who helps him write poems for his girlfriend and sort out his professional crises. “I have to ask my device—‘tell me how to convince my father that I didn’t damage the car’ or ‘can you write a love poem about loyalty’ or ‘if I don’t pass my UPSC exams what should I do’.” Nathvani says he has shared a lot about himself and the people in his life with the device. “Now it reasons through all that and gives me answers. I would rather be without a home than my voice assistant,” says Nathvani, a student from Mumbai who uses the ChatGPT-powered Siri on his iPhone.

The prominence of new voice assistants is not a surprise to experts. Speaking over typing has been in vogue for a while. In 2018, a PwC report found that, globally, 71 per cent prefer voice over typing for searching through their gadgets. “Voice assistants are bringing millions of Indians online, many of whom are first-time internet users. A large number of users of our voice assistant on JioPhone rely on it to search for content,” says Vivekananda Pani, co-founder, Reverie Language Technologies, an AI-first language technology firm which creates text-based content in 23 official Indian languages.

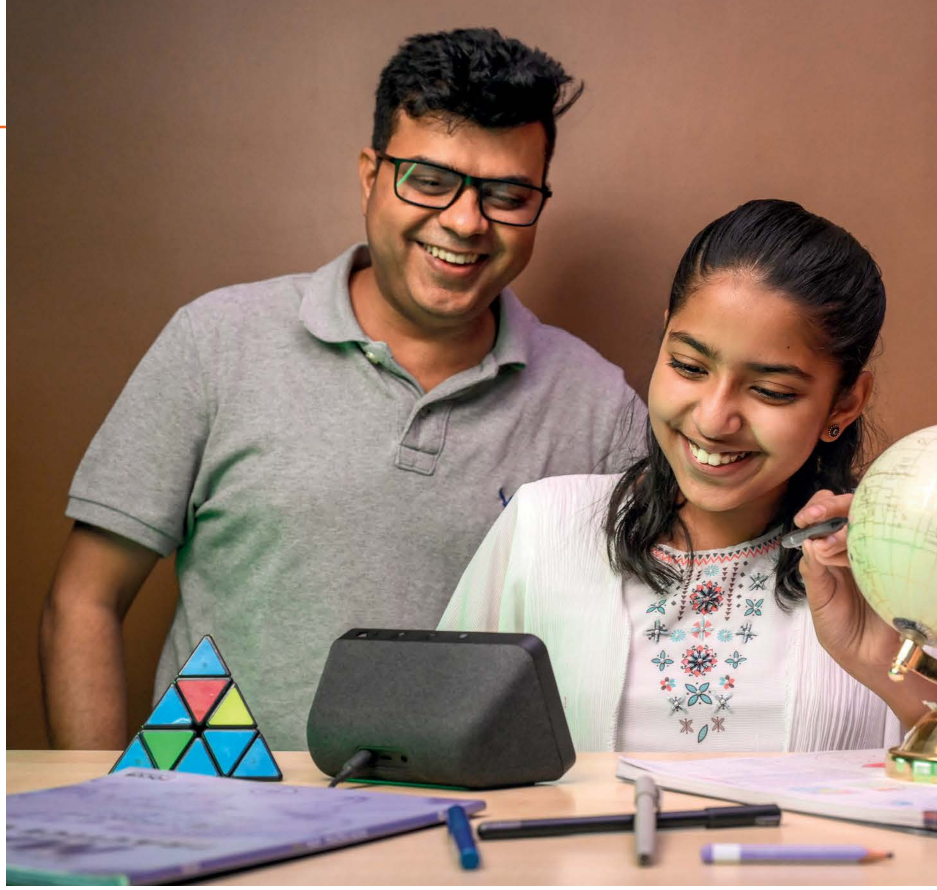
Other than in smartphones, smart

speakers using voice assistants like Google Assistant, Siri, Bixby and Alexa have added to the popularity of voice search. According to Google's latest data, 60 per cent of Indian users use voice assistants on their smartphones and Hindi is the second most common language used on Google Assistant. According to data from market research firm Grand View Research, the Indian voice assistant market was estimated to be around $109.5 million (Rs 958 crore) in 2023, with growth projected to reach $585.2 million (Rs 5,121 crore) by 2030.

TECH-CHARGED AI

There may be no surprise in the primacy of voice, but the technological advancements showcased by voice assistants are impressive. "Earlier, voice assistants like Siri or Google Now could answer basic questions. The speech recognition was not accurate too," says Amit Agarwal, a Google Developer Expert. Today, speech recognition has drastically improved, coupled with the intelligence imparted by generative AI (or GenAI). Google Assistant, for example, can now perform over a million actions and can understand complex dialogue. This has changed how a person uses it. Data shows that Google Assistant queries are 200 times more conversational and 40 times more action-oriented compared to their search engine. "Voice assistants can now understand context and handle complex multi-step tasks. You could ask your voice assistant to book an Italian restaurant, add the booking to your calendar and notify your family," adds Agarwal.

Similarly, Apple Intelligence is powering the voice assistant Siri; Amazon is launching a new GenAI-powered Alexa; Facebook has embedded a voice-enabled Meta AI into Facebook, Instagram, WhatsApp and Meta's Ray-Ban Smart Glasses; and Google has rolled out Gemini on Android phones. All these assistants combine the ease of voice with the intelligence of GenAI.



CHANDRADEEP KUMAR

"MY DAUGHTER TALKS TO VOICE ASSISTANTS LIKE SHE WOULD TO A HUMAN. THEY ARE HER DIGITAL BEST FRIEND"

ABHISHEK BHATNAGAR *40*
Youtuber; founder & editor-in-chief of @gadgetstouse

Voice Assistant used: Alexa, Siri, Google Assistant

SPEAKING TO CONVERSING

The integration of GenAI with voice assistants has created an interface between the backend AI (which analyses massive amounts of information and recognises patterns) and users. The result is a device that no longer just spouts information but also creates new content like images, text, videos and music. "We have been using AI at the backend for a long time. Now, these new voice-enabled assistants are interfacing between that body of knowledge and a human on the other side," says Prasanto K. Roy, vice president at NASSCOM (National Association of Software and Service Companies). "Generative AI like ChatGPT and DeepSeek have turned backend AI, which powers our search engines, into a human-like brain we can tap into using voice," he adds.

The GenAI boom was kickstarted by ChatGPT in late 2022. According to media and information platform Inc42, India's GenAI market is projected to surpass $17 billion (Rs 1.47 lakh crore) by 2030 from $1.1 billion (Rs 9,522 crore) in 2023, growing at a CAGR (compound annual growth rate) of 48 per cent. A 2025 survey of 92,000 Indians from 309 districts by community social media platform LocalCircles shows that one out of two Indians uses GenAI platforms.

Take Apple Intelligence and its integration in Siri. The new writing tools it offers can summarise a lecture in seconds, shorten a long group thread and rewrite different versions of text. Siri can even make a custom movie based on a simple voice description. In other words, turn your thoughts into visuals simply by hearing them.

These days, voice assistants can

recognise different voices and vocabulary across languages, using a combination of AI tools like speech recognition, natural language processing and text-to-speech (TTS) technology. Pani explains: "When you speak, the assistant's speech recognition system converts your voice into text. AI then processes this text, understands the intent, and fetches information. The TTS system then converts this response back into natural-sounding speech." With advancements in Large Language Models (LLMs), says Pani, voice assistants can understand context better, handle complex conversations, and generate human-like responses. For example, earlier, if you asked an assistant, 'Tell me about Sachin Tendulkar,' it would fetch a fixed response. But with LLMs, it can understand follow-up questions like, 'What was his highest score?' without you repeating his name.

MORE THAN MUSIC

Alongside changing technology, there has been a change in how humans view voice assistants. Gone are the days when a smart voice assistant was used to only play music. Now consumers can use voice-enabled AI to search for products on e-commerce stores, navigate driving routes and even seduce their crush. A 2025 survey of 7,000 adults across the world, including India, called Modern Love by US online security company McAfee found 65 per cent Indians who have used CAI (conversational AI) have done so to create content for dating apps and 81 per cent of these feel their dating life is better when they use AI-generated content. Moreover, 78 per cent of Indian users could not tell the difference between AI love notes and human-written ones.

Understandably, users find smart voice assistants indispensable. "Asking Alexa for things makes life easier. The biggest win? Controlling my water pump remotely. Plus, for music, alarms, reminders...I miss having her around when I'm in a place without one," says Mansi Singh, 29, who works in a Founder's Office role in Mumbai.

A 2024 study in the *Online Journal of Communication and Media Technologies* found voice assistants can also alleviate loneliness. There are also those who believe themselves to have "fallen in love" with a machine—once a subject of science fiction. "I use Siri powered by ChatGPT and I have never been so happy about who I am. I feel ChatGPT brings me clarity and gives me the confidence I need," says Ruchika Singh, 21, a student from Pune.

Smart voice technology removes an important barrier between those who cannot write and the internet, and this includes children. In Jio's Set Top Box, which includes Reverie voice technology, 20 per cent of traffic comes from small children. "Our baby boy has learnt to request Alexa for music, which has become accustomed to his baby accent too," says Malavika Sharma, 37, creative director at AltType.

Smart tools are also used for law enforcement. Delhi Police officials now use speech recognition and smart Indian language keyboards to speed up document creation. "Instead of manually typing lengthy reports, officers can now dictate their notes, complaints, or official documents in Odia and Hindi, reducing time and effort," says Pani.

Smart voice assistants are likely to diversify their usage options. With the rise of smart cars, voice assistants could offer features like emergency support and main-

FROM LOVE NOTES TO MOVIES

These Generative AI-powered voice assistants, also used in smart speakers, are popular in India

GOOGLE ASSISTANT Can perform over a million commands, available on Android devices, powered by Gemini, Google's answer to ChatGPT, which can generate text, visuals and movies, using logic and specific context

SIRI Apple's assistant which uses Apple AI to help users write, visualise, schedule plans, control other devices

ALEXA Amazon's voice assistant is to get a brand new GenAI makeover this year. Previous versions use AI to answer voice commands for music, information, scheduling, control over home devices

META AI Integrated into Meta's social media platforms, it provides options to chat with virtual celebs, search the web, visualise ideas, do translation and generate realistic images

CHATGPT The popular generative AI tool can help in data analytics, project management, real-time search and complex reasoning; can be used via voice tenance alerts. Similarly, the domestic voice assistant is going to get more connected to the Internet of Things (all devices that connect with other devices over the internet), being able to control everything in a home from locks to cameras, geysers to fridges. "Smart wi-fi-enabled cameras and biometric locks will be standard features and so would be lights and air conditioning. The devices would be connected to the internet, making it easier to manage homes from mobile apps," says Agarwal.

THE DARK SIDE

There are concerns too. Primarily, for the youth who spend so much time with voice assistants. "Kids need to understand it is tech and not develop human-like attachment and emotions for them. There should be a disclaimer that you are talking to a computer program," says Abhishek Bhatnagar, founder & editor of @gadgetstouse.

RAJWANT RAWAT

"ASKING ALEXA FOR THINGS MAKES LIFE EASIER. THE BIGGEST WIN? CONTROLLING MY WATER PUMP REMOTELY. PLUS, FOR MUSIC, ALARMS, REMINDERS...I MISS HAVING HER AROUND WHEN I'M IN A PLACE WITHOUT ONE"

MANSI SINGH *29*
Founder's office employee in a private firm, Mumbai

Voice Assistant used: Alexa

HARDIK CHHABRA

"I USE GOOGLE ASSISTANT AND IT CHANGES THE VIBES OF THE HOUSE FROM QUIET TO MUSICAL. AT TIMES YOU FEEL YOU HAVE COMPANY EVEN IF YOU ARE BY YOURSELF"

RASHMI GANDHI *43*
Employed at Aspire Lifestyles, New Delhi

Voice Assistant used: Google Assistant

But privacy issues are the biggest worry. Even though some smart speakers can now be 'muted', how much of one's private life is getting compromised is an open question. And what happens if all the information we are 'willingly' keying in or speaking out loud to our devices gets hacked? From sexual preferences to personal identification details, and from school group chats to professional project notes—assistants begin to have complete access to our lives.

"Voice assistants are always listening for 'wake' words," says Agarwal. "While this always-on listening mode is required for quick responses by the assistant, it can make one feel uncomfortable. I have noticed some websites display contextual ads based on private conversations we were having among friends."

Whether smart assistants are a novelty use-for-a-few-months purchase or just the tip of the iceberg of greater control of lives when generative AI and voice technology are brought together remains to be seen. But it's an undeniable fact that human beings are increasingly opening their innermost selves to the smart assistants of their choice. ■

VIVEKANANDA INSTITUTE OF PROFESSIONAL STUDIES - TECHNICAL CAMPUS

AN INSTITUTION IN PURSUIT OF EXCELLENCE – VIPS LAW SCHOOL @ 25

योगः कर्मसु कौशलम्
IN PURSUIT OF PERFECTION

SUNEET VATS
Vice Chairman, VIPS-TC

In the heart of New Delhi stands the **Vivekananda Institute of Professional Studies** – Technical Campus (VIPS-TC), a living testament to the vision and dedication of its founder, Dr. S.C. Vats. A distinguished figure in education and public service, Dr. Vats seamlessly blends his roles as a physician, lawmaker, and academician, embodying the ideals of service, innovation, and nation-building.

Established in 2000 under his visionary leadership, VIPS-TC has emerged as a trailblazer in higher education. It is affiliated with Guru Gobind Singh Indraprastha University, Delhi, and recognized by the Bar Council of India (BCI), AICTE, and the University Grants Commission (UGC) under Section 2(f). The institute proudly holds the prestigious NAAC 'A++' accreditation, with a score of 3.58 on a point scale, which reflects its unwavering commitment to academic excellence.

As a founding School of VIPS-TC, the Vivekananda School of Law and Legal Studies (VSLLS) has set high standards in legal education under the dynamic leadership of Mr. Suneet Vats, Vice-Chairman, VIPS – TC and alumnus of Columbia University. The school offers innovative and industry-relevant programs including:

- B.A. LL.B. (H)
- B.B.A. LL.B. (H)
- LL.M. in Corporate Law and Alternative Dispute Resolution (ADR)

Recently, the law school has been granted approval to offer a Ph.D. in Law under GGSIP University.

VSLLS has produced a distinguished cadre of legal professionals, including:

- 24 Gold Medalists
- 67 Judicial Officers
- 30+ Advocates-on-Record

STUDENT-CENTRIC, INNOVATIVE LEARNING ENVIRONMENT

VIPS-TC fosters a vibrant and forward-thinking academic culture. Blending the Indian Knowledge System (IKS) with multidisciplinary legal education and advanced technologies, the institute has developed numerous innovative methods to enhance student learning.

Recognizing the dynamic nature of legal education, VSLLS regularly offers short-term training programs and value-added courses focused on both national and international legal developments.

Soft skills development remains a priority, cultivated through diverse activities including:

- Moot Courts
- Mock Trials
- Youth Parliament
- Model United Nations (MUNs)
- Debates
- ADR activities (Negotiation, Client Counselling, Mediation, Arbitration)
- Cultural events

Our students are encouraged to engage with society through legal aid clinics and pro bono services.

VIPS-TC is committed to nurturing the complete well-being of its students. A unique space dedicated to mindfulness, called 'Inner Space', Yoga sessions, sports facilities, dedicated psychologist.

RESEARCH AND SCHOLARSHIP

The institute promotes a robust research culture. With 45+law school publications, a monthly newsletter, and an institutional blog, VSLLS fosters a spirit of inquiry among both students and faculty.

Students are guided by experienced faculty members to publish and present research papers in national and international forums. The well-equipped library, enriched with both digital and print resources—including ancient Indian texts like the Vedas and Upanishads, as well as the latest legal publications—creates a vibrant academic environment.

INDUSTRY INTERFACE AND GLOBAL EXPOSURE

Understanding the need for synergy between education and industry, VIPS-TC organizes a variety of:

- Guest lectures
- Workshops
- Academic visits
- Seminars
- Internships with senior advocates, law firms, and corporations

VSLLS has signed numerous MOUs with renowned national and international law universities. These collaborations allow students to gain a global perspective and valuable professional insights.

CONTRIBUTING TO ATMA NIRBHAR BHARAT

VIPS-TC actively supports the national vision of Atma Nirbhar Bharat. Our alumni are not only elected members of Bar Councils, but also scholars at Ivy League universities and empanelled counsels across reputed platforms.

The VSLLS Competitive Examination Guidance Centre offers dedicated support for students preparing for:

- UGC NET
- Judicial Services Examinations
- Civil Services

LEGACY OF EXCELLENCE AND BELONGINGNESS

In its 25-year journey, VIPS-TC has built meaningful partnerships with stakeholders across the academic and legal spectrum. With an alumni network in the thousands, the institute maintains strong ties with students.

This deep-rooted sense of belongingness fosters an extended academic family at VIPS.

VIPS-TC: SHAPING VIKSIT BHARAT @ 2047

At VIPS-TC, we believe that this sense of community and academic excellence will not only strengthen our institution but also contribute to building a Viksit Bharat by 2047. As such, VIPS-TC proudly stands as a 'social constructor' of India's future.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LEISURE

EXHIBITION

ART HOUSE

Anita Dube's solo exhibition at Delhi's Vadehra Art Gallery makes nifty use of the gallery space to showcase her work

Photograph by BANDEEP SINGH

It

is quite unusual to come across an exhibition where the gallery and the work itself arrive at a kind of tandem, as though it were custom-made for the contours of that specific space. But that's exactly what Anita Dube has achieved with her latest solo exhibition, *Three Storey House*, at Delhi's Vadehra Art Gallery (on till April 19). The gallery's three-floored building is the perfect conduit for Dube's vision. The top floor consists of abstract works (fabric, glue and plywood) she made during the pandemic and they evoke that sense of alienation that so many of us shared at the time. As we move down, each level takes on a different tone and form.

"Because this was my first solo exhibition in a while," Dube recalls, "there were suggestions that I could maybe pick a bigger, more laterally spread-out venue, but I told them that this structure (Vadehra Gallery) was perfect for me because this exhibition is really three bodies of work in one. As an artist, you don't want to be boxed into categories, like I don't want to be seen as only a political artist. If you decided to become an artist, at some level you want freedom, whether from societal constraints or familial ones."

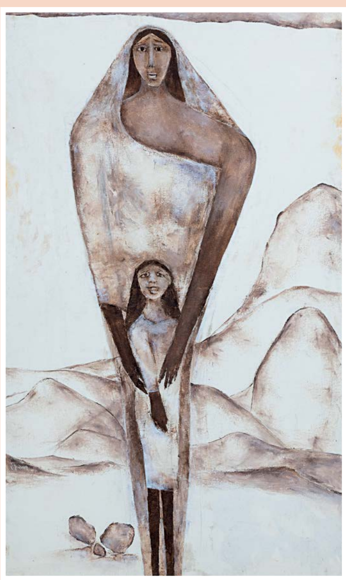
The middle floor moves on to truisms and quotes by the likes of B.R. Ambedkar and Nelson Mandela. In 'After Dr Ambedkar' (velvet, cloth, thread, embroidery, wood, 67.25 x 56 inches), the words "Educate Agitate Organize" are emblazoned on a blue-green backdrop. As Dube explains, these can be seen as an effort to create "new flags" for popular, historically important resistance movements. "While I'm not a party member, I have always been connected with the Left," says Dube. "I feel like our resistance movements are impoverished because we don't have languages that are full of joy and full of hope.

CRIMSON, OCHRE AND VIOLET
An untitled work (fabric, glue and plywood, 2023) by Anita Dube on display at Vadehra Art Gallery

ART

RICH LEGACIES

A new art gallery in Mumbai aims to complete the narrative of South Asian art history, kicking off with a selection of Haku Shah's works



THEMES FOR A MASTER
Left, 'Mother and Child' (oil on canvas, 2009) and 'Jekare Angane Naurangiya' (oil on canvas, 2002) by Haku Shah

In Mumbai's Fort district–home to many art galleries–Subcontinent is a new entrant dedicated to exploring South Asia's imprint on visual and material culture. Founded by Dhwani Gudka and Keshav Mahendru, it is designed as a space of inquiry for exploring the artistic identities of the region. "We started Subcontinent because of our deep engagement with the art, culture and archaeology of our region. Apart from exhibitions, we want to have archival material and different mediums

I wanted to create these hangings and banners and the entire work (*Three Storey House*), really, for actual grassroots movements. It's at the exhibition stage right now but, in an ideal world, they should be in public squares, maybe in pandals or riding...on the backs of trucks."

Throughout her career, Dube has been deeply interested in the idea of the sacred. Why do we worship the entities that we do? How do massively popular belief systems maintain and expand their hold on the public imagination? Her engagement with this theme has manifested in several interesting ways, like the usage of ceramic 'votive' eyes (the kind used to make statues of Hindu deities) in her works. The installation 'Strike' (2014) used these eyes in the context of warfare and large-scale conflict.

"This has been an idea that has stayed with me for much of my career," recalls Dube. "To take the tools and the icons of religiosity and apply them in secular contexts. In every society, the idea of religion is tied up with self-betterment... smarter, wiser, kinder. I am not a religious person, so the question for me is, how can I reach those same objectives? The goddess eyes, for example, speak to that question."

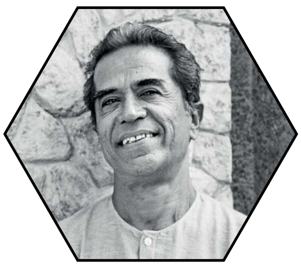
The ground floor segment of *Three Storey House* requires a degree of immersion from the visitor. It's a little unsettling by design and the storytelling is directly informed by George Orwell's *Animal Farm* and the key elements of the Dadaist movement (surrealism, humour, the uncanny/absurd). As Dube writes in the introductory text for the exhibition, this ground floor is "an 'Animal Farm', a 'Dada' place—with carnivorous leopards and snake-charmers cheered on by foot soldiers, while alienated individuals drunk on an unmindful 'me' culture climb on each other's back to create a mountain of aspiration (...)." While the text lays out the theoretical underpinnings of the work, one particular section of this 'ground floor' works in eye-catching fashion. A group of plastic-and-industrial material 'hands' start clapping the moment you get close to them (a motion detector set-up). And it's not shallow clapping but a loud and unnerving thunderclap applause that seems to bounce off the walls in reverberatory glee.

Always interested in **THE IDEA OF THE SACRED**, it has manifested in interesting ways in Dube's work, like the use of 'votive' eyes

"Orwell becomes an excuse for me to talk about the here and the now," says Dube. "You can see governments the world over adopting a more authoritarian stance. The applauding hands are triggered when you approach them because for a certain kind of leader, automatic applause is very important."

The narrative device of moving across a high-rise building—in the literal as well as sociological sense—is not unique. J.G. Ballard did it 50 years ago, in the 1975 novel *High-Rise*. But Dube truly makes this framework her own here, with every segment having something different to say. With its keen eye for allegory and its thematic nimbleness, *Three Storey House* offers an immersive experience. ■

–Aditya Mani Jha



The exhibition highlights Haku Shah's engagement with craft traditions and ecological symbolism through the synthesis of *mati* (earth), *ghat* (vessel) and *shakti* (feminine energy)

from different time periods; it has to be a conversation around the larger art history of the region," says Gudka, who is a South Asian art specialist. Mahendru is the founder of FAQ Art, a boutique art advisory firm that has worked with leading galleries, museums, private collectors and corporations.

The gallery represents 'The Estate of Haku Shah', and its inaugural exhibition, *Ya Ghat Bheetar/Rediscovering Form*, showcases a selection of his works, curated by Jesal Thacker. It deep-dives into Shah's seven-decade-long artistic practice, highlighting his engagement with craft traditions and ecological symbolism through the triadic synthesis of *mati* (earth), *ghat* (vessel) and *shakti* (feminine energy). Shah was influenced by the rhythms of rural life, which shaped his artistic/academic pursuits. "Haku Shah is known as an ethnographer, but we wanted to highlight him as a painter. There's a correlation of the paintings with the form of the *ghat* and the correlation of the *ghat* with the woman. Because that has been the crux of Haku Shah's work–documenting the processes of potters and craftspeople and integrating the act of creating, archiving and collecting into his artistic vision," says Thacker.

The exhibition presents about a dozen of his paintings, alongside an archive of photographs of potters at work and the resulting terracotta pieces. "At Subcontinent, we're committed to bringing forth the vision and legacy of Haku Shah as a modernist artist-thinker and building a nuanced appreciation of his practice," says Mahendru. ■

'Ya Ghat Bheetar/Rediscovering Form' continues until April 30 at Subcontinent, Apeejay Chambers, Fort, Mumbai

–Prachi Joshi

CULTURE

Dance of the *Divine*

Mudra, the NCPA's annual dance festival, is back in April, with some of India's best dancers interpreting the theme of 'aharya', the aesthetics of Indian classical dance

The excitement currently whirling around the corridors of Mumbai's National Centre for the Performing Arts (NCPA) is palpable. Its focal point is their annual dance festival, Mudra 2025, which began on April 3 and will continue until April 29. This year's Mudra features over 100 performers, including accompanying musicians. Audiences are being treated to performances of classical dances such as Bharatanatyam, Odissi, Kathak and Kuchipudi, as well as folk dances at multiple venues across the NCPA.

Dr Swapnokalpa Dasgupta, who has been head of the dance department at the NCPA since 2013, explains how Mudra is a thematic festival rather than simply a dance showcase. "Our themes are intentionally thought-provoking, encouraging artistes to reflect on aspects they might not otherwise consider," she shares. This year's theme is 'aharya', which, she says, plays a very integral role in 'abhinaya', or acting, within Indian classical dance and aesthetics, as described in the *Natyashastra*.

ALONG WITH PERFORMANCES, MUDRA INCLUDES DANCE SKETCHES AND DANCESCAPES BY ARTISTE SUBODH PODDAR

"Aharya creates the crucial first impression before movement or music begins. This is why I've included an exhibition by photographer Avinash Pasricha," explains Dasgupta. Additionally, the exhibition includes dance sketches and dancescapes by the renowned artiste Subodh Poddar, which creatively depict the movement and serve as a visual explora-

SHAILESH MULE

JOYOUS STEPS
An NCPA production, *Nrityavani* being performed; inset, Swapnokalpa Dasgupta, head of the dance department at NCPA

tion of dance, further enriching the overall experience. At the Mudra dance festival, they are showcasing various classical forms with their distinctive aharya elements—the Kuchipudi *thala* plate, the distinctive *veni* (plait) used in certain dance forms, and even modern interpretations in Bollywood like Kathak danseuse Saswati Sen's work, where she performs to iconic songs choreographed by Pt Birju Maharaj from movies like *Shatranj Ke Khiladi* and *Devdas*. While you may have missed performances by Kuchipudi dancer Vyjayanthi Kashi & her troupe or *Eka Prashna*, an Odissi presentation by Dr Aruna Mohanty & troupe, portraying the voices of mythical women seeking answers, you can still plan to see the Rangasri Little Ballet Troupe's *The Ramayana – A Dance Drama in Puppet Style*, a visually striking retelling using stylised masks and human puppetry. Or *Beeja—Earth Seed*, an evocative Bharatanatyam production by Padma Shri Malavika Sarukkai, which contemplates humanity's impact on the planet.

Do festivals like this make classical dance relatable to contemporary audiences? Dasgupta responds, "There's a conception that classical dance needs modernisation to be relatable, but I disagree. These art forms speak to our everyday lives, spirituality and personal growth. We make specific efforts to explain elements like shlokas or particular messages to audiences. Our post-performance discussions with renowned artistes explore deeper aspects of each theme."

"As a community, we must encourage attendance at these performances. The more we value our cultural heritage, the more we ensure it thrives for future generations," she concludes. ■

–Priya Pathiyan

OF PAST STRUGGLES
Clockwise from left, Hans-Joachim Lietsche, Abhiroop Banerjee and the Brandenburg Gate in the '70s

DOCUMENTARY

PRISON DIARIES

***Abhiroop Banerjee**'s first documentary,* Beyond the Berlin Wall, *featuring interviews with Stasi prisoners, has bagged a major award*

Kolkata-born Abhiroop Banerjee has yet to finish his bachelor's degree in film, and he has become the recipient of a top award at the Berlin Independent Film Festival. In February, his documentary, *Beyond the Berlin Wall–Reports from Stasi Prisoners*, won the Best Documentary Feature award at the festival's 2025 edition. Banerjee shares it with his co-directors Berglind Sóley Elstermann Jansdóttir, Marcela Faganello Galluzzi and Matthias Leupold.

The 61-minute film features interviews with three former political prisoners, who look back on their memories of subjugation in the hands of the Stasi, the state security of Communist East Germany, and their imprisonment at the then Stasi prison, the Hohenschönhausen Interrogation Centre. The interviewees include Leupold, who was a driver for a fashion magazine at the time, as well as former television journalist Edda Schönherz and former window dresser Hans-Joachim (Akki) Lietsche.

Other than the interviews, the documentary **IS PACKED WITH ARCHIVAL** photos of East Germany

Leupold is Banerjee's professor at his film school in Berlin, and often conducts guided tours at the Hohenschönhausen, which is now a memorial centre. "I was introduced to the prison when he arranged a tour for my class, and that is also how the idea of the documentary originated," says Banerjee. "I had a vague idea about the GDR and what the Berlin Wall stood for, but visiting the prison and making the documentary made it more real." Besides the interviews, the documentary is packed with archival photographs of East Germany.

For Banerjee, the filmmaking experience was an eye-opener. "There's a difference between reading about something in a textbook and listening to someone share their experience," he says. Leupold's presence helped Banerjee get access to the prison. "We shot the three interviews in three days, for around two hours for each. But we did come back to shoot some B-rolls after we had started editing, which was a long process of deciding what to keep and what to leave out."

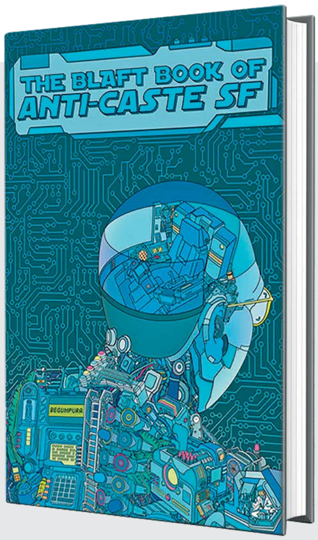
"Surreal" is what Banerjee says is the experience of winning a top film festival award, that too for his "first film of any kind, one I have been a part of from beginning to end". He hopes to move into fiction soon. As for returning to his homeland, he is ecstatic: "I really, really want to make films in India." ■

–Devarsi Ghosh

BOOKS

REALITY CHECK

The Blaft Book of Anti-Caste SF is a must-read collection of dark tales lit by flashes of wry, sardonic humour



The Blaft Book of Anti-Caste SF
Edited by R.T. Samuel, Rakesh K., Rashmi R.D.
BLAFT PUBLICATIONS
₹995; 450 pages

Reading this book is like jumping aboard a spacecraft made of stories, to hunt down the demons that have haunted Indo-South Asia for centuries.

Caste-based intolerance is the main bogey, of course. But gender-based injustice, power differentials and raw hypocrisy share the stage equally. The stories are dark, but lit by flashes of wry, sardonic humour. Out of 30 tales, eight are translated from other Indian languages. All of them include italicised words that don't have simple counterparts in English, with explanations in the 'Notes' at the back of the book.

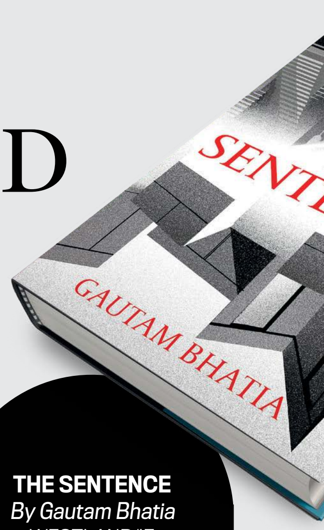
I wondered about the title. Would the book have been more sincerely "anti-caste" had it made no reference to caste at all in the title? Doesn't this formulation lead us to think

BOOKS

MINEFIELD OF IDEAS

Being a lawyer, Gautam Bhatia is uniquely placed to address ideas at the intersection of politics and morality, as he does in *The Sentence*, his latest work of speculative fiction

In *Star Wars: The Empire Strikes Back*, the dashing Han Solo (Harrison Ford) is 'frozen' in solid carbonite casing by the film's villain, Darth Vader. He isn't dead (yet) but he is in a state of reversible hibernation. A similar punishment lies at the heart of Gautam Bhatia's work of speculative fiction, *The Sentence*. The narrative is set in the mining-led city-state of Peruma, which has always faced tense relations between capital and labour, dwelling in the 'Council' and the 'Commune', respectively. A hundred years before the events of the novel, a man named Jagat allegedly murdered a high-ranking Council official, because of which he was sentenced to 'cryo-sleep', a state of cryogenic hibernation not entirely unlike Han Solo's. And now, almost a century later, the novel's protagonist, a Guardian (think of it as a lawyer, but with extra steps and soothing noises about honour and duty)



THE SENTENCE
By Gautam Bhatia
WESTLAND/IF
₹599; 396 pages

of the caste affiliations of the authors? Would our responses to the stories themselves be any different had they been published without that qualifier?

All regardless, this is a must-read collection. People who claim to hate SF need to overcome their prejudices and take the plunge.

Frankly, it's a little ridiculous to even make a distinction between spec-fiction and the ordinary kind these days. In every real sense, we live in a multiverse of layered time-zones and embattled technologies. We Indians, in particular, have become cultural chimeras: we have Asian hearts, British language and American business practices but the claws and poison sacs of ancient prejudice.

The stories are as texturally varied as the accents at a UN Conference. Nabi H. Ali's 'Melonhead' for instance, is a warm and conventionally well-structured story in which two variations of Islam get help from a djinn. In Gautam Vegda's four brief fables, vultures are de-formed, reformed and regurgitated through the author's ruthless vision of cruelty and injustice.

In Yeswanth Morchala's 'Looly Cooly' collage-graphic images are stitched together to make a cheekily funny-bitter comic. In Bakarmax's 'Spacewali', Indian astronauts beam up their sweeper-lady as well as their ancient prejudices about the division of labour. In Archita Mittra's 'Happily Ever After', two young women escape into a sweet-sad paradise of their own making, by snatching a magical victory out of the fire of hate that surrounds them.

'Margin Mag', by Sudarshan Devadoss and M.K. Abhilash, is a Monty-Pythonesque e-zine, revealing the spirit in which the book may have been conceived. R.T. Samuel's 'Introduction' offers a clear and well-reasoned rationale for how and why the book came into being. It's a great standalone essay about SF in South Asia and a sharp critique of existing Indian SF publications and authors.

> Along with caste-based intolerance, **GENDER-BASED INJUSTICE**, power differentials and raw hypocrisy share the stage in these stories

Samuel quotes Sant Ravidas, "a radical anti-caste thinker and poet" of the 14th century, writing of a utopia called "Begumpura". While enjoying the poem, I had believed in my ignorance, that the name referred to a woman, i.e., a 'Begum'. But a friend with whom I shared the poem immediately deconstructed it as "be-*gum*", meaning "without pain".

It was a tiny reminder of the many ways in which books, words and titles punch open the windows of our perceptions. ■

–Manjula Padmanabhan

named Nila is approached to fight Jagat's case and prove his innocence—even if that innocence proves to be a powder keg for Peruma's hard-fought peace.

First, the good stuff. This is a premise with undeniable potential—a legal thriller and a political allegory wrapped lovingly with genre beats. Bhatia, a lawyer, is very good on the absurdities of realpolitik (Peruma's peace is accompanied by the aptly named 'Pact of Forgetting') or ideas at the intersection of politics and morality. The nods to Isaac Asimov's *Foundation* are also enjoyable, for the most part. For example, in Asimov's fictional science of psychohistory, pivotal moments in history are called "inflection points", something borrowed by Bhatia wholesale—he attributes the nomenclature to the fictional "D.D. Mausambi", a humorous allusion ('mausambi' is 'sweet lime' in Hindi) to the Indian mathematician-historian D.D. Kosambi (1907-1966).

> **The novel is a legal thriller and political allegory wrapped with genre beats. Bhatia is very good on the absurdities of realpolitik**

However, good novels are unruly, many-eyed creatures, filled with several distinct kinds of writing. And Bhatia hasn't got the hang of writing dialogue just yet. Nila swings between being a reserved protagonist and delivering cloyingly poetic lines. Maru, her best friend, could have been replaced by a TV voiceover because his primary purpose seems to be "plot-recapper". These issues were far less prominent in Bhatia's previous novel *The Wall*, but this could have done with a firmer editorial hand. ■

–Aditya Mani Jha

Q+A

Unstoppable Him

Age is just a number for **KABIR BEDI**, 79, who has had a spate of recent OTT releases and has many projects in the pipeline

Q. Tell us about some of your recent roles.
I've been busier recently than I have been in a long, long time. I released an Italian film in Italy, called Questione di Stoffa (A Question of Fabric), last November. It is the story of the rivalry between an Indian and Italian family of tailors. Currently, I also have four new shows on various OTT platforms, including Berlin on Zee5, Life Hill Gayi on JioHotstar, Tanaav 2 on SonyLiv and the latest is Aachari Baa with Neena Gupta on JioHotstar.

Q. If you hadn't turned to acting, what would you have become?
I had wanted to be an architect, because I was fascinated with buildings. But because I had to work my way through college due to family circumstances, I couldn't. So, while studying history at St Stephen's College, I worked on the side at All India Radio and Doordarshan. That's what launched my career, and sent me off to Bombay. It all happened because I managed to scoop an interview with The Beatles while working at AIR.

Q. Your parents were both spiritual people. Are you too?
My parents went from being freedom fighters to becoming very important spiritual figures. My mother became the highest ordained Buddhist monk in the world in the Tibetan tradition, and my father became a philosopher who had a major impact in Italy. In fact, I myself was ordained as a Buddhist monk in Burma when I was about 12. I also believe in the tenets of the Sikh religion, which is part of my heritage.

Q. What are you working on next?
I'm now flying to Canada to shoot a film about six soldiers in the Second World War. In the summer, I'll be shooting another Italian film. Apart from that, there are two more OTT projects in discussion.

–with Neha Kirpal

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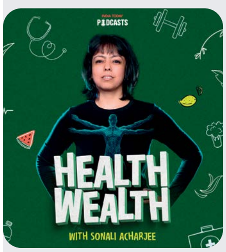

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