

# 'The US will work with whoever forms the next government'

The world is closely watching as Bangladesh heads towards a defining election on February 12 amid global geopolitical shift. How are global and regional actors such as the US, China, India and Pakistan looking at it? What is going to change for Bangladesh? Michael Kugelman, senior fellow for South Asia at the Washington-based think tank Atlantic Council, shares his views in an email interview with Porimol Palma, diplomatic correspondent at The Daily Star.

**How is the Trump administration looking at the upcoming election in Bangladesh?** The Trump administration, unlike the Biden administration, does not view foreign policy through a values-based lens. This means issues such as democracy and human rights are not likely to drive this administration's foreign policy thinking. As a result, when it comes to an election in Bangladesh, the administration is unlikely to take a strong stand on the need for a free, fair and credible election, even though it may state this publicly since such a position is not controversial and generally aligns with what much of the Bangladeshi population would want to see. The Trump administration will be keen to work with whatever government emerges victorious from the election.

For the Trump administration, the primary concern is overall stability. It hopes that the election will be peaceful, or at least relatively peaceful, and that any election-related violence—whether before the election, on election day, or afterwards—will be minimised. In particular, it seeks to ensure that such violence does not imperil US interests or assets in Bangladesh.

**What are the US's key priorities then?**

Ultimately, the US wants to work with Bangladesh on a number of issues, many of them trade-related. The bottom line is that the Trump administration will be perfectly comfortable with whoever leads the next government, so long as that government is willing to engage with Washington, do business with Washington, and—most importantly from Washington's perspective—discuss lowering tariffs and purchasing more American goods. This reflects the administration's highly commercial and transactional approach to



Michael Kugelman

foreign policy.

**There are perceptions that the US favours Jamaat-e-Islami. Is it true?**

It is true that there have been perceptions that the US is, for some reason, favouring Jamaat, perhaps due to reports such as one *Washington Post* story. However, the bottom line is that the US government does not favour any particular political party. It will work with whichever party emerges victorious from the election.

A core part of US diplomacy is engagement with all key actors and stakeholders. This is why senior US diplomats meet with leaders from different political parties. It should not

be surprising that US diplomatic officials have engaged with Jamaat leaders, as Washington recognises—correctly—that Jamaat has political clout and electoral potential. It is a party capable of securing a significant number of votes, and US diplomats acknowledge this reality.

Accordingly, Washington seeks to keep channels of engagement open with Jamaat so that, if Jamaat were to emerge victorious or even assume a key role in the opposition, the US would be able to engage effectively. However, engagement with a particular political party should not be mistaken for endorsement. This is simply how US diplomacy operates: it engages with all key stakeholders.

**The Bangladesh-India relations have been strained since the July uprising. What should it look like in the future?**

India suffered a significant strategic loss when Sheikh Hasina was ousted. It has been very

be influenced by the types of actors that India feels could threaten its interests.

**Does India favour any political party?**

India is likely to be concerned from political and security standpoints if Jamaat-e-Islami wins the election, but would be comfortable with a BNP-led government. The BNP no longer has an alliance with Jamaat, and the party has expressed its interests about wanting to engage with India.

**How would the India-Bangladesh relations be in the coming days?**

I think India will be ready to pick up the pieces of what has been a shattered relationship with Bangladesh. New Delhi obviously would have preferred the Awami League to be leading the next government. However, it also recognises that the Awami League is not going to be in the political scene in Bangladesh for quite some time. Thus, it is not going to try to push for

main parties coming to power, but a Jamaat victory would be ideal for it. Pakistan would clearly be the only regional player that would most prefer a Jamaat government. However, it would be okay for Pakistan if there is a BNP-led government, but it would be eager to ensure that BNP does not try to patch Bangladesh's ties with India because it may diminish Islamabad's recent efforts to work towards a better relationship with Dhaka.

**What about China? How is it looking at the election?**

China will watch the election closely as it views Bangladesh as a key trade and investment partner. For Beijing, political stability in Dhaka is key due to its investments in the region. Beijing wants to ensure that the law and order challenges and other security concerns in Bangladesh would not impact Chinese interests on the ground.

**The newly-appointed US ambassador to Bangladesh, Brent Christensen, recently said he would work to reduce Chinese influence in Bangladesh. What does that mean?**

I think it means that the US wants Bangladesh to rely less on Chinese capital and infrastructure development. This may suggest a willingness to bring US investment, including potentially from the US International Development Finance Corporation, into Bangladesh. There may also be a suggestion that the US will want to continue to push to complete a Boeing aircraft deal with Dhaka.

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uncomfortable with the interim government. India felt Bangladesh was heavily influenced by Jamaat and other religious actors that, in India's view, threaten its interests. Now, it hopes the election will produce a government that is willing to engage with India and will not

ways to bring the party back. It would accept a government led by the BNP and would be willing to work with it.

**What about Pakistan?**

Pakistan will be happy with either of the two

## New energy policy, same challenges

Bangladesh needs an inclusive approach



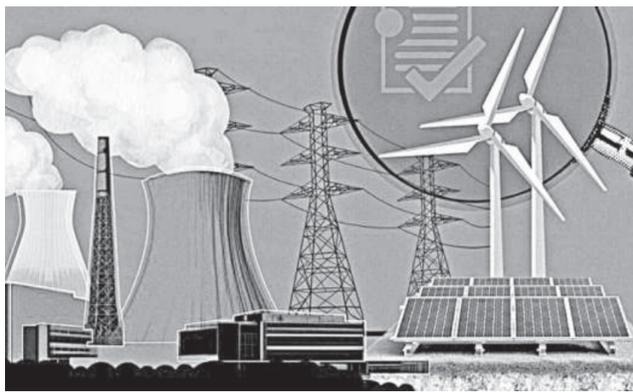
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To ensure energy security and boost economic growth while reducing emissions by 2050, the Bangladesh government devised an Integrated Energy and Power Master Plan in 2023 (IEPMP 2023). The IEPMP 2023 immediately drew criticism for its inflated power demand projections, a highly import-dependent fossil fuel pathway, and a limited role for renewable energy. Stakeholders also raised concerns over the government's significant reliance on foreign consultants in drafting the IEPMP 2023 rather than incorporating the suggestions of local experts. Previous power master plans approved between 2010 and 2018 have received similar criticism and ultimately contributed to persistent structural weaknesses in the country's energy and power sectors.

The interim government of Bangladesh, factoring in these concerns, decided to revisit the IEPMP 2023 and draft a blueprint for the energy and power sectors to place them on a more sustainable path. However, the announcement of the draft Energy and Power System Master Plan 2025 (EPSMP 2025) on January 7, 2026, with limited consultations, confused stakeholders and experts. While the draft EPSMP 2025 seeks to significantly increase renewable energy capacity, its challenges remain largely similar to those of previous master plans, which prioritised liquefied natural gas (LNG) and coal. The reliance on carbon capture and storage (CCS) also poses significant technological and financial risks.

The interim government organised a meeting with selected stakeholders to discuss the draft EPSMP 2025 on February 8. However, this does not guarantee that all key experts' and important stakeholders' suggestions will be reflected in the final version. A hasty approval of the plan risks the need for a revision in a few years, delaying the country's energy transition. Therefore, the next government should draw upon local technical expertise and key stakeholder inputs through an inclusive



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consultation process before finalising the EPSMP 2025.

**A decade and a half of costly dependence on imported fossil fuels**

Bangladesh's high demand for natural gas, combined with a perceived decline in local supply, pushed the government to approve a new Power System Master Plan 2010 (PSMP 2010), with the objective of diversifying fuels in its energy mix. While the PSMP 2010 was built on three core objectives—economic development, energy security and environmental safeguards—it ultimately set the course for a fragile, import-dependent and carbon-intensive power system through 2030 (coal: 50 percent [import 20 percent]; gas: 25 percent; oil: five percent; nuclear, renewable energy and cross-border import: 20 percent). The PSMP 2010 also laid the foundation for an accelerated power system capacity expansion.

Subsequent master plans, such as PSMP 2016, the revised PSMP 2016, and the IEPMP 2023, again failed to meet expectations. A closer inspection shows that these master plans, also formulated without sufficient consultations, raised the power sector's import dependence

including off-grid systems and most of the solar home systems are now non-functional.

**The EPSMP 2025 mirrors previous patterns**

While the draft EPSMP 2025 projects renewables to comprise about 47 percent of the installed power generation capacity of 89.1 gigawatts (GW) in 2050, the country's growing dependence on LNG as a primary energy source could lock Bangladesh into decades of supply volatility, leading to energy security concerns. The draft EPSMP 2025's target of keeping LNG's contribution below 40 percent in total gas consumption in 2050, as opposed to 28.8 percent in FY2024–25, will keep annual LNG imports within 730 billion cubic feet (Bcf) in 2050. Even so, LNG imports would more than double from FY2024–25 levels, based on projected daily LNG demand of up to 40 percent of the total gas consumption of 5,000 million cubic feet per day in 2050. However, with the EPSMP 2025 estimating more than double the investment in LNG infrastructure compared to local gas exploration, Bangladesh is likely to build LNG terminal capacity well beyond

730Bcf per annum, raising energy security and financial risks.

The EPSMP 2025 envisages that the country's primary fuel imports will fall below 50 percent, based on the assumption that Bangladesh will produce around 24 million tonnes of domestic coal in 2050, ramping up current local production of around 0.6 million tonnes per annum by 40 times. Given the limited availability of global financing for coal mining, setting up new power plants reliant on local coal could increase import dependence.

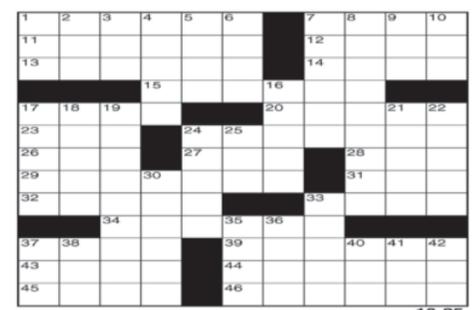
The draft EPSMP 2025, like the IEPMP 2023, plans to deploy CCS as an advanced decarbonisation technology that, despite demonstration efforts across the globe, is yet to reach maturity. IEEFA's detailed assessment shows that CCS projects consistently underperform, intensifying financial risks. IEEFA also concludes that the International Energy Agency has downgraded the role of carbon capture in its net zero emissions 2050 scenario as renewables, energy efficiency, electrification, and fuel switching are likely to reduce emissions by more than 82 percent. This indicates that Bangladesh should avoid financially risky technologies like CCS and advance renewables and energy efficiency instead.

Given the limited success of previous master plans in improving energy security and accelerating renewable energy, it is imperative for Bangladesh to design an inclusive policy formulation process. This should involve local experts and key stakeholders to bring forth solution-centric and effective ideas. For instance, the government should engage with industries that struggle to operate at optimal capacity due to energy supply shortages and come up with sustainable solutions. In addition, industries and corporates face the pressure of decarbonisation, which requires strategic policy attention. Likewise, people affected by climate change, for example in the southern districts of Bangladesh, or women burdened with the responsibility of arranging firewood for cooking, have different types of energy needs.

Unless Bangladesh incorporates rigorous consultations with stakeholders and draws on expert input throughout the formulation of its energy master plan, a lack of ownership and consensus will slow the energy transition. The next government must reform the policy-making process to avoid the high social and economic costs of delay in the energy transition.

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