ELECTRICITY EMPLOYEES' FEDERATION OF INDIA (EEFI)
GENERAL COUNCIL MEETING
October 3rd - 4th 2026
Comrade Sukumar Sinha Manch
Comrade J. S. Rathore Nagar

Dear Comrades,

We are meeting in the First General Council of EEFI here in Kolkata today and tomorrow. The General Council was formed after the amendment to the EEFI Constitution at the 10th Conference.

We will discuss the political and economic developments and industrial and policy changes in the power sector since our last Conference. We will review the implementation status of our adopted tasks and frame our future course of action.

Presidential Address
Political-Economic Developments

Changing Geopolitical Situation – Energy at the Centre: Since our last conference, the geopolitical scenario has been changing very rapidly. This is also reflected in Indian politics and society.

The central fulcrum of this turmoil is certainly the control over energy. From Venezuela to Russia, and from Iran to China, politics is increasingly centred around energy resources.

The continuing US aggression over Iran and the retaliatory disruption of the Strait of Hormuz have demonstrated that control over energy routes remains a major instrument of geopolitical power. Around 20 million barrels of oil a day, roughly a quarter of global seaborne oil trade, normally passes through Hormuz. Nearly 19% of global LNG trade is also dependent on this route.As the standoff has continued through 2026, tracking data confirm the scale of disruption: crude flows moving directly through the Strait fell to an average of just 2.2 million bpd by August 2026, a roughly 95 percent drop in transit traffic since the US-Israeli strikes on Iran began on 28 February 2026, while total Gulf crude exports fell by nearly half, from about 17 million bpd in 2025 to roughly 9 million bpd. The EIA's first Global Energy Security Data report similarly recorded a nearly 30 percent year-on-year fall in crude and petroleum liquids moving

through the Strait in the first quarter of 2026 alone, to 14.6 million bpd.

The crisis has exposed the vulnerability of the global capitalist energy system. The IEA now expects global oil supply to fall by 5.7 million barrels/day in 2026. Refined-product and LPG exports remain almost 60% below February levels. Gas prices in Europe and Asia also remain substantially above 2025 levels.

At the same time, the energy transition is becoming a new field of competition among major powers. Global energy investment is expected to reach a record $3.4 trillion in 2026. About $2.2 trillion is expected to go to renewables, nuclear, grids, storage and electrification. This compares with $1.2 trillion for oil, gas and coal.

This is not simply a transition from fossil fuels to clean energy. It is also a struggle for control over technology, critical minerals, batteries, electricity networks, nuclear power and new industrial supply chains.

The central contradictions are clear. They are between public access to energy and private control over it. They are also between the old fossil-fuel-based energy system and the new renewable energy system. There is, further, a contradiction between the imperialist centres and the Global South over control of energy. The task is therefore to fight for affordable energy through public ownership, energy sovereignty and democratic control over the transition.

In this light, we will try to update the analysis of the international scenario placed before the 10th Conference.

Global capitalism at Crisis: Certainly, the present phase of world capitalism is characterised by prolonged economic stagnation, rising unemployment, simultaneous underconsumption and overproduction, and the growing influence of far-right and neo-fascist forces. The current global economic slowdown reflects the deepening systemic crisis of capitalism.

Failed Neoliberal economy – the manifestation of Crisis: Neoliberal globalisation has failed as an economic model – it has intensified inequality. It has weakened the bargaining power of labour. It has depressed wages despite rising productivity. It has

also created a crisis of overproduction, slow growth and unemployment.

World economic stagnation continues. The IMF projects global growth of 3.0 percent in 2026. At the same time, it warns that the outlook remains uneven. Renewed conflict and financial-market repricing pose significant downside risks. Global headline inflation is also projected at 4.7 percent for 2026. While the obscene concentration of wealth continues, the people are being thrown into poverty and joblessness.

At the same time, neoliberalism itself prevents governments from addressing this crisis through public expenditure or redistribution. This is because of the domination of global finance capital.

Crisis and Rise of the Far Right: Unable to resolve the economic crisis, monopoly capital increasingly relies on authoritarian and neo-fascist forces. These forces seek to divert popular anger through ultra-nationalism, communalism, racism and attacks on democratic rights, trade unions and the Left.

During the last six months, such forces have further consolidated their position globally. This is reflected in the strengthening of Donald Trump in the United States, the rise of the AfD in Germany, gains by Reform UK, the victory of the PiS-backed candidate in Poland, the expansion of Romania's AUR, and the continued consolidation of authoritarian regimes under Javier Milei in Argentina and Benjamin Netanyahu in Israel.

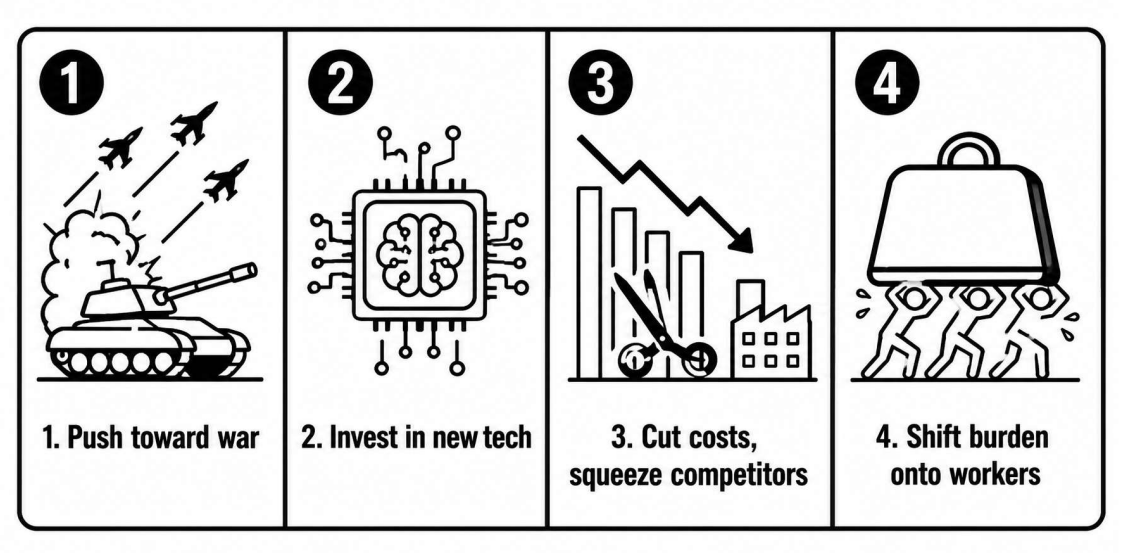
In the September 2026 elections in Mecklenburg-Western Pomerania, the AfD secured 38.3 percent of the vote and emerged as the largest party. Reform UK won more than 1,000 council seats in the May 2026 UK local elections.

The rise of the far right must be understood as part of the crisis response of neoliberal global capitalism. This system has failed in every sphere of human life and society. But, unlike classical fascism, however, contemporary neo-fascism remains tied to neoliberal policies. It is therefore incapable of overcoming even the crisis for a temporary period.

Left Resurgence – Confirming the Path Forward: Alongside the far right's advance, this same period has produced sharp evidence that working people rally decisively behind the Left whenever it speaks directly to their daily material concerns with

clarity and conviction. A clear pattern has emerged across continents: in Norway's September 2025 election, the Labour-led left bloc held off a surging Progress Party to retain government; in New York, Seattle and a string of city and Congressional primaries across 2025–26, left and democratic-socialist candidates - most prominently Zohran Mamdani in New York - won based on bread and butter issues rather than defensive centrism; and most strikingly, in Germany's own September 2026 state elections - held the same day the AfD topped the poll in Mecklenburg-Western Pomerania - Die Linke won Berlin outright with 25.7 percent of the vote, more than doubling its 2023 tally and finishing well ahead of Chancellor Merz's CDU, on a campaign built almost entirely around rents and the cost of living, sweeping the under-25 vote in the process. **Wherever the Left has matched the far right's simple messaging with an equally sharp and immediate class message, it has found not indifference but a mass constituency ready to mobilise. The lesson for us is clear: the ground for a Left resurgence exists across continents; it must be seized through patient, day-to-day organising around livelihood issues, not ceded to the Right by default.**

Four capitalist ways to manage Crisis: Capitalism seeks to overcome its crises through four principal mechanisms.



First, it intensifies imperialist wars to sustain the war economy and generate monopoly profits.

Second, it invests in new technologies and high-profit industries, despite their limited employment potential.

Third, it intensifies competition through higher productivity and cost-cutting. This leads to the closure of smaller enterprises and worsening conditions for workers.

Fourth, it shifts the burden of the crisis onto the working class through retrenchment, unemployment, wage cuts and increased work intensity. It also weakens labour rights and diverts public resources to protect and promote corporate profits.

All these issues were discussed in our 10th Conference document. Here, we will update the developments of the recent period.

The recovery strategy unleashing War: The growing aggression of US imperialism is reflected in tariff wars, military conflicts and attempts to tighten control over the global oil trade. Certainly, this aggression arises from the deepening crisis of US-led capitalism.

As the world's largest debtor, the United States depends on the dominance of the dollar and the oil-dollar system. But both are becoming increasingly fragile. Consequently, US imperialism is entering a new phase of recolonisation of the Global South.

This is being pursued through wars, unequal trade agreements, sanctions and financial pressures. The objectives are to secure markets, favourable conditions for foreign capital and strategic interests. The burden of this crisis is shifted onto workers, peasants and small producers of Global South countries.

US imperialism has prolonged the wars in West Asia and Ukraine to sustain its war economy, control energy resources, expand its strategic influence and pursue aggressive trade wars.

These developments reflect the broader systemic crisis of capitalism. Certainly, the deepening crisis of US-led capitalism has driven imperialist wars rather than wars creating the crisis. It reasserts that, as analysed by the 10th Conference, capitalism continually seeks to overcome its crises through war, militarisation and imperialist aggression.

But instead of recovery, the war has further exposed and intensified the structural crisis of capitalism. This crisis is marked by declining profitability, extreme concentration of capital, speculative finance and mounting private debt.

Energy, Hormuz and Imperialist Aggression: The growing importance of energy in the conflict has been demonstrated by the disruption of the Strait of Hormuz. The crisis has affected not only oil and gas prices, but also shipping, insurance, transport and industrial production. This shows how control over energy routes has become inseparable from contemporary imperialist attacks.

The burden of this crisis falls disproportionately on poorer, energy-importing countries. It results in inflation, factory closures, unemployment and rising insecurity for workers. At the same time, energy corporations, defence companies and financial speculators accumulate extraordinary profits. Monopoly-finance capitalism enables corporations to pass rising costs of energy, freight, insurance and war risks entirely onto workers and consumers. This further exposes the exploitative character of the neoliberal capitalist order.

US Tariff War and Global Trade – another weapon of shifting the Burden: Tariff war is another mechanism through which US imperialism seeks to shift the burden of its crisis onto the working class of both the Global North and the Global South.

The Trump administration has sharply expanded tariffs and used trade laws to pressure several countries, including India, China, the European Union, Vietnam, Bangladesh and Mexico. At the same time, it is pushing countries towards unequal trade agreements and Free Trade Agreements.

Although projected as measures to create jobs in the United States, these protectionist tariff impositions have increased prices. They have also reduced investment and employment and adversely affected workers in both importing and exporting countries. The heaviest burden falls on export-dependent developing countries, particularly garment-producing nations. Women workers are among the worst affected.

New Bet of Capitalism in Crisis - Artificial Intelligence: Regarding the role of new technology, the question arises whether Artificial Intelligence can resolve the crisis of capitalism.

It was noted that although corporate profits have recovered since 2025, the gains are overwhelmingly concentrated in a handful of AI-driven corporations. Nvidia and major hyperscalers such as Microsoft, Alphabet, Amazon and Meta account for the bulk of

profit growth and technology investment in the United States. The scale of this concentration is reflected in investment.

Capital expenditure by five major technology companies exceeded $400 billion in 2025. It is expected to rise by another 75 percent in 2026. The IEA notes that this expenditure is now larger than global investment in oil and natural-gas By their Q2 2026 earnings (late July 2026), Amazon, Alphabet, Microsoft and Meta were guiding combined 2026 capital expenditure of roughly $725–730 billion - a 77–78 percent jump from about $410 billion in 2025 - with Amazon alone at around $200–220 billion. Goldman Sachs now projects a combined $5.3 trillion in hyperscaler capex between FY2025 and FY2030, and consensus already points to the "big four" surpassing $1 trillion in 2027. Meta's decision to raise its own 2026 guidance to $125–145 billion triggered a 9 percent single-day fall in its share price in mid-2026 - an early sign of investor unease with the scale of this speculative build-out.

Interestingly, this AI boom is sustained through circular cross-investment, rising corporate debt and increasing dependence on equity markets rather than realised profitability. This makes it highly fragile.

Despite massive planned investments in AI infrastructure, actual returns remain low. Losses continue to mount. Private credit exposure has also expanded rapidly. Any slowdown in expected AI returns could trigger a major financial crisis. It could wipe out trillions of dollars of wealth and push the world economy into recession.

Although AI is expected to improve productivity, economy-wide gains have yet to materialise. Such gains are likely to remain concentrated among a few dominant corporations. This will widen the gap between large and small firms.

Rather than resolving the crisis of capitalism, it intensifies its contradictions. It increases investment costs, reduces employment and exhibits the features of a speculative bubble. This would expose AI as another temporary avenue for monopoly capital rather than a solution to the systemic crisis of capitalism.

AI and Energy – Old and New: The energy requirement of this model is becoming a major economic issue. Global data-centre electricity consumption grew by 17 percent in 2025. Electricity

use by AI-focused data centres grew by 50 percent. The IEA projects that total data-centre electricity consumption could nearly double from 485 TWh in 2025 to around 950 TWh by 2030.

So, the AI-led growth model requires continuous investment in chips, data centres and infrastructure. This places enormous pressure on electricity, land and water resources. While the rapid expansion of data centres is creating competition for grid capacity, electricity and investment, the communities in several regions are raising concerns over affordability and environmental impacts.

The most significant new element is the energy-AI connection. The 2026 energy crisis, the strategic importance of Hormuz and the rapidly rising electricity requirements of AI make energy control an increasingly important part of the current phase of imperialist competition.

AI and Employment: Under capitalism, productivity gains are used primarily to reduce employment, intensify labour exploitation and finance further AI expansion. At the same time,

it generates only limited long-term employment. AI-related job losses increasingly take the form of hiring freezes and workforce reductions. Major technology corporations are also diverting savings from layoffs into AI investment.

Overall, the concentration of profits, financialisation and speculative AI investment deepen systemic instability rather than strengthening capitalism.

Wars and trade conflicts are also driving stagflation and slowing growth. They are increasing unemployment and reducing remittances. They are also raising fertiliser and food prices and intensifying the cost-of-living crisis. At the same time, governments continue to protect corporate profits through state support and public resources.

The Real State of Workers and People: While sections of monopoly capital linked to technology and strategic industries continue to expand, many workers, small producers and developing economies bear the costs of war, tariffs, inflation and restructuring.

Workers in the developed countries face stagnant wages because capital shifts production to low-wage countries, while workers in developing countries remain trapped by vast reserve armies of labour. Productivity continues to rise, profits continue to grow, but wages remain stagnant.

As a result, workers' purchasing power declines, goods can be produced but cannot be sold, demand remains weak, and capitalism becomes trapped in a cycle of overproduction, slow growth, and unemployment.

India – Receiver of the Burden: Against this global backdrop, US imperialism is attempting to shift the burden of its crisis onto countries of the Global South such as India. At the same time, the Modi government is passing that burden onto the Indian people in the interests of big corporate houses.

India, Energy and West Asian War: India's neoliberal growth model remains structurally dependent on imported energy, volatile global finance and suppressed domestic demand. The crisis has exposed these structural weaknesses.

They are reflected in the sharp depreciation of the rupee, depletion of foreign exchange reserves, rising current account pressures, growing import dependence and a persistently high trade deficit.

India also remains highly dependent on imported crude, with import dependence around 88%. Brent crude was still around $100 per barrel in September. This demonstrates the continuing exposure of the Indian economy to external energy shocks.

The West Asia crisis has already altered India's oil-sourcing pattern. In August 2026, India's Russian crude imports fell by 16.5 percent to about 2.1 million barrels per day. Indian refiners increasingly turned towards Middle Eastern supplies amid the West Asia conflict and pressure from US sanctions.

This demonstrates how geopolitical conflicts and imperialist pressure directly affect India's energy security and external balance.

The direct impact of the West Asia war on Indian workers is prominent. It is reflected in rising oil prices, inflation, the declining value of the rupee, falling remittances and growing

insecurity of nearly 9–10 million Indian migrant workers in the Gulf.

The economic consequences of the war are being shifted onto the working class. At the same time, imperialist powers, financial speculators and large corporations continue to protect and expand their profits.

Trade Agreements and Impact on Indian Workers: Along with this, the impact of the US tariff war and subsequent Free Trade Agreements has already started to have severe impacts on Indian workers. Tariff attacks, together with the West Asia war, have simultaneously increased fuel, freight and raw material costs. This is severely affecting employment in textiles and apparel, gems and jewellery, seafood, handicrafts, auto components and engineering goods. Although multinational corporations continued to report high profits, workers and small producers faced growing insecurity.

The pressure is particularly visible in energy-intensive industries. In September 2026, the United States also finalised significant duties on solar cells and panels from India. This shows that even the renewable-energy sector is increasingly being drawn into trade and industrial competition between major economies.

The Free Trade Agreements with the European Union and the United States further deepen unequal integration of India into the global economy. While these agreements provide limited opportunities for labour-intensive exports, they open India's higher-value manufacturing, agriculture, technology and energy markets to foreign capital. This threatens employment in sectors such as automobiles, steel and aluminum. The developed countries retain technological dominance and capture the benefits of skilled labour. India's gains remain concentrated in lower-value production and export activities.

Crisis of Consumption, Employment and Wages: India's own industrial growth remains uneven. Employment generation remains weak. The "Make in India" strategy has failed to promote labour-intensive industrialisation. The official Q1 FY2026-27 GDP release (31 August 2026) in fact reported an even higher 7.8 percent real growth figure, with nominal GDP growth of 10.3 percent, which the Prime Minister and Finance Minister publicly celebrated as proof of the economy's resilience to the West Asia

shock. But the figure has itself become the subject of sharp controversy, with economists pointing to unexplained base-year revisions and an implausible negative manufacturing-inflation deflator used to arrive at the headline number - reinforcing rather than answering the doubts about whether the GDP series reflects the lived reality of workers. But, August 2026 CPI inflation was 4.82% and food inflation was 5.95%. Unemployment was 5.0%, with urban unemployment at 6.8%. Certainly, the GDP data is not reflecting the reality of our country.

The crisis of consumption, since the 10th Conference, has further deepened. Pressure on household purchasing power remains significant. Rural consumer inflation was higher at 5.23 percent. This indicates the continuing pressure of essential commodity prices on rural households. Wholesale inflation was considerably higher at 9.92 percent. Fuel and power prices rose 22.93 percent year-on-year. This divergence between consumer and wholesale prices indicates continuing cost pressures on production and households.

Even relatively better-paid sections of the working class are experiencing declining incomes and reduced purchasing power. This is leading to a fall in the consumption of even comparatively high-value goods. It also exposes the continuing contradictions of India's neoliberal growth trajectory.

The introduction of the revised Consumer Price Index with a lower weight for food may understate inflation. This is despite the fact that food prices and the cost of essential commodities continue to rise faster than overall inflation. Inflation has disproportionately affected rural and informal workers. These workers lack regular wage revisions and dearness allowance. This has resulted in stagnant or declining real wages despite nominal wage increases.

The contradiction between high aggregate GDP growth and inadequate generation of secure, well-paid employment therefore remains central to the character of India's growth model. The Prime Minister's call for austerity reflects India's deepening economic vulnerability amid global instability. Especially, at a time when mass consumption is already under severe stress, household debt has reached historically high levels. Savings have sharply declined.

Inflation in food, fuel, housing, healthcare and education has eroded real incomes. This is forcing large sections of workers and lower middle classes to depend on debt for basic consumption. The recovery has remained highly unequal. It has benefited upper-income sections, while productive sectors and working-class consumption continue to lag.

On the other hand, corporate profitability continues to grow on the basis of tax concessions, privatisation, labour flexibilisation and production-linked incentives. The continuing rise in prices has further intensified the wage crisis.

Employment conditions have deteriorated, with unemployment rising during 2026, particularly among youth and women. The withdrawal of MGNREGA has taken away a very important safety net for rural workers. At the same time, the rapid expansion of gig and platform work has increased informalisation and employment insecurity without adequate labour rights or social security.

Although the ILO adopted binding international standards on decent work in the platform economy, the Government of India abstained from supporting the Convention and has yet to introduce comparable protections.

In this situation, the latest PLFS data require a more nuanced assessment of the employment situation. Overall unemployment declined to 5.0 percent in August 2026. The labour force participation rate increased to 55.6 percent. However, urban unemployment rose to 6.8 percent, compared with 4.1 percent in rural areas. This shows the continuing problem of quality employment. The overall female labour-force participation rate was only 34.8 percent.

The data therefore indicate that the headline improvement does not remove the continuing problems of inadequate participation, urban unemployment and the quality and security of employment.

Corporate Concessions, Monetisation, Privatisation – Centralisation of Capital and Burden to People: Faced with the impact of tariff wars on sections of Indian capital, the government has responded with further pro-corporate measures. These include tax concessions, production-linked incentives and customs duty exemptions. Monopoly capital continues to

centralise wealth by shifting the burden of the crisis onto MSMEs and workers.

In between this, the Modi government has launched the National Monetisation Pipeline (NMP) 2.0, disinvestment and large-scale land acquisition as a further intensification of neoliberal policies. Public infrastructure across strategic sectors is being transferred to private corporations through the PPP model and long-term leases. This is accompanied by increased PSU disinvestment and equity dilution.

Simultaneously, industrial land banks and new industrial parks are facilitating large-scale transfer of land. This is leading to the displacement of farmers, agricultural workers, Adivasis and rural communities.

A fresh offensive has been launched against the working poor through eviction drives targeting hawkers, street vendors and slum dwellers. The drive began in West Bengal after the elections. This attack has spread to Uttar Pradesh, Delhi, Karnataka, Assam, Haryana and other states. Under the guise of development and urban renewal, governments are destroying the petty-production economy. They are grabbing land and public spaces and displacing the working poor in the interests of big corporates.

At the same time, closures of private companies, weak industrial growth and the assembly-based character of "Make in India" expose the growing contradictions of Indian capitalism. To protect monopoly profits, the government is transferring the burden of the crisis onto the people.

This is being done through cuts in social expenditure, subsidy reductions, wage restraint, asset monetisation, privatisation of public services and trade agreements that threaten Indian agriculture and small producers.

AI Policy and Electricity Demand in India: The Modi Government's AI strategy, through the IndiaAI Mission, the Union Budget and various state policies, provides generous incentives to attract global technology companies to establish AI data centres in India.

India's data-centre capacity, electricity demand and water consumption are projected to grow rapidly. However, these investments generate very limited permanent employment. They

also place enormous pressure on land, water and power resources. Unlike several developed countries that are slowing data-centre expansion because of environmental and infrastructure concerns, India is aggressively competing for such investments despite resource constraints.

The energy requirement of this model is becoming an important new issue. The IEA expects India's electricity demand to grow by an average 6.4 percent annually during 2026-30. This would add more than 570 TWh to annual consumption. Data centres are becoming one major source of India's electricity demand.

There does not exist a comprehensive environmental policy for data centres. India is not developing indigenous AI capabilities. It is merely becoming a low-cost provider of land, energy and digital infrastructure for multinational corporations. This creates an increasingly important question: who controls and benefits from the additional power infrastructure?

AI and Employment in India: AI-led restructuring has already resulted in large-scale job losses, reduced recruitment of young engineering graduates and expansion of insecure gig and platform work. At the same time, a small layer of highly skilled AI professionals secures better-paid employment.

In the absence of a comprehensive policy for worker protection, alternative employment and regulation of gig work, AI-driven growth is likely to intensify unemployment, inequality and corporate concentration rather than benefit the working class.

The international AI race is increasingly linked with the struggle

for control over electricity, semiconductors, data infrastructure and critical minerals. This makes AI not merely a technological question. It is also an emerging field of competition among major powers and monopoly corporations.

Transfer of Burden to Indian Agriculture Sector: The Modi government has made major concessions to the United States on issues affecting farmers' interests, energy security and strategic policy. This is increasing India's vulnerability to global oil shocks. At the same time, the United States has continued to use tariff and trade measures to influence India's economic choices.

Farmers are increasingly being pushed out of agriculture through various forms of attacks, such as electricity price increases, the

Seed Bill, FTAs and many more. Agri-workers are facing policy attacks such as withdrawal of MGNREGA and the introduction of VB-GRAM(G). These measures are expanding the reserve army of labour and exerting downward pressure on wages.

Over and above these, Indian agriculture is confronting a deepening climate and economic crisis this year. The 39.8% rainfall deficit in June, together with the IMD's forecast of a below-normal monsoon, has raised fears of drought. The diversion of millions of tonnes of rice and maize for ethanol blending is tightening foodgrain supplies. It is raising food and feed prices and benefiting large distilleries and corporate agribusiness at the cost of farmers, workers and consumers.

The agrarian crisis is being further intensified by developments in West Asia. The Gulf supplies 20–30% of India's urea imports, around 30% of DAP imports and nearly half of the LNG used for domestic urea production. Disruptions in shipping and supply chains have therefore sharply increased fertiliser prices and input costs. Combined with climate change and a weak monsoon, the West Asia crisis has created a triple assault on India's peasantry and working people.

Labour Codes and the New Labour Regime: The last six months have marked a new phase of class attack with the implementation of the Labour Codes. This is ushering in a new regime in labour jurisprudence. While governments are aggressively implementing the Codes, the Indian working-class movement is developing its counter-strategies.

The implementation of the Labour Codes, described even in the Economic Survey as a shock absorber for the economy, is aimed at weakening labour protections. It also seeks to reduce inspections, extend working hours, undermine trade union rights and depress wages across both organised and unorganised sectors.

We must note that despite the old stricter labour jurisprudence, workers are dying across the country in industrial accidents due to sheer failures and lapses in safety protocols. The increasing attacks on workers' safety were exposed by the boiler explosion at Vedanta's thermal power plant in Chhattisgarh, the molten steel accident at Visakhapatnam Steel Plant, the ammonia gas

leak in a shrimp processing factory in Tamil Nadu, the rat-hole mine explosion in Meghalaya, the explosives factory blast in Nagpur, the warehouse collapse in Kolkata and the quarry accident in Karnataka. There have been many more such incidents.

This should be seen along with the increasing criminalisation of trade union activities. At the same time, even labour law violations by employers are effectively decriminalised. In this situation, the implementation of the Labour Codes will mark the beginning of a murderous labour regime. This requires EEFI to reorient its work and develop an appropriate strategy to confront the new situation.

So, the deepening global crisis is being attempted to be shifted onto the Indian people through austerity, withdrawal of labour protections, intensified exploitation, privatisation, and repression – But there exists another weapon of diversion – Communalisation!

Communal Polarisation – the Diversionary Tactics: The ruling class is further trying to manage growing distress by creating communal polarisation and diverting attention from livelihood issues. Defending communal harmony, public services, wages, employment and workers' rights is therefore an integral part of the struggle against imperialism and neoliberal policies.

On the political front, BJP has further consolidated its electoral position by winning West Bengal and strengthening itself in Assam. The defeat of the LDF government in Kerala is a serious setback for the working-class movement. However, the more serious challenge is the aggressive political and ideological penetration of the BJP-RSS. Its neo-fascist project seeks to divide working people through communal polarisation, attacks on minorities and organised hate campaigns. Countering this politics through sustained political and ideological campaigns was identified as a major task before the organisation.

SIR – the Murder of Indian Parliamentary Democracy: The Special Intensive Revision (SIR) process is certainly an instrument to disenfranchise large sections of the exploited and oppressed. It can deny access to welfare benefits and weaken democratic rights. Concerns have also been expressed over the role of the Supreme Court in matters relating to the SIR.

The controversy surrounding Chief Election Commissioner Gyanesh Kumar has further deepened concerns over the independence, transparency and functioning of the Election Commission. A recent investigation by The Indian Express reported that Election Commissioners Sukhbir Singh Sandhu and Vivek Joshi had formally raised objections at least 14 times over ten months regarding decisions connected with the Special Intensive Revision. These included changes in voter-registration procedures, deletion and restoration of names and the centralisation of electoral-roll databases. They reportedly questioned whether some decisions had been taken without their knowledge or approval.

The controversy has nevertheless generated demands for greater transparency and accountability in the functioning of the Commission. Opposition parties have also demanded action against Gyanesh Kumar.

Along with this, the High-Level Commission on Demographic Change was constituted without demography experts. There have also been developments relating to citizenship. Reports of people in West Bengal being pushed towards the Bangladesh border for lack of documents, and the claim that a passport is not proof of citizenship, are also part of the present controversy.

All of these are seen as parts of a broader political design to redefine citizenship in line with the RSS agenda, disenfranchise vulnerable sections and advance the project of a Hindu Rashtra.

The BJP's efforts to weaken and split the opposition, attract opposition MPs and push delimitation to maximise its electoral advantage are actually reflecting its growing dependence on political manipulation rather than public confidence.

Resistance of Workers and Popular Forces: In this situation, the resistance has also started mounting. The nationwide General Strike (Bharat Bandh) on 12 February 2026, organised by the Joint Platform of Central Trade Unions with the unconditional support of the Samyukta Kisan Morcha (SKM), demonstrated the growing resistance of working people against the Modi government's anti-people policies.

The strike demanded the withdrawal of the four Labour Codes, the Draft Electricity (Amendment) Bill, the Draft Seed Bill and the SHANTI legislation. It also demanded restoration of the original

MGNREGA employment guarantee and scrapping of the VB-G RAM G scheme. EEFI has remained in the forefront of all these struggles.

The Student Movement: We must take note of the deepening crisis faced by students and youth. Their struggle on the issue of the NEET question paper leak affected over 22 lakh students. The growing distress has also led to student suicides.

Instead of addressing these concerns, the government has resorted to repression. SFI, DYFI and other Left and democratic student-youth organisations have consistently led struggles on these issues. And the widespread response to the "Cockroach Janata Party" campaign following controversial remarks by the Chief Justice shows the anguish within the Generation-Z. This struggle to defend education, democratic rights and the future of the youth is obviously an inseparable part of the broader struggle to defend democracy.

The workers' resistance across the country: We must very seriously understand that this Gen-Z upsurge was not the first.

It was preceded by the upsurges of workers across the country, especially in North and Central India. Despite intensified attacks, workers, particularly non-regular industrial workers, have entered a new phase of resistance.

From Kerala to Kashmir, workers are coming to the streets. In industrial clusters across Tamil Nadu, Telangana, Maharashtra and Karnataka, struggles are going on in sectors ranging from IT to manufacturing. One can refer to the struggles of private hydel power workers, ambulance drivers, scheme workers, hawkers and street vendors, electricity workers and many more sectors.

But the developments in the Hindi-speaking states are very significant and need to be dealt with in detail.

The upsurges in North and Central India: One must take note that the student-youth Gen-Z movement was actually preceded and accompanied by another Gen-Z upsurge: the heroic struggle of the North Indian industrial workers, most of whom belong to Generation Z, which began at the beginning of this year and is still continuing. It shows that the working class is also on the rise along with the broader popular forces.

Minimum wages in January 2026 ranged from Rs 7,722 in Rajasthan to around Rs. 9,000–11,000 in most states. Workers were routinely denied statutory wages, overtime, bonuses and social security. They were also forced to work 12-hour shifts under hazardous conditions. The West Asia war sharply increased LPG prices. This has made even one cooked meal a day unaffordable for many workers.

This has pushed thousands of predominantly young, non-regular workers employed in core production processes to the forefront of militant struggles. Tens of thousands of previously non-unionised workers have come onto the streets. They have won wage revisions of Rs 2,000–3,000 in several states after more than a decade.

Following the recent wave of spontaneous workers' protests, managements and the police have openly joined hands to suppress trade union activities. Industrial centres such as Gautam Buddha Nagar, Manesar, Neemrana and Faridabad have witnessed increasing surveillance and repression. This reflects an organised class offensive by the ruling class. And so, it needs to be responded to with greater determination, organisation and conviction.

The objective should be to transform the present situation into an opportunity for strengthening the working-class struggle across the country. The upsurges are developing new forms of struggle extending beyond individual factories to entire industrial clusters and value chains. These struggles reflect not merely a crisis in workers' survival. They reflect the broader crisis of capitalist reproduction itself.

This requires the organisation to intervene effectively and transform the crisis into greater class consciousness towards social change.

Organisational Tasks and Occupy Delhi: Now, in the face of these multi-faceted attacks, increasing state surveillance and the threat of union de-registration under the Labour Codes, strengthening the organisation has become an urgent task.

The General Council Meeting is thus called for consolidating unions and revitalising union committees. It must involve all members in struggles. It must also take class politics to the workers and maintain a visible presence on the streets.

The recent spontaneous upsurges of workers show that the working class is also on the rise along with the broader popular forces. On the other hand, the principal lacuna on our part lies in our inability to imagine a heightened form of confrontational struggle.

Political discontent has grown. New movements have repeatedly demonstrated remarkable courage and imagination. However, much of this energy remains fragmented and episodic. It has not yet been translated into sustained political power.

It emphasises the need to reorient and strengthen EEFI as the principal instrument of the Indian electricity workers. EEFI must be capable of channelising the growing discontent of the masses against the decaying capitalist system into an organised movement for social transformation.

The objective is to convert the present crisis into heightened class consciousness and social change, in accordance with the perspective adopted by the 10th Conference. In this line, the EEFI Office Bearers' Meeting has conceived a heightened form of struggle along with the other segments of workers - the Occupy Delhi Movement - from 1st December 2026 onwards.

It is a new form of struggle to reclaim our position in social discourse with heightened zeal and might. One lakh workers will assemble in Delhi and march towards Parliament. Every struggle of workers against capital today forms part of the broader anti-imperialist struggle. It challenges globally integrated value chains and monopoly capital.

EEFI GC calls for uniting the struggles of electricity workers across regions, sectors and industries. It also calls for further combining livelihood struggles with the fight against communal division.

Let's make this a historic struggle appropriate to the urge and mood of the Indian workers! Let's make our presence visible! Let's bring labour to the centre of discourse in society!