IAS WITH DR RAVI
AIM. PREPARE. ACHIEVE

CA COMPASS — UPSC Daily

STEP 1: CURRENT AFFAIRS NOTES

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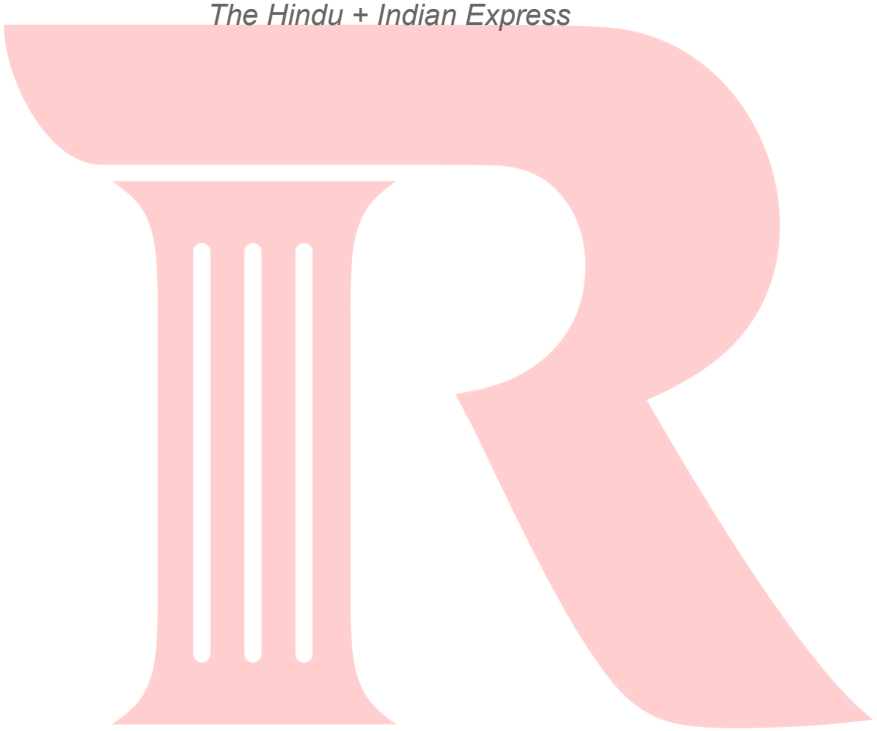

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GS2: Judiciary / UAPA / Bail / Constitutional Law

1. SC Refers UAPA Bail Curbs Question to Larger Bench, Grants Interim Bail

Source: *The Hindu (Aaratrika Bhaumik)* | ***Subject:*** *Judiciary / UAPA / Bail / Liberty / Coordinate Bench Discipline / GS2*

Context: The Supreme Court on Friday granted six months of interim bail to two accused in the 2020 Delhi riots case — Abdul Khalid Saifi and Tasleem Ahmad — while referring to a larger Bench the question of whether prolonged incarceration and delay in trial can override the stringent bail curbs under anti-terror laws such as the Unlawful Activities (Prevention) Act, 1967 (UAPA). The Bench of Justices Aravind Kumar and P.B. Varale said the reference was necessary to ensure "parity, consistency and institutional fidelity" in the application of binding precedents by coordinate Benches. The Court held: "Where a coordinate Bench entertains reservations about the reasoning of an earlier coordinate Bench, particularly on the application of a binding three-judge Bench decision, the proper course is well settled. The matter must ordinarily be placed before the Chief Justice of India for the constitution of an appropriate Bench. A coordinate Bench cannot, by strong observations, effectively unsettle the ratio of an earlier coordinate Bench while continuing to sit in equal strength." The reference came in response to the Delhi Police's contention that a May 18 judgment delivered by a coordinate Bench — which had expressed "serious reservations" about the Justice Kumar-headed Bench's January ruling refusing bail to activists Umar Khalid and Sharjeel Imam in the Delhi riots "larger conspiracy" case — had proceeded on a "blanket generalisation" of Supreme Court precedents. Additional Solicitor General S.V. Raju, appearing for the Delhi Police, told the Bench that the question of bail must turn on the facts and circumstances of each case. The accused were challenging a September 2, 2025 order of the Delhi High Court denying them bail.

EXAMINER'S LENS

* Prelims: UAPA 1967: Sec 43D(5) — bail restriction (court shall not grant bail if reasonable grounds exist to believe accusation is prima facie true). SC refers to larger Bench. Justices Aravind Kumar and P.B. Varale. Coordinate Bench discipline: cannot unsettle ratio of earlier coordinate Bench of equal strength. Interim bail: 6 months to Saifi and Tasleem Ahmad. 2020 Delhi riots "larger conspiracy" case. May 18 coordinate Bench: "serious reservations." ASG S.V. Raju. Delhi HC order: Sept 2, 2025.

* Mains: GS2 (Judiciary/Liberty). UAPA bail restrictions. Prolonged incarceration. Coordinate Bench discipline. Judicial precedent and institutional fidelity. Liberty vs security in anti-terror law.
* GS4/Interview: When a person spends years in jail under a law that restricts bail based on the accusation (not conviction), the justice system must ask whether the process itself has become the punishment. The UAPA's Sec 43D(5) creates a near-impossible bail standard. When does national security justify indefinite pre-trial detention, and when does it become a violation of the liberty the state exists to protect?

Key Points:

- The reference to a larger Bench on whether prolonged incarceration can override UAPA bail restrictions is constitutionally significant. UAPA Sec 43D(5) requires the court to deny bail if there are "reasonable grounds for believing that the accusation against such person is prima facie true." This effectively reverses the normal bail standard: instead of the prosecution showing why bail should be denied, the accused must show why the accusation is not prima facie true. The question before the larger Bench is whether this statutory bar yields to the constitutional right to liberty (Art 21) when trial is indefinitely delayed.
- The coordinate Bench discipline issue is jurisprudentially important. A coordinate Bench (same number of judges) cannot overrule or effectively unsettle the ratio of another coordinate Bench. If it disagrees, the matter must be referred to the CJI for constitution of a larger Bench. The May 18 judgment's "serious reservations" about the January ruling refusing bail to Umar Khalid and Sharjeel Imam was, in effect, a coordinate Bench questioning another coordinate Bench's reasoning — procedurally improper without a formal reference. The current Bench's reference corrects this by channelling the disagreement through proper institutional procedure.
- The Delhi riots "larger conspiracy" case has become a test case for UAPA's bail provisions. Multiple accused have spent 5+ years in pre-trial detention. The charge sheet runs to thousands of pages. Trial progress has been glacial. The question of whether prolonged incarceration itself constitutes a ground for bail under UAPA connects to the broader justice infrastructure debate (May 21): when courts are understaffed (15 judges per 10 lakh vs 50 recommended), trials are delayed, and UAPA's bail bar ensures accused remain incarcerated throughout.
- The 6-month interim bail to Saifi and Ahmad is a practical acknowledgment that incarceration during prolonged reference proceedings would be unjust. But it is temporary relief pending the larger Bench's determination. The larger Bench's decision will set the framework for hundreds of UAPA cases where accused are in prolonged pre-trial detention across the country.

STATIC CONNECT

▶ UAPA & Bail Jurisprudence

* UAPA 1967: Unlawful Activities (Prevention) Act. Amended 2004, 2008, 2012, 2019. Sec 43D(5): bail restriction. Sec 15: terrorist act. Sec 18: conspiracy. 2019 amendment: individual designation as terrorist.
* Bail jurisprudence: Arnesh Kumar v State of Bihar (2014): unnecessary arrest. Satender Kumar Antil (2022): bail as rule, jail as exception. NIA v Zahoor Watali (2019): UAPA bail — court must accept charge sheet at face value. Thwaha Fasal v UoI (2021): UAPA bail granted considering delay.
* Coordinate Bench discipline: Binding precedent. Per incuriam. Sub-silentio. Larger Bench reference. Art 141: law declared by SC binding on all courts. Art 145(3): substantial question of law — minimum 5 judges.
* Art 21: Right to life and personal liberty. Maneka Gandhi v UoI (1978): expanded scope. Bail and liberty: K.A. Najeeb Abdul Nazar v UoI (2021) — SC granted bail in UAPA case citing prolonged incarceration.
* Delhi riots 2020: February 2020 communal violence. “Larger conspiracy” charge sheet under UAPA. Multiple accused: Umar Khalid, Sharjeel Imam, Saifi, Tasleem Ahmad, others. Prolonged pre-trial detention.

3-2-1 RAPID REVISION

3 Prelims:

* UAPA Sec 43D(5): bail restriction — court shall not grant bail if accusation prima facie true. SC refers to larger Bench: whether prolonged incarceration overrides bail bar. Justices Aravind Kumar & P.B. Varale.
* Coordinate Bench: cannot unsettle ratio of earlier coordinate Bench of equal strength. Must refer to CJI for larger Bench. May 18 judgment: “serious reservations” about January ruling. ASG S.V. Raju for Delhi Police.
* Interim bail: 6 months to Saifi & Tasleem Ahmad. Delhi riots 2020 “larger conspiracy.” Delhi HC: Sept 2, 2025 denial. K.A. Najeeb Abdul Nazar (2021): UAPA bail for prolonged incarceration.

2 Mains:

* The larger Bench reference on UAPA bail will determine whether Art 21’s liberty guarantee creates a constitutional ceiling on pre-trial detention even under anti-terror statutes. UAPA Sec 43D(5) effectively reverses the bail standard, requiring the accused to disprove the accusation rather than the prosecution to justify detention. When trial delays extend incarceration to 5+ years without conviction, the statutory bail bar becomes a de facto punishment without trial. The K.A. Najeeb precedent (2021) recognised prolonged incarceration as a ground for bail in UAPA cases, but the scope of that ruling remains contested — hence the reference.
* The coordinate Bench discipline issue reinforces institutional procedure: disagreement between equal-strength Benches must be resolved through a larger Bench, not through strong observations

that effectively undermine a prior ruling. This preserves the predictability and consistency of SC jurisprudence. The reference also creates space for the Court to definitively resolve the tension between UAPA's security-oriented bail restriction and Art 21's liberty guarantee — a resolution that individual Bench decisions have been unable to achieve.

1 Essay:

When the process becomes the punishment — when years of pre-trial detention under a bail bar designed for security become indistinguishable from a sentence without trial — the justice system must confront whether the law is protecting the state or violating the individual. The larger Bench's answer will define the boundary between national security and personal liberty. Use: UAPA, bail, liberty, Art 21, judicial precedent, prolonged incarceration.

Mains Q: *Discuss the significance of the SC's reference to a larger Bench on whether prolonged incarceration can override UAPA bail restrictions. How does the coordinate Bench discipline principle ensure consistency in constitutional adjudication? (15M)*

GS3: Internal Security / Border Management / Smart Borders / BSF

2. Smart Border Project to Make Frontiers Impregnable — Amit Shah

Source: *The Hindu + Indian Express (Vijaita Singh)* | ***Subject:*** *Internal Security / Border Management / Technology / BSF / GS2-GS3*

Context: Union Home Minister Amit Shah, addressing the BSF Investiture Ceremony and the Rustamji Memorial Lecture (in honour of BSF founder Director General K.F. Rustamji), announced that a Smart Border concept will be unveiled soon, making the entire Pakistan and Bangladesh borders "impregnable." The project will be equipped with drones, radars, cameras, and other technical resources to plug gaps in border security. Shah stated: "The Government of India has decided to not only stop infiltration but also deport each and every infiltrator. We will not allow unnatural demographic changes. Tripura, West Bengal and Assam now have governments who are convinced that there should be no infiltration." He called on border personnel to have dialogue with patwaris and district magistrates to identify infiltration routes and cow smuggling routes, and to provide this information to the BSF. Shah described border security as "territorial responsibility" and announced that a demography mission will be announced soon to identify infiltration patterns. He emphasised that the BSF's role will increase further, requiring coordination with State police forces, armed forces, other paramilitary forces, Narcotics Control Bureau, and intelligence agencies.

🎯 EXAMINER'S LENS

* Prelims: Smart Border concept: drones, radars, cameras for Pakistan & Bangladesh borders. BSF (Border Security Force): founded 1965, K.F. Rustamji. Rustamji Memorial Lecture. BSF jurisdiction: extended to 50 km in some border States (2021 notification). Demography mission announced. Narcotics Control Bureau. CIBMS (Comprehensive Integrated Border Management System) — existing programme.
* Mains: GS2/GS3 (Internal Security). Smart border technology. BSF role expansion. Demographic security. Border management challenges. Technology-driven surveillance. Centre-State coordination on border security.
* GS4/Interview: Smart borders use technology to seal frontiers. But technology that monitors infiltration can also surveil border populations. When the state frames demographic change as a security threat,

the line between border management and demographic policing becomes blurred. How should democracies distinguish between legitimate border security and demographic surveillance?

Key Points:

- The Smart Border concept represents the latest iteration of India's technology-driven border management strategy. The existing Comprehensive Integrated Border Management System (CIBMS) has been deployed on select stretches of the Pakistan and Bangladesh borders, integrating thermal sensors, underground sensors, laser barriers, and CCTV cameras. The new Smart Border project appears to expand this with drones, radars, and comprehensive camera coverage across the entire border length — 4,096 km with Bangladesh and 3,323 km with Pakistan.
- The BSF's role expansion is significant. The 2021 notification extending BSF jurisdiction to 50 km from the border in Punjab, West Bengal, and Assam (from the earlier 15 km) was controversial, with States protesting central overreach. Shah's framing of border security as "territorial responsibility" and the call for BSF coordination with patwaris and district magistrates signals a further integration of border security with local governance — blurring the traditional separation between paramilitary border guarding and civilian district administration.
- The demography mission announcement connects border security to demographic monitoring. The framing of "unnatural demographic changes" as a security threat links infiltration to population composition changes in border districts. This is politically significant in the Northeast (Tripura, Assam) and West Bengal, where demographic change in border areas has been a long-standing political issue. The mission will identify "infiltration patterns" — but the methodology and civil liberties implications are undefined.
- The technology challenge is implementation: India's borders with Bangladesh include riverine stretches (Brahmaputra delta), char lands (shifting river islands), and densely populated border villages where physical fencing is impossible. The Pakistan border includes desert (Rajasthan), marshland (Rann of Kutch), and mountainous terrain (J&K). No single technology solution covers all terrain types. The Smart Border must integrate multiple technologies with human intelligence and local governance for effectiveness.

STATIC CONNECT

▶ **Border Management & BSF**

* BSF: Founded 1965. DG-level force under MHA. Primary role: Pakistan & Bangladesh border guarding. Also deployed for internal security (elections, counter-insurgency).
* CIBMS: Comprehensive Integrated Border Management System. Piloted on Indo-Pak border (Jammu sector) and Indo-Bangladesh border (Dhubri, Assam). Sensors, cameras, laser barriers.
* Border fencing: Indo-Bangladesh: ~4,096 km. Fencing: ~3,141 km completed (as of 2024). Indo-Pak: ~3,323 km. Fencing largely complete except riverine/marshy stretches.
* BSF jurisdiction: 2021 notification extended to 50 km in Punjab, WB, Assam. Powers: search, seize, arrest under Passport Act, NDPS Act, FCRA. States protested (Punjab, WB).
* Other border forces: ITBP (China border), SSB (Nepal/Bhutan border), AR (NE insurgency), Coast Guard (maritime).

3-2-1 RAPID REVISION

3 Prelims:

* Smart Border: drones, radars, cameras for Pakistan & Bangladesh borders. BSF founded 1965, K.F. Rustamji. Rustamji Memorial Lecture. CIBMS: existing programme (sensors, cameras, laser barriers).
* BSF jurisdiction extended to 50 km (2021 notification) in Punjab, WB, Assam. Demography mission announced. “Territorial responsibility.” Narcotics Control Bureau coordination.
* Indo-Bangladesh border: ~4,096 km. Indo-Pakistan border: ~3,323 km. Border fencing: ~3,141 km completed (Bangladesh). Terrain: riverine, char lands, desert, marsh, mountains.

2 Mains:

* The Smart Border concept addresses a genuine security gap: India’s long borders with Pakistan (3,323 km) and Bangladesh (4,096 km) include terrain where physical fencing is impossible (riverine stretches, char lands, marshes). Technology-driven surveillance (drones, radars, cameras) can provide coverage where fences cannot. But technology alone is insufficient: effective border management requires integration of electronic surveillance with human intelligence, local governance cooperation (patwaris, district administration), and responsive deployment. The CIBMS pilot experience shows that maintenance, connectivity, and false-alarm management are persistent challenges.
* The demography mission and “unnatural demographic changes” framing raises civil liberties concerns. Demographic monitoring in border areas can serve legitimate security purposes (identifying infiltration patterns) but can also become a tool for profiling border populations — particularly religious and ethnic minorities in sensitive border districts. The mission’s methodology, legal framework, and oversight mechanisms are undefined. Without clear safeguards, demographic

monitoring risks becoming demographic surveillance, conflating border security with population management.

1 Essay:

When technology makes borders "impregnable," the question shifts from who gets in to who gets watched. Smart borders protect sovereignty, but the same drones and cameras that detect infiltrators also survey border populations. The challenge for democracies is to build borders that are secure without becoming surveillance states. Use: Border management, technology, BSF, demographic security, civil liberties.

Mains Q: *Discuss the Smart Border concept and its potential for securing India's Pakistan and Bangladesh borders. What are the technological and civil liberties challenges of integrating demographic monitoring with border security? (15M)*

GS2/GS3: IR / Cyber Warfare / International Law / Digital Security

3. Cyber Warfare Is Outpacing Global Legal Accountability

Source: *The Hindu (Jyoti Singh)* | ***Subject:*** *International Relations / Cyber Warfare / International Law / Digital Security / GS2-GS3*

Context: Jyoti Singh (advocate, Delhi; researching cyber warfare and use of force under international law) argues that recent tensions involving the US, Israel, and Iran highlight a clear shift in how force is exercised. The recent strikes were accompanied not only by conventional military action but also by cyber operations, including hacking of news websites and widely used applications to disrupt communication and influence the information environment. Groups such as the Handala Hack Team have claimed responsibility for attacks on entities including a US-based medical technology company. International law does not lack relevant principles: Art 2(4) of the UN Charter (prohibition on the use of force) and the framework of state responsibility apply to cyberspace in principle. But determining when cyber conduct crosses the threshold to become an internationally wrongful act or a prohibited use of force is the most complicated part. Such actions could lead to state responsibility and claims for compensation in theory, but establishing this threshold remains extremely difficult. The gap between political certainty and legal proof is a major reason: cyber operations are secretive, routed through multiple networks and jurisdictions. Even when governments are reasonably certain about attribution, translating that into legally admissible evidence is much harder. There is no appropriate forum: the ICJ requires state consent; domestic courts face sovereign immunity. States may avoid legal processes because cases might escalate tensions or require disclosure of sensitive intelligence. The Budapest Convention on Cybercrime and the UN Convention against Cybercrime aim to address incidents but primarily focus on cybercrime and law enforcement, falling short on state responsibility during geopolitical conflict. India has become increasingly reliant on digital infrastructure across finance, energy, and governance, facing both greater vulnerability and a larger stake in shaping international regulations.

🎯 EXAMINER'S LENS

* Prelims: Art 2(4) UN Charter: prohibition on use of force. State responsibility in cyberspace. Attribution challenge. Budapest Convention on Cybercrime (2001, Council of Europe). UN Convention against Cybercrime (2024). Handala Hack Team. ICJ: requires state consent for jurisdiction. Sovereign immunity: barrier in domestic courts. Tallinn Manual: non-binding academic study on international law and cyber operations.
* Mains: GS2/GS3 (IR/Security). Cyber warfare and international law. Use of force threshold. Attribution challenge. Forum problem. State responsibility. India's cyber vulnerability and norm-shaping role.
* GS4/Interview: Cyber operations cause real harm — disrupted hospitals, disabled infrastructure, stolen data — but operate in a legal grey zone where attribution is difficult, forums are unavailable, and accountability is rare. When the law cannot reach a form of warfare, does the warfare reshape the law, or does it simply operate beyond it?

Key Points:

- The article identifies three structural gaps that prevent international law from effectively addressing cyber warfare: (1) the threshold gap — when does a cyber operation cross from espionage or disruption to a use of force under Art 2(4)?; (2) the attribution gap — cyber operations are secretive, multi-jurisdictional, and deniable, making legally admissible proof nearly impossible even when political attribution is confident; and (3) the forum gap — neither the ICJ (requires state consent), domestic courts (sovereign immunity), nor existing treaty bodies (Budapest/UN Conventions focus on cybercrime, not state-sponsored cyber warfare) provide an appropriate adjudicatory venue.
- The Tallinn Manual (2013, updated 2017) — a non-binding academic study commissioned by NATO's Cooperative Cyber Defence Centre of Excellence — attempted to apply existing international law to cyber operations. It concluded that the prohibition on the use of force, the law of armed conflict, and state responsibility principles apply to cyberspace. But the Manual is not binding, and States have been reluctant to formally accept its framework, preferring strategic ambiguity about what constitutes a "cyber attack" vs "cyber espionage" vs "cyber operation."
- The existing treaty framework is inadequate for state-sponsored cyber warfare. The Budapest Convention on Cybercrime (2001, Council of Europe) addresses criminal hacking, fraud, and content offences — not state-directed cyber operations during armed conflict. The UN Convention against Cybercrime (adopted 2024) similarly focuses on law enforcement cooperation against cybercrime, not the regulation of state behaviour in cyberspace during

geopolitical conflict. Neither convention addresses attribution, use of force thresholds, or state responsibility for cyber operations.

- India's stake is particularly high. India's digital infrastructure (UPI processing billions of transactions, Aadhaar covering 1.3 billion identities, DigiLocker, CoWIN) makes it uniquely vulnerable to cyber disruption. India has also been the target of state-linked cyber operations (suspected Chinese APT groups targeting power grids, government networks). India must simultaneously strengthen domestic cyber resilience (CERT-In, National Cyber Security Policy) and actively engage in international norm-setting to ensure that the emerging framework addresses state responsibility, not just cybercrime.

STATIC CONNECT

▶ Cyber Warfare & International Law

* Art 2(4) UN Charter: prohibition on use of force. Art 51: self-defence. Customary international law: necessity, proportionality, distinction.
* Budapest Convention (2001): Council of Europe. Cybercrime: hacking, fraud, content. India: not a signatory. UN Convention against Cybercrime (2024): broader membership.
* Tallinn Manual (2013, 2017): NATO CCD COE. Non-binding. Applies existing international law to cyberspace. 154 rules. Not formally adopted by any State.
* India's cyber framework: IT Act 2000 (amended 2008). CERT-In. National Cyber Security Policy 2013. NCIIPC (National Critical Information Infrastructure Protection Centre). Sec 70 IT Act: critical infrastructure.
* Attribution: APT (Advanced Persistent Threat) groups. State-linked but deniable. Five Eyes intelligence sharing. India: NTRO (National Technical Research Organisation).

3-2-1 RAPID REVISION

3 Prelims:

* Art 2(4) UN Charter: prohibition on use of force — applies to cyberspace in principle. Attribution: secretive, multi-jurisdictional, deniable. No appropriate forum: ICJ needs consent; domestic courts face sovereign immunity.
* Budapest Convention on Cybercrime (2001, Council of Europe): India not signatory. UN Convention against Cybercrime (2024). Tallinn Manual (2013/2017): non-binding, NATO CCD COE. Handala Hack Team: US-Israel-Iran context.
* India: IT Act 2000. CERT-In. NCIIPC (critical infrastructure). NTRO. UPI, Aadhaar, DigiLocker: high digital vulnerability. State-linked APT groups targeting Indian infrastructure.

2 Mains:

* The structural gap between cyber warfare reality and international legal accountability has three dimensions: threshold (when is a cyber operation a use of force?), attribution (how to prove state responsibility for deniable operations?), and forum (where can claims be adjudicated?). Existing frameworks — Budapest Convention, UN Cybercrime Convention — address cybercrime but not state-directed cyber warfare during armed conflict. The Tallinn Manual provides analytical frameworks but is non-binding. The result is a growing mismatch: cyber operations are becoming more frequent and damaging, but they rarely lead to legal consequences.
* India's position requires a dual strategy: domestic cyber resilience (strengthening CERT-In, NCIIPC, critical infrastructure protection for UPI/Aadhaar) and international norm entrepreneurship (leading initiatives on state responsibility, attribution standards, and proportionality thresholds in cyberspace). India should not rely on Western-origin frameworks (Budapest Convention, Tallinn Manual) alone but should actively shape UN-level norms that reflect developing-country concerns about digital sovereignty and critical infrastructure protection.

1 Essay:

When a hospital is hacked, a power grid disabled, or an election influenced through cyber operations, the harm is real but the accountability is absent. International law has the principles — prohibition on use of force, state responsibility, proportionality — but lacks the infrastructure to apply them: no attribution standard, no forum, no enforcement. The gap between law and reality is not a gap in law but a gap in will. Use: Cyber warfare, international law, attribution, state responsibility, India's digital vulnerability.

Mains Q: *Discuss the structural gaps that prevent international law from effectively addressing state-sponsored cyber warfare. What dual strategy should India adopt to protect its critical digital infrastructure while shaping international cyber norms? (15M)*

GS3: Economy / Core Sector / Economic Distress / Fiscal Policy

4. Alarm Bells: The Core Sector Data Underscores Economic Distress

Source: *The Hindu (Editorial)* | ***Subject:*** *Economy / Core Sector / Growth Slowdown / Energy Crisis / Fiscal Policy / GS3*

Context: The Hindu editorial argues that India's economy has begun FY 2026-27 on a decidedly tepid note. The Index of Eight Core Industries (ICI) showed 1.7% growth in April 2026. But the broader picture is more concerning: growth in the ICI averaged just 2.8% for the entire FY 2025-26, down from 4.5% average for 2024-25 and significantly slower than the previous three years, each of which was above 7%. This suggests a more systemic domestic issue rather than an externally driven transient phase. Of the eight sectors, only three — steel, cement, and electricity — grew at all in April 2026. The rest contracted. Crude oil and natural gas sectors have contracted for 16 and 22 consecutive months respectively. Energy output cannot be ramped up overnight, but falling output for such long stretches should have raised policy alarm bells even before the current energy crisis began. Separate data from the Ministry of Petroleum and Natural Gas show that domestic consumption of natural gas fell in April. Had India installed long-term gas storage facilities, the fall in consumption would have provided a window to fill those reserves. Since such reserves do not exist, LNG imports in April were cut by 30%, likely to slow forex outflow. Both oil imports and domestic production fell in April. Lower fuel consumption could be government curbs on commercial usage. Fertilizer output contracted in April after a brief return to growth in March. The mitigating factor is that fertilizer demand may be lower due to below-normal monsoon and above-normal El Niño. But this is hardly comforting — the resultant dip in output and rural demand is a grave prospect. Steel and cement are the only consistently growing sectors, indicating sustained construction activity likely propelled by government expenditure. But how long this can last amid fiscal strain is uncertain. PMI data is close to four-year lows. GST collections from domestic sales are growing only slightly faster than inflation. The alarm bells are now difficult to ignore.

🎯 EXAMINER'S LENS

* Prelims: ICI (Index of Core Industries): April 2026: 1.7%. FY 2025-26 average: 2.8% (vs 4.5% in 2024-25, 7%+ in prior 3 years). Crude oil: contracted 16 consecutive months. Natural gas: 22 consecutive months. LNG imports cut 30% in April. No strategic gas storage in India. Fertilizer output contracted. Below-normal monsoon + El Niño. PMI: 4-year lows. GST collections: barely above inflation. Steel & cement: only growing sectors.
* Mains: GS3 (Economy). Core sector slowdown. Systemic vs transient decline. Energy sector structural contraction. Absence of strategic gas storage. Fiscal sustainability of construction-led growth. Rural demand collapse. PMI and GST as corroborating indicators.
* GS4/Interview: The editorial warns that alarm bells are "difficult to ignore." When three corroborating indicators — core sector contraction, PMI at four-year lows, GST collections barely above inflation — all point in the same direction, continued optimism is not confidence but denial. Policy responses require honest diagnosis before they can be effective.

Key Points:

- The editorial's most important contribution is reframing the core sector slowdown as systemic rather than transient. The decline from 7%+ average growth (three consecutive years) to 4.5% (FY 2024-25) to 2.8% (FY 2025-26) to 1.7% (April 2026) represents a persistent, accelerating deceleration that predates the current West Asia energy crisis. The editorial argues this is a domestic structural issue, not merely an external shock. This reframing matters for policy: if the slowdown is external and temporary, stimulus may be sufficient; if structural, fundamental reforms are needed.
- The energy sector's prolonged contraction (crude 16 months, natural gas 22 months) exposes a strategic infrastructure failure: India has no long-term gas storage facilities. When domestic gas consumption fell in April, that consumption dip should have been used to fill strategic reserves at lower prices. Instead, LNG imports were cut by 30% to conserve forex. Countries with strategic petroleum/gas reserves (US Strategic Petroleum Reserve, EU gas storage mandates, Japan's 90-day reserve) use consumption dips to build buffers. India's absence of storage infrastructure turns every consumption dip into a missed opportunity.
- The corroborating indicators strengthen the editorial's case: PMI near four-year lows confirms manufacturing contraction; GST collections growing barely above inflation suggests tepid domestic demand; and the rural distress signal (fertilizer contraction + below-normal monsoon + El Niño) threatens the kharif sowing season. When three independent data sources (core sector, PMI, GST) all indicate slowdown simultaneously, the probability of coincidence is low.

- The construction-led growth model's sustainability is questioned: steel and cement are the only consistently growing sectors, driven by government capital expenditure on infrastructure. But fiscal strain (rising subsidy burden from oil/fertilizer, defence spending, revenue shortfall from tepid GST) may constrain the government's ability to sustain capital expenditure at current levels. If government spending-driven construction slows, the last engine of core sector growth will stall.

STATIC CONNECT

▶ Core Sector, Energy & Economic Indicators

* Index of Eight Core Industries: 40.27% weight in IIP. Eight sectors with weights: Coal (10.33%), Crude Oil (8.98%), Natural Gas (6.88%), Refinery Products (28.04%), Fertilizers (2.63%), Steel (17.92%), Cement (5.37%), Electricity (19.85%).
* Strategic reserves: India's Strategic Petroleum Reserves: Visakhapatnam, Mangalore, Padur (total ~5.33 MMT, ~9.5 days of import cover). No strategic natural gas storage. US SPR: ~372 million barrels. EU: mandatory 90-day oil stocks.
* PMI (Purchasing Managers Index): S&P Global India Manufacturing PMI. Above 50 = expansion. Below 50 = contraction. Leading indicator.
* GST collections: Monthly indicator of economic activity. CGST + SGST + IGST + Cess. Growth above inflation = real demand growth.
* El Niño: Warming of Pacific Ocean surface. Correlates with deficient Indian monsoon. Impact on kharif sowing, agricultural output, rural demand, food inflation.

3-2-1 RAPID REVISION

3 Prelims:

* ICI April 2026: 1.7%. FY 2025-26 average: 2.8% (down from 4.5% in 2024-25, 7%+ in prior years). Crude oil: 16 months contraction. Natural gas: 22 months. LNG imports cut 30%. No strategic gas storage.
* Only steel, cement, electricity grew. Fertilizer contracted. Below-normal monsoon + El Niño. PMI: near 4-year lows. GST collections: barely above inflation. Construction-led growth from govt capex.
* India's Strategic Petroleum Reserves: Vizag, Mangalore, Padur (~5.33 MMT, ~9.5 days). No gas storage. US SPR: 372 mn barrels. EU: 90-day mandate. Eight core sectors: 40.27% weight in IIP.

2 Mains:

* The core sector data confirms a systemic domestic slowdown, not a transient external shock. The deceleration from 7%+ to 2.8% over three years predates the West Asia energy crisis and cannot be

attributed solely to external factors. Energy sector contraction (16-22 consecutive months) reflects structural decline in domestic production from depleting reserves, not cyclical fluctuation. The absence of strategic gas storage is a critical infrastructure failure: India cannot buffer against supply disruptions or take advantage of consumption dips to build reserves, making the economy perpetually reactive to global energy markets.

* The editorial's alarm is reinforced by corroborating indicators: PMI near four-year lows, GST collections barely above inflation, and fertilizer contraction threatening kharif sowing. The only growth engine — construction-driven steel and cement — depends on government capital expenditure, which faces fiscal constraints from rising subsidies, defence spending, and revenue shortfalls. If government capex slows, the core sector has no alternative growth driver. The policy response must address both the energy structural decline (strategic storage, domestic exploration, renewables acceleration) and the demand-side weakness (rural distress, manufacturing revival, private investment stimulation).

1 Essay:

When three independent indicators — core sector, PMI, GST — all signal slowdown simultaneously, the economy is not sending mixed signals; it is sending one signal clearly. India's economic alarm bells have been ringing for over a year. The question is whether policymakers are listening, or whether the alarm fatigue of persistent optimism has made the warning inaudible. Use: Core sector, economic slowdown, energy, strategic reserves, fiscal policy.

Mains Q: *Analyse the editorial argument that India's core sector slowdown is systemic rather than transient. What structural reforms are needed to address the energy sector's prolonged contraction and the absence of strategic gas storage? (15M)*

GS2: Social Issues / Health / Demography / SRS / IMR

5. SRS 2024: Birth Rate, Infant Deaths Fall but Rural-Urban Gaps Persist

Source: *The Hindu (Ramya Kannan)* | ***Subject:*** *Social Issues / Health / Demography / IMR / Demographic Transition / GS2*

Context: The Sample Registration Survey (SRS) Bulletin 2024 provides the sharpest picture of India in the throes of demographic transition. Key findings (2014 vs 2024): Birth rate: 21 to 18.3 per 1,000 (down 2.7 points). Death rate: 6.7 to 6.4 per 1,000 (down 0.3 points). Infant Mortality Rate (IMR): 39 to 24 per 1,000 live births (down 15 points). Rural birth rate fell from 22.7 to 20.2; urban birth rate from 17.4 to 14.7. Rural death rate fell from 7.3 to 6.8; urban death rate went from 5.5 to 5.6 (slight increase). Urban IMR fell dramatically from 26 to 17 (down 9 points). Rural IMR fell from 43 to 27 (down 16 points — larger absolute drop but still far from single-digit target). Kerala has the lowest Natural Growth Rate (NGR) of 3.9, the rate at which a population increases or decreases due to births and deaths (excluding migration). Kerala also has a single-digit IMR (8), the lowest in the country. Tamil Nadu: NGR 4.8, IMR 11. Among smaller States, Goa: NGR 4.2, IMR 11. Among UTs, Andaman and Nicobar Islands: NGR 4.1, IMR 9. The overall performance is creditable, but the disappointment lies in the relatively worse rural performance. Rural areas drag the country's averages down substantially. The national target is to reduce IMR to single digits.

EXAMINER'S LENS

* Prelims: SRS Bulletin 2024. Birth rate: 21→18.3 (2014-2024). Death rate: 6.7→6.4. IMR: 39→24. Rural IMR: 43→27. Urban IMR: 26→17. NGR (Natural Growth Rate): births minus deaths, excluding migration. Kerala: lowest NGR (3.9), lowest IMR (8). Tamil Nadu: NGR 4.8, IMR 11. Goa: NGR 4.2, IMR 11. A&N: NGR 4.1, IMR 9. Urban death rate: slight increase (5.5→5.6). Source: SRS Bulletin, Registrar General of India.
* Mains: GS2 (Social Issues/Health). Demographic transition. IMR and rural-urban gap. State-wise disparities. Health infrastructure inequality. NGR and population stabilisation.
* GS4/Interview: India's IMR has halved in a decade — an achievement by any standard. But the rural IMR at 27 (vs urban 17) means a child born in rural India is 59% more likely to die before age one than a child born in urban India. When the accident of birth location determines survival probability, the inequality is not statistical; it is existential.

Key Points:

- The headline numbers are creditable: IMR dropping from 39 to 24 in a decade represents one of the largest sustained declines in India's demographic history. The birth rate decline (21 to 18.3) confirms India's accelerating demographic transition toward replacement-level fertility (2.1 TFR, which India reached at the national level in NFHS-5, 2019-21). The death rate decline is modest (6.7 to 6.4), reflecting the fact that India's death rate was already relatively low; further reductions require addressing non-communicable diseases and elderly care rather than infectious disease control.
- The rural-urban IMR gap (27 vs 17) is the most significant finding. While rural IMR fell by 16 points (43 to 27) — a larger absolute decline than urban (26 to 17, down 9) — the rural figure remains far from the national target of single-digit IMR. The gap reflects structural health infrastructure inequality: rural areas have fewer functional Primary Health Centres (PHCs), lower specialist availability, longer distances to district hospitals, and poorer neonatal care facilities. The IMR target cannot be achieved through national averages; it requires targeted rural health investment.
- The State-wise variation reveals two Indias. Kerala (IMR 8, NGR 3.9) and Tamil Nadu (IMR 11, NGR 4.8) have achieved near-developed-country health outcomes through decades of investment in primary healthcare, female literacy, and nutrition. Many northern States (implied by national averages being pulled down by rural performance) remain far behind. This connects to the delimitation debate: States that invested in health and education to achieve lower fertility and better outcomes may face seat loss in the next delimitation, while States with higher fertility and worse health indicators gain seats — creating a perverse incentive structure.
- The slight increase in urban death rate (5.5 to 5.6) is a quiet but important signal. It may reflect the rising burden of non-communicable diseases (NCDs: diabetes, cardiovascular, respiratory) in urban populations, the ageing of urban demographics, or deteriorating urban environmental quality (air pollution, lifestyle diseases). If confirmed in subsequent surveys, this signals a new challenge for India's health system: the epidemiological transition from infectious to non-communicable disease burden in urban areas.

STATIC CONNECT

▶ **Demographic Transition & Health Indicators**

* SRS: Sample Registration Survey. Conducted by Registrar General of India (RGI). Provides birth rate, death rate, IMR, maternal mortality, fertility estimates. Annual bulletin.
* IMR: Infant deaths per 1,000 live births. SDG target: below 12 by 2030. India: 24 (2024). National target: single digit. Kerala: 8 (lowest). Components: neonatal (0-28 days) and post-neonatal.
* Demographic transition: Stage 1 (high birth, high death), Stage 2 (high birth, declining death), Stage 3 (declining birth, low death), Stage 4 (low birth, low death). India: transitioning from Stage 3 to Stage 4.
* TFR: Total Fertility Rate. Replacement level: 2.1. India: 2.0 (NFHS-5, 2019-21). Below replacement in southern States. Above replacement in Bihar, UP, MP, Rajasthan.
* Delimitation and demography: Art 82. States with lower fertility (south) may lose seats; States with higher fertility (north) may gain seats. 131st Amendment Bill: seat expansion to mitigate.

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3 Prelims:

* SRS 2024: Birth rate: 21→18.3. Death rate: 6.7→6.4. IMR: 39→24. Rural IMR: 43→27. Urban IMR: 26→17. NGR: births minus deaths excluding migration.
* Kerala: NGR 3.9 (lowest), IMR 8 (single digit, lowest). Tamil Nadu: NGR 4.8, IMR 11. Goa: NGR 4.2, IMR 11. A&N: NGR 4.1, IMR 9. Urban death rate: slight increase (5.5→5.6).
* SRS: Registrar General of India. NFHS-5 (2019-21): TFR 2.0 (below replacement). SDG IMR target: below 12 by 2030. India: 24.

2 Mains:

* The SRS 2024 confirms India's accelerating demographic transition but reveals persistent rural-urban health infrastructure inequality. The rural IMR (27) being 59% higher than urban (17) reflects structural gaps in primary healthcare availability, specialist access, neonatal care, and nutrition services in rural India. Achieving single-digit IMR nationally requires targeted investment in rural health infrastructure, not reliance on national averages that mask spatial inequality. The Kerala-Tamil Nadu model — decades of investment in primary healthcare, female literacy, and nutrition — demonstrates that sub-national strategies can achieve developed-country outcomes within India's fiscal constraints.
* The demographic transition connects to multiple policy domains. First, delimitation: States with lower fertility (Kerala, Tamil Nadu, Andhra Pradesh, Telangana) achieved these outcomes through health and education investment but may face seat loss, creating a perverse incentive against demographic achievement. Second, the epidemiological transition: the slight urban death rate increase (5.5 to 5.6) signals the rising NCD burden that will define India's next health challenge. Third, population stabilisation: India's TFR below replacement (2.0, NFHS-5) means population

growth is increasingly driven by demographic momentum (large cohorts in reproductive age), not high fertility — a distinction critical for evidence-based population policy.

1 Essay:

When a child born in rural India is 59% more likely to die before age one than a child born in urban India, the IMR is not just a health statistic — it is a measure of the distance between India's two realities. The SRS 2024 shows that India knows how to reduce IMR (Kerala, Tamil Nadu have done it). The question is whether the political will exists to replicate these strategies in the States where the gap is widest. Use: Demographic transition, IMR, rural-urban gap, health infrastructure, delimitation.

Mains Q: *Analyse the SRS 2024 findings on India's demographic transition. How does the persistent rural-urban IMR gap reflect structural health infrastructure inequality, and what targeted interventions can bridge this gap? (15M)*