

# THE ASIAN AGE

8 JULY 2025

## After US threat, Brics must enhance trade within bloc

The summit of BRICS nations did not have the presence of Xi Jinping or Vladimir Putin to add heft to the declarations. The leaders at the meeting did, however, express their concerns about security and how terror poses a threat to that with Prime Minister Narendra Modi leading the way in his long campaign against state-sponsored terror of the Pakistan variety, as in the Pahalgam attack.

Now that Donald Trump has made it clear that he considers BRICS as pursuing "Anti-American" policies and is imposing an additional 10 per cent tariffs on the bloc without exception, it is time the BRICS nations thought about how to bring down dependence on trade with America by expanding the trading among themselves.

"MAGA" may have a magnetic appeal to Americans, but the rest of the world can also take it to mean "Make All of them Grovel Again", which is what Trump is aiming to do with his tariff regimen that is supposed to correct the historical imbalance in trading with the USA. And those struggling to set things right regarding trading with Trump's USA would have calculated by now how much their economies would be affected by the sacrifices to be made to avoid steep tariffs beyond the base 10 per cent that Trump had proposed.

Geopolitics of the world has taken such a turn in the three years since Russia invaded Ukraine to show territorial integrity can be breached with impunity that security has become too complex as to render even the most powerful nations helpless in dealing with it. Approaching international trade with an open mind on diversifying is going to be the priority that nations must look at in these turbulent times.

The clock is ticking on the expiration of the 3-month pause on higher duties in trade with the USA, with tariffs to kick in on August 1. This is no time to say it is each nation for itself against a transactional US President.

India was in no position to sign a comprehensive trade deal with the US under deadline pressure, not if it meant that the nation would have to sacrifice the interest of its millions of farmers, especially that of around 80 million dairy farmers whose average holding may be 2-3 cows. Their fate can be imagined if the sector were to be opened for American dairy products to be flown into Indian urban markets.

Any hurried signing of a trade deal when Trump is holding a virtual gun to the heads of leaders of the rest of the world may lead to disastrous consequences. Politically too it would have invited reprobation if a hatchet deal were to be signed when so much is at stake. Not only would the opposition see it as grist to the mill for slating the government but the members of economic wings of the ruling BJP themselves would have turned critics of any hurried deal.

At best, a limited deal that does not deal with agriculture, dairy and GM crops right now can be the route out to meet the high tariffs deadline. Even so, it is time India parlayed its strengths into making trade deals with several other nations to bring down the pressures on trying to save the trade with the US, with its succulent surplus every year. To look for sources to diversify and move away from dependence on satisfying Trump's whims would have to be India's approach.

## Indian summer in England?

Bazball. That word, modelled on England coach Brendon McCullum's brisk-scoring approach to Test matches, has been cricket's buzz word ever since the New Zealander took over the reins. An explosive former opening batsman, McCullum was nicknamed Baz (short for bazooka) for his belligerent batting — remember he had lit up the IPL with an unbeaten 156 in just 73 balls for the Kolkata Knight Riders against Royal Challengers Bangalore in the inaugural match back in 2008.

Post his playing career, Baz pencilled the perspective in his coaching manual and got the Englishmen to execute it with much success, largely at home though. Bazball does have its pitfalls. It does not roll smoothly on all surfaces and in different conditions. It flies on a flat, but it falters when the ball begins to do a bit. That's precisely why Ben Stokes & Co. were caught unawares by Shubman Gill's India in the second Test at Birmingham. The Edgbaston pitch was a far cry from what it was over the years and provided India a placid home surface in England. Gill and his men promptly cashed in on the generosity and turned tables on the hosts.

The captain led from the front, scoring a massive double century (269) in the first innings and following it up with a punishing 161 in the second to leave England with a mountain of runs (606) to climb to win the game in three-and-a-half sessions. Playing for a draw would have been the wisest option for the hosts given the near-impossible target. But the Bazballers had other ideas, which pushed them down to 72 for 3 in roughly an hour with the final day's play coming up. Despite rain interruption, the team could not rest till tea time and were bowled out for 271 (thanks to seamer Akash Deep's 6 for 99) to hand India a mammoth 336-run win.

Gill and the boys surely have their tails up now and will approach the remaining Tests with renewed vigour looking to rub salt into their rivals' wounds as they aim to turn the English summer into an Indian one.

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Subhani



## Bizarre SIR rules: What's EC up to over Bihar polls?



Shikha Mukerjee

The Assembly elections in Bihar at the end of 2025 will be a watershed moment in India's turbulent history with elections and democracy. It could overturn the flawed but functioning system of an election based on the ideals of universal adult franchise that was instituted in 1950. The first general election in 1951 is considered one of India's greatest adventures of successfully empowering its people. It was an affirmation of the idea that each adult individual of the republic was a sovereign, the person who held the power to decide who would represent her/him and what the government would do with the power it was bestowed.

Simplistic and hopelessly romantic as this interpretation of the election process may appear to cynics and cynics of the idea of democracy, the reality is that since 1951, Indians as voters have understood the power of the vote. The Election Commission's current actions seem to be targeting that power by challenging the legitimacy of the voter as an Indian citizen.

The July 8 Bihar-wide protest called by the Congress and the Rashtriya Janata Dal, the principal regional opposition party, against the Election Commission's bizarre directives for the 25th Special Intensive Revision of electoral rolls is a delayed response to an urgent political challenge. The EC's job is to verify that the listed voter is indeed 18 years of age, resident at a specific address, and they are indeed who they claim to be and not listed under a false name.

The EC's job as defined by the Constitution is

limited. Article 324(1) states: "The superintendence, direction and control of the preparation of the electoral rolls for, and the conduct of, all elections to Parliament and to the legislature of every state" shall be the job of the EC. It does not empower the EC to verify the citizenship of voters that is the job of the National Register of Citizens.

The recently-appointed 26th Chief Election Commissioner, Gyanesh Kumar, announced he was a new born in a new Election Commission. That is a contradiction in terms; he cannot head a new body that was established under the Constitution in 1950.

Instead of doing that, the EC has declared a cut-off date, 2003, which was when the previous SIR was done, for verification of citizenship status. The issue is the EC has also claimed that it has distributed forms to about eight crore voters, which is almost the entire voting population of Bihar. In order to get this done by July-end, the EC has appointed five lakh booth officers, who these people are and how they are qualified to do the job of SIR based on the new rules is unclear and therefore suspect.

The Election Commission has made it clear it will unroll SIR in other states, presumably the Opposition ruled states of West Bengal, Tamil Nadu, Kerala and BJP-ruled Assam in the next round of Assembly elections, due in 2026.

The "new" model of verification of voters' legitimacy introduced by the Bihar SIR is a challenge to parties opposed to the NDA led by the BJP. It is also a challenge to the other parties in the NDA from Bihar as well as

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other states, because the new SIR process questions the identity of all voters, who cannot provide the peculiar list of documents the EC has arbitrarily decided are necessary to prove citizenship.

It is not too late to raise the alarm, nationwide, over how the "new" EC by its actions is challenging the right of every 18-year-old, presumed Indian, to vote under the principle of universal adult franchise. It is probably necessary for affected voters to demonstrate their power, as the sovereign, by participating in the protests led by the Opposition parties. The SIR's format has seriously sinister implications for the idea of universal adult franchise and free and fair elections.

By the EC's reckoning, some two crore voters in Bihar are suspect as legitimate, out of a total of eight crore voters in the state; if 25 per cent of the electorate of a state is suspected to be illegitimate, then it does call into question the legitimacy of the 2024 Lok Sabha elections, in Bihar as well as across the country. Bihar does not have a 2,271-km long and other states, presumably Nepal. The issue of "illegal immigrants" inflating the number of voters in Bihar has not been a political hot potato in quite the same way as it has been in West Bengal and Assam.

The EC presumes that 25 per cent of voters are not eligible to vote, because the EC determines that they may not be Indian citizens at all, then the EC and the 11-

year-old Narendra Modi government are answerable for colluding in the election of successive governments over the years of doubtful legitimacy.

The July 9 protests in Bihar could turn into an ugly showdown between the Election Commission and the Opposition parties, because the parties with the National Democratic Alliance led by the BJP are conspicuously unconcerned by the prospect of "de-voterisation" or "vote band", as it is being described in the social media. The absence of concern, presumably because the committed voters of these parties will not be adversely hit by the verification, is why there is snowballing speculation that the "vote band" will be politically targeted.

The EC over the decades has acquired a reputation of being in the service of the ruling party. If the fractured Opposition squanders the opportunity to mend and meld itself into a unified force on the issue of disenfranchisement, it will have failed in its basic responsibility of representing all voters, threatened as they are by the EC's new rules of verification. Profligate as the Congress tends to be, it has been handed a gift by the EC. And it needs to get its act together quickly. The same expectation that they will tackle the electoral hot potato in the EC's SIR format subverting the political rights of the people and the power of the sovereign also applies to the basket of Left parties in India.

Shikha Mukerjee is a senior journalist based in Kolkata

### LETTERS

#### TRADING ABUSE

In a move that underscores India's growing vigilance over its capital markets, Sebi recently barred US-based trading giant Jane Street and its affiliates from participating in Indian securities trading, citing manipulative practices in derivatives. Sebi's probe revealed the use of "marking the close" tactics — strategically placing large orders near market close to influence benchmark settlement prices. On expiry days, the firm allegedly engaged in "non-neutral" trading: pushing prices upward in the morning and selling aggressively later to exploit intraday volatility. Between 2023 and 2025, Jane Street reportedly earned over Rs 36,000 crores. The case has ignited debate over algorithmic trading abuses.

Amarjeet Kumar  
Hazaribagh  
BIHAR LAWLESSNESS

UNDER NITISH Kumar's rule, Patna has become the "crime capital of India". With the murder of businessman Gopal Khemka in broad daylight close to a police station, it is evident the people of the state are living under the shadow of loot, gunfire and murder. Such incidents have defined the "new normal" under the current governance, which has failed to provide basic security to citizens. Every new crime is now "a cry for change", and the people must vote for a new direction in governance in the coming Bihar Assembly elections. It's time to create a new Bihar, where there is progress, not fear, all around.

Bhagwan Thadani  
Mumbai

#### GOODBYE CARLSEN?

AFTER HIS second successive defeat at the hands of India's D. Gukesh, the world's top ranked chess player Magnus Carlsen has confessed he is no longer enjoying the game. The latest loss comes just weeks after Gukesh stunned Carlsen in the classical format at the Norway Chess tournament, where the Norwegian reacted by famously banging the table in frustration. "Honestly, I am not enjoying playing chess at all right now," Carlsen said. "I just don't feel any flow at all when I'm playing. I'm constantly hesitating, and it's just really poor right now." This comes as a surprise to many, given his reputation as one of the greatest players of all time. However, the five-time world champion has been vocal earlier about burnout and the mental toll of constant high-level competition.

R. Sivakumar  
Chennai



Aakar Patel

## 'Integral Humanism' is BJP's philosophy: But how many know what it really means?

The BJP's constitution (Article 3) says: "Integral Humanism shall be the philosophy of the party." The party's membership form has a pledge which members are required to take. The first line of this pledge is "I believe in Integral Humanism, which is the basic philosophy of the Bharatiya Janata Party." Integral Humanism is a term many Indians are familiar with, but few know much about.

Integral Humanism consists of the set of four lectures given by Deendayal Upadhyaya between April 22 and 25, 1965 in Mumbai. Upadhyaya held a bachelor's degree in arts and was a journalist at the RSS house publication, Panchjanya. He was about fifty when he gave these lectures and became president of the Jan Sangh a couple of years after he delivered them. Let us go through the message of the BJP's philosophy and then another time we can analyse it. What follows is a summary of the argument that Upadhyaya presents in his speeches, and it is presented as neutrally as possible.

The cause of the problems facing Bharat is a neglect of national identity. The nation is like an individual and becomes ill if its natural instincts are disregarded or suppressed. Despite independence, India was still undecided about the direction it would take to realise development. Independence is meaningful only if it is the instrument to express culture.

The focus in India was on episodic problems: economic, social and political. This was because

India adopted a Western way of looking at economic, social and political doctrines along with Western science. Westernisation was synonymous with progress for Indians. However, the West was unable to reconcile nationalism, democracy and socialism. These were essentially Western ideas and they were all in conflict with one another. These ideologies were not universal and not free from the limitations of the particular people and cultures which gave birth to these ideas. Ayurveda said that we need to find local cures to local diseases. Could Bharatiya culture provide a solution for the world?

It is generally thought that Bharatiya culture thinks of salvation of the soul and does not bother about body, mind and intellect, but that is untrue. Dharma is given foremost place in Bharatiya culture. Dharma is the natural law that is eternal and universally applicable.

Dharma is higher than the executive, legislative and the judiciary, and it is also higher than the people. If out of 450 million Indians, all except one voted for something it would still be wrong if it was against dharma. The people have no right to act against dharma. The words "secularism" and "dharma nirpeksh" used in the Constitution of India are wrong and bad because dharma is a necessary condition for the State.

That which is not based on dharma is unacceptable and therefore secularism was fatally flawed.

National unity is India's dharma and so diver-

sity was problematic. For this reason, India's Constitution needs to be changed from federal to unitary, with no legislative powers for the states, only for the Centre. Conflict between individuals and institutions of society is a sign of decadence and perversion.

The West was wrong to see the adversarial relationship between the individual and the State as the reason for progress. The individual was made up of the body, mind, intelligence and soul. A human being is born with a soul. Personality, soul and character are different from one another. The person's soul is unaffected by personal history. Similarly, national culture is continuously modified by history.

Culture includes all the things held as good and commendable, but they do not affect "chrit", the national soul. India's national soul is fundamental and central. Chrit determines the direction of cultural advance. It filters out what is to be excluded from culture. Societies are animate and a society has a body, mind, intellect and soul. Some Westerners were beginning to accept this truth. One of them, William McDougall, said that a group had a mind and a psychology, its own methods of thinking and action just as an individual did.

Societies have an inborn nature that is not based on its history. Events do not affect it. This group nature is like the soul in individuals, which was also unaffected by history. This group mentality is like mob mentality but developed

over a longer period. The nation needs both an ideal and a motherland and only then it is a nation. And the State exists to protect this nation, which has an ideal and a motherland.

The difference between India and the West was that we regard the body only as an instrument to achieve dharma. Our efforts were for dharma, artha (money), kama (pleasure) and moksha (liberation). The mistake of the West was to treat the four separately. You could get voting rights but then you did not get food. The United States had both political freedom and wealth but it also topped the list in the number of suicide and mental patients.

This was puzzling — there was bread and voting rights, but no peace or happiness. Sound sleep was scarce in America because they had not thought of the integrated human being. The Americans said "honesty is the best business policy" and the Europeans said "honesty is the best policy", but Indians said "honesty is not a policy, but a principle".

This, broadly speaking, is what the BJP says is its basic philosophy. It would be interesting to see how many BJP ministers or members can explain what it means and what it is intended to do. If they believe in it, as they are required to pledge, one would be interested to know what that belief is.

The writer is the chair of Anushti International India. Twitter: @aakar\_patel



# Text & Context

THE HINDU

## NEWS IN NUMBERS

### The dip in Tesla stocks amid concerns over the company's future

**7** In per cent, Tesla's shares took a dip in pre-market trading on Monday following Elon Musk's launch of his new U.S. political party, as it raised concerns over his future involvement in the electric vehicle maker business. The new party, called the "America Party," was unveiled on Saturday. AP

### Number of asylum seekers rescued near Crete, Greece

**230** Greece's coastguard on Monday said it had rescued around 230 asylum seekers near the island of Crete, after hundreds more landed over the weekend. An EU border agency spotted the migrants inside two inflatable boats off Gavdos, an island southwest of Crete. AP

### The fine imposed on Apple by the European Union

**500** million euros. The European Commission slapped Apple with a fine for preventing developers from steering customers outside its App Store to access cheaper deals in breach of the bloc's competition rules. Apple filed an appeal against the fine imposed by EU. AP

### The farmer suicides in Marathwada from January to June

**520** Eight districts of Maharashtra's Marathwada region experienced a 20% increase in reported farmer suicides from last year, according to revenue department reports. Beed district, where 126 farmers committed suicide during the period, topped the list. PTI

### Children who died in Maharashtra between April and February

**12,438** More than 12,000 children died in Maharashtra between April last year and February 2025, state Public Health and Family Welfare Minister Prakash Abitkar said on Monday. PTI

COMPILED BY THE HINDU DATA TEAM

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# Remaking the nuclear order in West Asia

While both the U.S. and Israel agree that Iran cannot be allowed to have a bomb, Mr. Netanyahu goes one step forward to deny Iran any nuclear capabilities. However, for Iran, nuclear deterrence assumes a greater importance now, even if there is a change of regime

## WORLD INSIGHT

Rakesh Sood

**T**here is hardly any political leader who understands the laws of political survival better than Israeli Prime Minister Benjamin Netanyahu. Realising that he is in a morass with respect to Gaza, as Hamas has not yet been dismantled even though its leaders have been killed, and all hostages have not been brought home resulting in growing domestic pressure, Mr. Netanyahu employed an old tactic — distract attention from an ongoing crisis by creating another one.

Israel's surprise strikes on Iran, launched on June 13, created a new and larger crisis. The military action has been successful, with the U.S. finally coming on board. For the moment, PM Netanyahu is firmly back in the driver's seat. But this has also opened a Pandora's box of what next.

### Israel's calculations

Mr. Netanyahu wants to keep Israel as the only nuclear power in the region. He is convinced that the Libyan model, where the nuclear programme was completely dismantled, is the only acceptable option, preferably with a change of regime. In 2015, he opposed the Joint Comprehensive Plan of Action (JCPOA) primarily because it conceded a limited uranium enrichment right to Iran. Since mid-April, five rounds of talks took place between U.S. Special Envoy Steve Witkoff and Iranian Foreign Minister Abbas Aragchi, with a sixth round due on June 15 in Muscat. After stumbling over the issue of Iran insisting on its right to enrichment as a party to the Treaty on the Non-Proliferation of Nuclear Weapons (NPT), some progress was registered on the idea of a regional nuclear fuel consortium to provide fuel for the reactors in the region. Its location remained under discussion, making Mr. Netanyahu nervous.

On June 11, Mr. Netanyahu barely survived a motion in the Knesset tabled by the opposition seeking to dissolve parliament, leading to early elections that are currently due in October 2026. PM Netanyahu has been facing domestic opposition since early 2023 due to his attempts at pushing through controversial judicial reforms that were widely seen as curbing judicial independence. The Hamas attack on October 7 had provided him a reprieve that has lasted nearly two years. Given Mr. Netanyahu's multiple domestic legal challenges, a continuing war is his "get-out-of-jail" card.

During the 20-month war, the leadership of Hamas and Hezbollah has been decapitated, and a change of regime in Damascus last December has doused Iran's "ring of fire." On two occasions in 2024, Israel directly engaged with Iran and, in the process, knocked out its air defences around Tehran and other critical installations.

Having buried the two-state solution, and with Iran at its weakest, Mr. Netanyahu must have felt that this was the ideal time to neutralise Iranian nuclear and missile threats. The Iranians are known for their frustratingly convoluted negotiating style and given U.S. President Donald Trump's impatience, Mr. Netanyahu was able to convince him that a little military pressure would make them more accommodating.

### Iran's miscalculations

As recently as March 26, U.S. Director of National Intelligence Tulsi Gabbard in her



**Cost of war:** Workers repair the main entrance of Evin Prison after it was hit by an Israeli airstrike on June 23, on July 1, in Tehran, Iran. GETTY IMAGES

annual intelligence threat assessment to Congress stated, "the Intelligence Community continues to assess that Iran is not building a nuclear weapon and Supreme Leader Khamenei has not authorised the nuclear weapons programme that he suspended in 2003". This gave Iran's leadership a misplaced confidence that as long as the negotiations continued on the idea of a regional enrichment facility, the U.S. would block any military strike by Israel.

However, the International Atomic Energy Agency (IAEA) report in May criticising "Iran's general lack of cooperation" and the near doubling of its stockpile of 60% enriched uranium to over 400 kgs since February proved to be more damaging than Iran anticipated. This heightened Iranian concerns about the threat of a sanctions-snapback by the UN Security Council, which was waived in 2015 following the adoption of the JCPOA. Iran knew that given its ageing air force, it was dependent on its stocks of drones and missiles. Despite the debates with Hamas and Hezbollah leaderships, Iran underestimated the extent of Mossad's penetration of its systems, evidenced by the targeted assassinations of its key military leaders as well as nuclear and missile scientists.

### The entry of the U.S.

When the U.S. began to withdraw non-essential staff from its embassies in the region in early June, it was anticipating Israel's likely military action. In the past, U.S. reluctance to get involved had prevented Israel from military strikes but this time, Mr. Netanyahu took a gamble and it paid off. Impressed with the success of Israel's military actions, Mr. Trump ordered supportive strikes on June 22, with B-2 bombers dropping GBU-57 "bunker-busters" on Fordow and Natanz, and Tomahawk cruise missiles on Isfahan.

Following the token retaliation by Iran the following day, Mr. Trump declared an end to the "12-day-war".

Israel thus claimed victory. Mr. Trump declared the underground sites "obliterated," the Gulf states heaved a sigh of relief, and for Iran's Supreme Leader, regime survival was a victory. Iran suffered over 600 casualties, and all its air defences and half its stock of missile launchers, were destroyed. It failed to take down a single Israeli aircraft though it did bring down some drones. Of the 500 missiles that Iran fired, over 30 were able to get through causing 30 casualties.

While Mr. Netanyahu's suggestion that sustained military pressure may bring about a regime change in Tehran has some support from Iran-hawks in Washington, it is anathema to Mr. Trump's MAGA support base, who are wary of entanglements abroad. The U.S. interventions in Afghanistan and Iraq in 2001 and 2003 respectively, were messy and costly, leaving behind a legacy of instability. Iran is three times larger, and Iranians are a people with a deep sense of nationalism based on their civilisational history. The current theocratic regime may be weak and its replacement may be less religious, but not less nationalist, and it would therefore push ahead with the nuclear deterrent.

Mr. Netanyahu may not be averse to a forced regime change but the U.S. and the Gulf Arabs would not want to open this Pandora's box.

### Iran's nuclear capability

Iran has had an ambitious civilian nuclear programme going back to the 1950s. It joined the NPT in 1970. Initially, the Islamic regime was uninterested in the nuclear programme, seeing it as a part of Western influence. This changed after the Iran-Iraq war and in the 1990s, it began developing a clandestine enrichment

capability. The 2002 disclosures by a group of Iranian exiles, followed by the U.S. invasion of Iraq in 2003, led the Supreme Leader to shift direction and aim for threshold status rather than develop a full-fledged nuclear weapon. The centrifuges and higher levels of enrichment also provided for bargaining space as Iran could negotiate for sanctions relief with the U.S.

Today, the situation has changed. Iran's proxies (except for the Houthis) have been decimated and its missile and drone capabilities found wanting. The threshold state is no longer a safe place. Therefore, a nuclear deterrent assumes greater importance, even if there is a change of regime.

Questions remain about the extent of damage to the underground centrifuge sites as well as the fate of the 400 kg of the 60% enriched uranium stockpile. While the scale of the attacks makes resumption of Iran-U.S. talks tricky, Iran has raised the stakes by terminating the IAEA inspector's access to its nuclear sites. Mr. Trump would like to conclude a deal with Iran to build on his success with the ceasefire. He would do well to remember the U.S. scholar Thomas Schelling's advice that successful coercion requires both a credible threat as well as credible reassurance, if Iran is to be 'persuaded' during any future talks.

There has always been a difference between the U.S. and Israeli positions. While both agree that Iran cannot be allowed to have a bomb, Mr. Netanyahu goes one step forward to deny Iran any nuclear capabilities. However, since Mr. Trump has obliged him with the June 22 strikes, he may find it difficult to deny Mr. Trump his Iran deal provided the Iranians play the game.

Rakesh Sood is a former diplomat and is Distinguished Fellow at the Council For Strategic and Defence Research.

## THE GIST

▼ Mr. Netanyahu wants to keep Israel as the only nuclear power in the region. He is convinced that the Libyan model, where the nuclear programme was completely dismantled, is the only acceptable option, preferably with a change of regime.

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▼ While Mr. Netanyahu's suggestion that sustained military pressure may bring about a regime change in Tehran has some support from Iran-hawks in Washington, it is anathema to Mr. Trump's MAGA support base, who are wary of entanglements abroad.



## The free fall of moral leadership

In an era of global conflicts and democratic decline, the question of political leadership in the democratic world has acquired a heightened significance. Intensified rivalries in several parts of the world represent a failure of leadership. The unconscionable ambivalence of world leaders in standing up for principle over expediency, and their abject surrender to hegemonic power, speaks for itself. The tragedies of Ukraine, Gaza, and the Israel-Iran conflict show the ravages of war caused by the insolence of power, untamed by humanitarian interests.

**Justice above raw power**  
Despite the fragile ceasefire brokered by U.S. President Donald Trump from a position of overarching military superiority, the footprints of these hostilities will remain visible symbols of an oppressive exercise of military power that has taken thousands of innocent lives. Those responsible for the catastrophe have clearly forgotten the abiding lesson of history that people carrying a festering wound in their souls find closure only when injustice is avenged. Lasting peace in West Asia will remain hostage to an indelible sense of injustice and moral outrage.

It is, therefore, imperative to foster leadership that values justice above raw power. In the deeply distressing trans border conflicts that have driven the world perilously close to a global war, the moral and intellectual impoverishment of the principal actors has raised concerns about the failure of contemporary democracies to yield inspiring leadership, answerable to the 'injunctions of conscience'. The pretence of a functional rules-based international order helmed by the United Nations Charter stands demolished yet again, reconfirming the impotence of international law in outlawing the use of force in relations between nations. The illegal

**Ashwani Kumar**

Former Law Minister;  
Senior Advocate,  
Supreme Court;  
and author

invasion of Iraq and parts of Ukraine are no more than footnotes of history.

### Lessons to learn

But there are lessons to be learned. The world needs leadership, driven by a search for global consensus and subject to the discipline of international law to address the defining challenges of our times, including the settlement of territorial disputes. This is a particularly important reminder for those who claim to lead the democratic world and propound the necessity of a credible international legal order. Democratic leadership is about walking alone in defence of principle, where necessary. It is about holding on to the truth against all odds and empowering the weak. It is about uniting people in trying times and advancing human dignity by removing disparities. Inspirational leadership is about an unremitting endeavour to create favourable conditions of social and political existence that can optimise the realisation of human potential in an environment of peace and harmony. And as shown in the tortuous process of securing a fragile truce between Israel and Iran, deceit and two-facedness annul leadership.

Leadership does not emerge out of a vacuum. As Karl Marx reminded us famously, 'Men make their own history, but they do not make it as they please... [they do so] under circumstances existing already, given and transmitted from the past.' The French statesman Chateaubriand proclaimed that 'the leader of the nation must be the leader of the times', so that his exertions mirror the aspirations of the people and invest politics with a moral purpose larger than himself. The current global conflicts present an opportunity for democracies to look inwards for correction and to reinforce their appeal.

### In defence of justice

Indian democracy, which has

survived several vicissitudes and a 'thousand mutinies', has been enriched by the exertions and selflessness of several of its towering leaders. They were led by Mahatma Gandhi, who defined for us the meaning of transformative leadership. The Mahatma's promise of politics, impervious to the trappings of power and rooted instead in the moral imagination of the people yearning for freedom and dignity, enabled him to forge a sustainable non-violent struggle against injustice. He accomplished the 'will of his age', defined it for the people, and personified it.

As a proud inheritor of the Gandhian legacy of morality-driven politics and drawing strength from its civilisational ethos of 'Vasudhaiva Kutumbham', India must stand out in defence of justice everywhere. It must flex its moral muscle for shaping a just world order. Its economic heft, nuclear capabilities, and regional power status should enable India to espouse international morality without compromising its strategic autonomy or without alienating key allies.

In these defying times, we must summon our tallest leaders to collectively enquire Indian democracy. They must establish the exceptionality of their leadership in the service of national goals and global peace. Our leaders must 'reinforce the tone of modesty', introduce dignity at the centre of political processes, revive the spirit of collegiality, be seen as symbols of hope in times of fracture and fear, and re-purpose their politics beyond the pursuit of raw power.

At this juncture of the nation's history, when domestic and external challenges threaten the social accord and disruptive shifts in the power pendulum are testing the societal equilibrium, we need leadership that is strong and compassionate, resolute but conciliatory, and decisive while striving for democratic consensus on critical issues.

## A step away from transparency

There are several pressing concerns about the ECI's new rules

### STATE OF PLAY

Krishangdi Sinha  
Sanjay Kumar

The Election Commission of India (ECI) has introduced some new rules and revisions, including a Special Intensive Revision (SIR) of the electoral rolls in Bihar before the Assembly polls. This exercise will then take place across the country.

In Bihar, the SIR exercise, aimed at removing duplicate entries in electoral rolls, started on June 25. It uses the 2003 electoral rolls as the base. The process includes door-to-door verification and new documentation requirements. The ECI aims to publish the final voters' list by September 30.

As part of the process, voters listed in the 2003 electoral rolls – the last time that an intensive revision was done in Bihar – do not have to submit documents unless they are asked. However, those who were not on the list in 2003 and new applicants will have to provide proof of date and/or proof of place of birth of self if they were born before July 1, 1987; proof of date and/or proof of place of birth of self and of one parent if they were born between July 1, 1987 and December 2, 2004; and proof of date and/or proof of place of birth of self and both parents if they were born after December 2, 2004.

On the surface, this seems aligned with the ECI's broader goal of cleaning the electoral rolls and eliminating ghost voters from the voters' list and ensuring that only eligible Indian citizens exercise their franchise, which is fundamental to a free and fair democratic process. However, there are several concerns. First, many individuals/families from



poor, Dalit, Muslim, tribal, and migrant communities often lack formal birth certificates. Second, many others will struggle to produce documents for verifying their parents' place of birth, largely due to historical gaps in State documentation.

Third, there may be lack of awareness and clarity around the new requirements. Many voters, especially in rural areas, may not fully understand which documents are needed, how to fill out forms, or where and when to submit them. With limited public outreach, complex paperwork required, and a tight timeline leading up to the final publication of the electoral rolls by September 30, there is a high risk of confusion, errors, and unintentional exclusions, particularly of those already on the margins of the system.

Fourth, the process relies heavily on field-level officials (booth level officers and electoral registration officers), who hold discretionary power. While the framework allows for claims, objections, and appeals, the initial verification and decision-making are in the hands of local officers. This may lead to inconsistencies, delays, or biased judgment, especially in areas with limited oversight.

Fifth, the ECI has neither committed to publishing the list of names being removed from the electoral rolls, nor has it provided a clear, accessi-

ble system for applicants to track the status of their submissions. This makes it difficult for citizens, civil society, and the media to monitor the process, identify errors, or challenge wrongful exclusions, raising serious questions about accountability.

The Lokniti-Centre for the Study of Developing Societies (CSDS) post-poll survey of the National Election Study 2024 revealed a concerning trend. When respondents were asked whether they trust the ECI, 12% said 'not much' and 7% said 'not at all'. In this atmosphere of suspicion, the ECI has now published a circular directing that all photos, videos, CCTV footage, and webcasts from polling stations be deleted within 45 days of the election results, unless an election petition is filed within that period. Earlier, footage and photos were retained for three months to one year, depending on the stage of polling. This new measure not only limits the time to scrutinise the material, but also shuts off avenues for transparency that existed earlier.

While steps such as the EPIC clean up and voter turnout upgrade suggest that the ECI is pushing for efficiency, actions such as deleting polling station footage prematurely, implementing new documentation rules without sufficient public awareness, and failing to disclose names removed from electoral rolls contribute to the prevailing atmosphere of uncertainty and distrust. At a time when public trust in institutions is under great strain, the ECI cannot afford to be so opaque and must take measures to ensure transparency.

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## Women MSMEs still struggle for credit despite schemes

Limited access to formal credit and the widening credit gap continue to prevent women entrepreneurs from achieving their financial goals

### DATA POINT

B. Renuka Ramakrishna

Micro, Small and Medium Enterprises (MSMEs) have become instrumental in shaping India's generating employment, creating revenue, and in global outreach. In 2024, MSMEs contributed nearly 30% to the GDP. The aim is to raise this to 35% in the current year. This vast sector also provides opportunities for many women-led enterprises. The government has implemented several financial schemes specifically designed to promote women's participation.

However, the issues and challenges faced by women-led MSMEs are often inadequately addressed. The problems of limited access to formal credit and the widening credit gap continue to prevent these entrepreneurs from achieving their financial goals. While ensuring adequate credit availability to MSMEs has long been a key policy objective, gaps between banks and beneficiaries often persist at the implementation stage.

Women-owned businesses account for up to 20% of all MSMEs registered in India. This level of female participation remains low despite the handful of schemes aimed at encouraging self-employment and financial independence. What is more striking is that women-led MSMEs contribute only about 10% of the total turnover, while receiving around 11-15% of the total investment in the sector (Chart 1). These numbers highlight the persistent gaps in both financial inclusion and credit accessibility for women in the MSME ecosystem.

According to reports by the Small Industries Development Bank of India (SIDBI), women face significant discrimination in fund disbursement, with a credit gap of around 35% – meaning that over a third of their financial requirements go unmet – compared to a

20% credit gap faced by men (Chart 2). The credit gap refers to the difference between the amount of credit requested by the borrower and the amount actually received. These inadequate funds are one of the major challenges for women in the MSME sector, affecting about 26% of them, followed closely by the challenge of high competition.

The Pradhan Mantri MUDRA Yojana (PMMY), launched nearly a decade ago to support individuals seeking self-employment, has also enabled women to open loan accounts and fund their MSMEs. PMMY offers collateral-free loans to MSMEs operating in the non-farm sector. As of 2024, women owned 42,492,281 loan accounts under PMMY out of a total of 66,777,013 accounts, which is approximately 64%. This shows that women form a significant group seeking financial assistance.

However, the sanctioned amount tells a different story. Of the total ₹5,41,012.86 crore allocated for that year's target, only ₹2,25,887.08 crore (about 41%) was directed towards women-led MSMEs. This disparity points to an economic inefficiency in delivering highly liquid, low-cost, and easily accessible loans to the underserved sections of the sector.

These underperforming schemes are pushing women to rely on informal sources of credit, which are often riskier and unreliable. These challenges are not confined to MSMEs alone; they also affect informal micro-enterprises (IMEs) run by women. Informal businesses are typically excluded from formal credit processes due to the lack of legal documentation and collateral. To address this gap, the government launched the Udyam Assist Portal, which helps such IMEs become eligible for priority sector lending by facilitating their formal recognition.

This year, over 1.86 crore IMEs have been registered through the portal. Notably, 70.5% of these are owned by women. This achieve-

ment has significantly boosted employment, with women-led IMEs contributing 70.8% to employment generation within this segment (Chart 3).

However, despite being registered, these businesses continue to face challenges in accessing formal credit. Dr. Ashwin Ram, Professor at RV University, said the main reasons for this are lack of awareness and limited access to formal credit. He said, 'A majority of first-generation women entrepreneurs, particularly in smaller towns and rural areas, have low financial literacy and are not well-informed about various government schemes and their benefits. There is also little support from traditional commercial banks and local government agencies to educate and assist women entrepreneurs in availing financial subsidies.'

Women entrepreneurs are also often perceived as risky borrowers, largely because they lack adequate collateral or property ownership. In India, a significant proportion of women run micro and small businesses predominantly in the informal sector, which further discourages them from seeking finance through formal institutions. According to the International Finance Corporation, it takes a man an average of two visits to a bank to get a loan sanctioned, whereas women typically need to make at least four.

Amid these discriminatory barriers, the Reserve Bank of India has cut the repo rate to 5.50%, the lowest since 2022, and reduced the Cash Reserve Ratio by 100 basis points. This policy is aimed at injecting more liquidity into the economy, leaving commercial banks with greater funds to extend as loans to the public. Both banks and women entrepreneurs are in a favourable position, with increased liquidity at their disposal.

The government's schemes have been launched with a strong intent, but their implementation has often fallen short due to administrative inefficiencies.

### Gender gap in MSMEs

The data for the charts were taken from Reserve Bank of India, Press Information Bureau, SIDBI, NITI Aayog, Micro Units Development & Refinance Agency Ltd. (MUDRA)

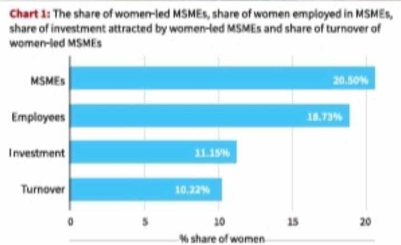


Chart 1: The share of women-led MSMEs, share of women employed in MSMEs, share of investment attracted by women-led MSMEs and share of turnover of women-led MSMEs

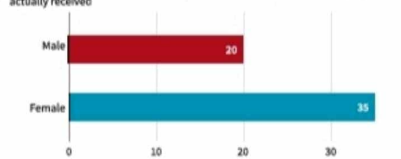


Chart 2: The credit gap across genders. Credit gap refers to the difference between the amount of credit requested by the borrower and the amount actually received

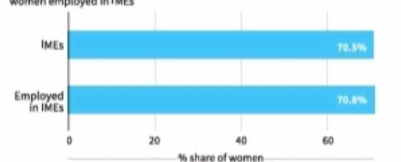


Chart 3: The share of women-led informal micro-enterprises (IMEs) and share of women employed in IMEs

### FROM THE ARCHIVES

## The Hindustan

FIFTY YEARS AGO JULY 8, 1975

### U.S. and Russia getting ready for space rendezvous

Cape Canaveral, Florida, July 7: Five years ago, it was considered impossible, a dream. But on July 15, American astronauts and Russian cosmonauts are to rocket into orbit to start an historic joint space flight, appropriately labelled a mission of "high-flying détente".

Much symbolism and prestige will be involved on this first international flight of the world's leading spacefaring nations, once keen rivals in space exploration until U.S. astronauts landed on the moon. Neither wants to fall in the global spotlight that will follow every moment.

It won't be just a "handshake in the sky", say the astronauts and cosmonauts, but a mission that hopefully will lead to future co-operative flights in large space stations and perhaps to the planets.

The flight is scheduled to start at 8:20 a.m. (17:50 IST) with the launching of the two cosmonauts in a Soyuz spacecraft from the Soviet Union.

If there are no problems, three Apollo astronauts will ride an Apollo spacecraft away from Cape Canaveral 7.5 hours later.

With the more sophisticated Apollo performing all the critical manoeuvres, the astronauts will pursue the Soyuz through the skies for two days, moving in for a link-up at 12:15 p.m. (22:45 IST) on Thursday July 17, 224 km above West Germany.

Three hours later, both ends of an airlock tunnel connecting the vehicles will be opened and the American Commander, Air Force Brig. Gen. Thomas Stafford, and the Russian Commander, Air Force Col. Alexei Leonov, will shake hands.

It will be a moment of high emotion, not only for its symbolism, but because these two men have become fast friends during two years of training. Both believe that through flights like this, high in space, their two nations can achieve détente on earth.

A HUNDRED YEARS AGO JULY 8, 1925

### The G.I.P. Railway

Bombay, July 8: The G.I.P. Railway are introducing a travelling Cinema Car, the idea being that the car will travel up and down the line, imparting knowledge to the staff, by means of films showing exactly how their work should be done.





## Keep it simple

The EC's conflicting signals endanger Bihar's voter registration process

**T**he Election Commission of India's (ECI) Special Intensive Revision (SIR) of Electoral Rolls in Bihar, while touted as a smooth process with significant form submissions, is riddled with contradictions and poses a serious threat to voter enfranchisement. Despite claims of progress, with over 10% of the estimated electorate submitting forms, conflicting statements from the ECI highlight deep-seated issues. Initially, the CEO, Bihar, through advertisements, suggested a lenient approach towards electors who did not have the stipulated ID documents. They were told that they could submit enumeration forms to booth-level officers and provide documents later, or even get verified without mandatory documents, with verification through local investigations by Electoral Registration Officers. However, the CEC clarified that earlier orders mandating document submission by July 25, 2025, stand, with a claims and objections period from August 1 to September 1 for those who fail to comply. This shift in stance and reliance on local-level investigations for verification present inherent problems. Leaving verification to the discretion of local electoral officers increases the possibility of misuse and bias. Such an ad hoc approach risks wrongful inclusions or exclusions, undermining the integrity of the electoral roll.

Instead, the ECI should adopt a more pragmatic and robust approach by accepting more universally available identity documents such as Aadhaar, ration cards, and MGNREGA job cards. The ubiquity of Aadhaar, and its mandatory requirement for numerous government services, makes it an ideal proof of identity. Similarly, ration cards and MGNREGA job cards are widely held, particularly among agrarian populations, as they are central to India's welfare initiatives. Bihar's historical challenges in birth registration, school enrolment, and broader documentation mean that a significant number of genuine electors may lack any of the ID indicative documents. The onus is on the state and its institutions, including the ECI, to facilitate their participation. The current rigid documentary requirements place an undue burden on voters, especially the marginalised and underprivileged, who already face significant hurdles in engaging with bureaucracy, and risks widespread disenfranchisement. The current Bihar exercise seems to be treating every voter as a potential non-citizen unless proven otherwise. To uphold the principle of universal adult franchise and prevent large-scale exclusion, the ECI must urgently reconsider its SIR even as the Supreme Court is due to hear petitions challenging this exercise. The ECI should immediately broaden the acceptable forms of identification, ensuring that all eligible citizens have the opportunity to exercise their constitutional right to vote.

## Batting for prevention

A One Health programme is essential to prevent zoonotic spillover

**W**ith two cases of Nipah virus detected in Kerala – including one fatality owing to the infection – the attention is rightfully, once again, on a preventable infectious disease that could leave havoc in its trail. An adolescent girl from Malappuram succumbed to the virus on July 1, and a 38-year-old woman from Palakkad is battling for life in the hospital. In the big picture, as many as 425 people who are in the contact lists of the two Nipah-infected persons in three districts in Kerala have been identified and are under surveillance. Of these, 228 are from Malappuram district, where Patient Zero was identified this time, 110 in Palakkad and 87 in Kozhikode. In Palakkad, one contact is being treated in isolation, while 12 people are currently undergoing treatment in Malappuram – five of them are in the intensive care unit. One of them tested negative for the infection, and the results for the others are awaited. Over 140 of those on the contact list are said to be health workers. While the health machinery in Kerala is engaged in tracing the original source of the infection, it is also tasked, particularly in the three districts of Malappuram, Palakkad and Kozhikode, to trace contacts, isolate them to prevent further spread, contain infection and treat all those who show symptoms. India has recorded several outbreaks of the virus since 2001, a year when 45 of the 66 people infected died in West Bengal. In 2018, it surged in Kerala, with 17 of the 19 cases with laboratory-confirmed Nipah infection dying without responding to treatment. Kerala continues to report outbreaks regularly since then.

What renders even a single case of significant concern to get the entire health-care machinery in a tizzy? Nipah is a transmissible viral infection with a high mortality rate, ranging between 40% and 75%, which implies that if the infection spreads, then, a number of people are likely to die. Future research might add an effective tool to the armamentarium to effectively treat Nipah infections without mortality, but as of now, the course of action is vested only in prevention and awareness generation. Nipah is transmitted by fruit bats which are the natural reservoirs of the virus. It is suspected that consuming contaminated fruits, bitten or licked by bats, may play a role in spreading the virus. It is also equally important to cast a watchful eye on climate change-related factors, particularly anthropogenic activity that is destroying natural habitats, and initiate a robust One Health programme that will weigh not just Nipah but also other pathogens that are capable of zoonotic spillover, transitioning from animals to humans and causing great harm.

**I**n childbirth in India, why should 93 women lose their life while one lakh women have a safe delivery? For the time period 2019-21, the Maternal Mortality Ratio (MMR) estimate for India was 93, in other words, the proportion of maternal deaths per 1,00,000 live births, reported under the Sample Registration System (SRS). "Maternal death is the death of a woman while pregnant or within 42 days of termination of pregnancy, irrespective of the duration and site of the pregnancy, from any cause related to or aggravated by the pregnancy or its management, but not from accidental or incidental causes". But the MMR in India has declined over the years – it was 103 in 2017-19, then 97 in 2018-20 and now 93 in 2019-21.

To understand the maternal mortality situation better, States have been categorised into three: "Empowered Action Group" (EAG) States that comprise Bihar, Jharkhand, Madhya Pradesh, Chhattisgarh, Odisha, Rajasthan, Uttar Pradesh, Uttarakhand and Assam; "Southern" States which include Andhra Pradesh, Telangana, Karnataka, Kerala and Tamil Nadu; and "Other" States that cover the remaining States/Union Territories.

In the group of "Southern" States, Kerala has the lowest MMR (20) and Karnataka the highest (63). The rest of the data is Andhra Pradesh (46), Telangana (45) and Tamil Nadu (49). In the EAG States, Assam has a very high MMR (167); the rest of the data is Jharkhand (51), and Madhya Pradesh (75), Bihar, Chhattisgarh, Odisha, Rajasthan, Uttar Pradesh and Uttarakhand are in the 100-151 range. In the category of "Other" States, Maharashtra is 38 and Gujarat 53; the rest of the data is Punjab 98, Haryana 106 and West Bengal 109.

We need to have a differential approach in strategy to reduce maternal deaths in the different clusters of States. In this, addressing three issues is fundamental. There are "three delays" that lead to a mother dying, according to Deborah Maine of Columbia University – I had incorporated this in the training module on 'Safe Motherhood in India' in 1992.

### Key factors that endanger a life

The first delay is in recognising impending danger and making a decision to rush and seek expert care. The husband and other family members often experience inertia, thinking that all deliveries are a natural process and so the mother-to-be can wait. Or they may not have enough money or other issues at the family level that prevent them from going to a hospital. If the educational level of family members and their financial position are weak, delayed decision making is detrimental. But, empowered, neighbourhood mothers and women's self-help groups have resulted in a remarkable change; no longer is a mother-to-be neglected by lethargic family members. Ever since Accredited



Dr. K.R. Antony

is a Public Health Consultant in Kochi, Kerala, who drafted the first Safe Motherhood module for the Ministry of Health on behalf of UNICEF

The Maternal Mortality Ratio for India is on the decline, but there are States that need to focus on basic and systemic issues

Social Health Activists (ASHA) began networking with Auxiliary Nurse Midwives (ANM) since 2005 (when the National Rural Health Mission (NHRM) was launched), institutional over home deliveries have become the better option. The financial incentives for the mother and ASHA were the turning point.

The second delay is in transportation. From remote rural hamlets and forest settlements or faraway islands it may take many hours, or an overnight journey for a mother-to-be to reach a health facility with a skilled birth attendant (midwife/staff nurse) or a doctor or an obstetrician. Many women die on the way. However, the 108 ambulance system and other Emergency transport mechanisms under the National Health Mission has made a difference.

### Other problems

The third delay, an unfordable one, is in initiating specialised care at the health facility. The excuses are plenty and difficult to justify – a delay in attending to a woman in the emergency room; a delay in reaching the obstetrician; a delay in getting a blood donor, in laboratory support, the operation theatre not being ready, an anaesthetist not being available is a list that can go on. The concept of the operationalisation of a 'minimum four FRUs (first referral units) per district of two million population, is crucial. The "first level referral unit" with specialists such as an obstetrician, anaesthetist, paediatrician, blood bank and operation theatre was aimed at preventing maternal death at the doorstep of a hospital.

Unfortunately, this has not worked out as expected since 1992. There are problems such as 66% vacancies of specialists in 5,491 community health centres out of which 2,856 are supposed to be FRUs in 74 districts. The lack of blood banks or blood storage units in these designated FRUs was another reason for many mothers not receiving adequate blood transfusion within two hours of the onset of massive bleeding after delivery, leading to fatalities.

The biggest killer is bleeding after delivery.

This could be due to inadequate and timely contraction of an overstretched uterus with a baby of three-kilogram weight floating in amniotic fluids. When the placenta is separated after delivery, the raw opened surfaces of the uterine wall will bleed profusely unless it immediately contracts. From a total reserve of five litres of blood, more than half is lost in such a short duration, resulting in the mother going into shock and death. If there is underlying anaemia, which has not been treated with iron folic acid supplements in pregnancy, it will also result in tragedy. Thus, there is a need for immediate blood transfusion and emergency surgical care.

The next emergency is obstructed labour where the contracted bony pelvis of an already

stunted young mother (who is also malnourished and has low body mass index) does not allow the normally grown baby to emerge. Prolonged labour can lead to foetal distress and a lethal rupture of the uterus. This can be avoided by a Caesarean section. Thus, there is a need for a well-equipped operation theatre and obstetrician/ surgeon on an anaesthetist on call.

The third medical cause is hypertensive disorders of pregnancy that are not recognised and treated on time. They can result in a dire emergency with convulsions and coma and very little time to medically control high blood pressure. There are some home deliveries by untrained birth attendants which lead to trauma and puerperal infection, resulting in sepsis and death. Antibiotics could have saved their lives, but the patient is admitted to hospital late. A failure of contraceptive devices, resulting in unwanted pregnancies and crude abortion techniques by quacks, also leads to sepsis and death. In EAG States, associated illnesses such as malaria, chronic urinary tract infections and tuberculosis are also high risk factors.

### The focus areas for States

The prescription for averting maternal deaths is early registration and routine antenatal care and ensuring institutional delivery. Many of these systemic deficiencies will be highlighted in the mandatory reporting and audit of all maternal deaths under the NIM. While the EAG States have to focus on the implementation of basic tasks, the southern States group and probably Jharkhand, Maharashtra and Gujarat need to fine tune the quality of their emergency and basic obstetric care.

The Kerala model of a Confidential Review of Maternal deaths, initiated by Dr. V.P. Paily, has some analytical leads on how Kerala can further reduce its already low MMR of 20. It is a model other southern States can emulate. The use of uterine artery clamps on the lower segment, application of suction canula to overcome atony of the uterus, and a sharp loop for and energetic management of amniotic fluid embolism, diffused intravascular coagulation, hepatic failure secondary to fatty liver cirrhosis are strategies taught to obstetricians, which even developed countries have yet to practice routinely. They even address antenatal depression and post-partum psychosis as there were a few cases of pregnant mothers ending their life.

Finally, if there is a commitment and a will to stop preventable maternal deaths there is no limit to the varieties of proactive interventions.

The writer acknowledges inputs on the Confidential Review of Maternal Deaths in Kerala from Dr. Smithy Saneel, a Spokesperson of the Kerala Federation of Obstetrics and Gynaecology

# Rising seas, shifting lives and a test of democratic values

**T**he intensifying impacts of climate change are reshaping India's coastline resulting in an environmental phenomenon and also profound social and economic rupture. Across the eastern and western seabords, communities that are historically dependent on agriculture, fishing, and coastal ecosystems are being displaced by rising seas, saltwater intrusion, and the cumulative effects of unregulated development. This has triggered migration, pushing displaced populations into precarious urban labour markets without legal protection or adequate state support.

In Odisha, once thriving coastal settlements such as Satabhaya have been swallowed by the sea, forcing villagers to relocate to government resettlement colonies that often fail to provide sustainable livelihoods. In Karnataka's Honnavar taluk, traditional fishing communities face dispossession as ports, tourism projects, and mangrove destruction accelerate coastal degradation. Similar patterns are unfolding in Tamil Nadu's Nagapattinam, Gujarat's Kutch region, and the flood-prone lowlands of Kerala.

**Projects and environmental degradation** Industrial and infrastructural expansion along coastal zones – from port development under the Sagarmala programme to energy projects and commercial aquaculture – have compounded ecological degradation. Mangrove forests, sand dunes and wetlands that historically buffered coastal communities have been systematically cleared.

Environmental clearances for many projects have overlooked cumulative climate risks, leading to a development model that intensifies ecological and social vulnerabilities. The displaced populations are increasingly getting absorbed into the informal economy as construction workers, brick kiln labourers and domestic workers in urban centres such as Bhubaneswar, Chennai, Hyderabad and Mumbai. These migration patterns often result in systemic labour exploitation, which include debt bondage (displaced families take wage advances to survive, tying them into exploitative labour conditions); lack of legal protections (informal



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Climate change is affecting India's coastal communities with a deep social and economic impact

workers have little or no access to rights under India's labour laws, such as the Building and Other Construction Workers' (Regulation of Employment and Conditions of Service) Act, 1996) and gendered exploitation (displaced women entering domestic work face heightened risks of abuse, underpayment, and trafficking).

### Legal lacunae on climate displacement

The absence of a coherent legal framework on climate-induced migration exacerbates this crisis. While Article 21 of the Constitution guarantees the right to life and dignity, there is no specific legislation that addresses the rights of those displaced by slow-onset climate disasters. Existing frameworks such as the Disaster Management Act, 2005, the Environment (Protection) Act, 1986, and the Coastal Regulation Zone (CRZ) Notifications, including the diluted CRZ 2019, are limited either to disaster response or environmental conservation, without adequately factoring in the socio-economic dimensions of displacement.

The National Action Plan on Climate Change (NAPCC) and State Action Plans recognise vulnerability, but lack targeted strategies for the rehabilitation of displaced populations or integration into labour markets.

The CRZ Notification, 2019, intended to streamline clearances and promote sustainable coastal management, has often been critiqued for prioritising tourism and industrial development over the rights of coastal communities. Across States, the dilution of zoning regulations has led to a surge in commercial projects in fragile coastal belts, displacing traditional fishing communities without their informed consent – a principle enshrined in national law and international environmental standards. Even India's landmark Labour Codes are silent on extending specific protections to climate migrants.

Environmental justice jurisprudence from the Supreme Court of India – in *M.C. Mehta vs Union of India* (1987) and *Indian Council for Enviro-Legal Action vs Union of India* (1996) – has recognised the intrinsic link between the environment and fundamental human rights. Yet, the translation of

these principles into robust, community-centric legal frameworks on climate displacement remains lacking.

The story of displacement is also the story of resilience. Coastal communities, particularly fisherfolk unions and indigenous groups, have resisted ecologically destructive projects with remarkable tenacity. The protests against the Adani ports expansion at Emnore Creek, Tamil Nadu, the Pattuvam Mangrove Protection Movement in Kerala, and the Save Sathabai campaign in Odisha underscore how grass-roots mobilisations have challenged mainstream development narratives.

However, environmental defenders face intimidation, surveillance and criminalisation which are antithetical to India's constitutional commitment to protect the rights to protest and association. New challenges also emerge as climate change is weaponised to justify "managed retreat" without participatory planning or safeguards for the displaced.

### Towards a rights-based framework

Recognition of climate migrants within national migration and urban planning policies is essential. There is a need for a rights-based approach that guarantees decent work, housing, education and health care. Labour codes must be revised to explicitly extend protections to climate migrants, especially in sectors such as construction and domestic work where informality is rampant. Similarly, coastal zone management must be revisited to prioritise ecological sustainability and community rights over commercial interests. India's commitment to achieving Sustainable Development Goal Target 8.7 – eliminating forced labour and ensuring decent work for all – is contingent upon addressing the new vulnerabilities created by climate displacement.

If climate change is the defining challenge of our era, responding to climate-induced displacement must be at the core of India's adaptation strategy. Protecting the rights, dignity, and livelihoods of those most impacted is not just an environmental necessity. It is a test of India's democratic and constitutional values.

## LETTERS TO THE EDITOR

### Plight of the poor

Are we a police state? In Tamil Nadu, the brutality unleashed by the police on Ajith Kumar, who was finished off on mere suspicion of being linked to an incident of some jewels

missing, defies all imagination. He was just a poor man working as a security guard in a temple. The poor are undoubtedly worse off in this so-called welfare state. The brutal custodial death evokes a

deep poignancy of the rights of the poor in India. One is reminded of Bernard Shaw's quote, "The greatest evils and the worst of crimes is poverty..." One also remembers Somnath Chatterjee, a Marxist and a

leading lawyer, saying "there is no respite for the poor in India". It is not enough that the Ministers console the family which has been shattered. N.G.R. Prasad, Chennai

**Musk vs Trump or more?** Elon Musk has caused more than a ripple in American politics. Yet, one must ask whether his political move is a fight for ideals or personal vendetta. We wait to see whether it will

reshape politics or fizzle out as a fleeting tempest.

R.K. Jain, Baranasi, Madhya Pradesh

Letters emailed to letters@thehindu.co.in must carry the postal address and the full name.



# Ahead of COP30, Bonn climate talks fumble the pressure test

The gathering set the groundwork for COP30 in Brazil. Beyond setting the agenda, the talks could be considered a litmus test to gauge how seriously countries are committed to implementing past pledges and how prepared they are to scale up ambition in the face of a shrinking climate window

Indu K. Murthy

**A**s the world braces for another climate summit in November this year, the Subsidiary Bodies meeting in Bonn, Germany, brought together negotiators, scientists, policymakers, and civil society actors to tackle the complex, behind-the-scenes work that shapes the outcome of the Conference of the Parties (COP) summit.

Held annually in Bonn, this mid-year gathering sets the technical and political groundwork for the ensuing COPs, with the 30th Session of the COP (COP30) scheduled for later this year in Belém, Brazil. Beyond setting the agenda, Bonn could be considered a litmus test to gauge how seriously countries are committed to implementing past pledges and how prepared they are to scale up ambition in the face of a rapidly closing climate window.

Sadly, this year's Bonn conference was marked by delays, deep disagreements, and mounting frustration, especially over procedural priorities and climate finance. As global temperatures continue to break records, the urgency to act was palpable — as was the resistance to revisiting entrenched political differences.

## Delayed start, deep divisions

The conference got off to a slow start as agenda adoption, a procedural step, was stalled by disputes over finance and trade measures. The Like-Minded Developing Countries (LMDCs), including India, demanded the inclusion of Article 9.1 of the Paris Agreement, which obligates developed countries to provide climate finance and unilateral trade measures, such as carbon border taxes, on the agenda. India, along with the LMDCs, continues to see carbon border taxes as unfair, undermining principles of equity and common but differentiated responsibilities.

Both these propositions were opposed by developed nations, particularly the European Union, which argued that finance issues were being addressed under other agenda items. Eventually, a compromise was reached to address these issues: not as standalone agenda items but through informal consultations. Disappointed with developed countries' reluctance to discuss the legal obligations to provide financial support to developing countries, the LMDCs stated their intention to revisit this contentious issue at COP30.

This prolonged deadlock delayed the start of formal negotiations by nearly two days and underscored the persistent divide. While developing nations pushed for historical responsibilities to be acknowledged and operationalised, developed countries advocated forward-looking frameworks and voluntary support mechanisms.

## An elusive agreement

One of the most intensely negotiated themes at Bonn was the Global Goal on Adaptation, which aims to reduce vulnerability to climate change, enhance adaptive capacity, and strengthen resilience. There were also discussions on integrating the National Adaptation Plan progress into the goal, which the G77+China rooted for.

One of the key drawbacks of the goal thus far has been the lack of metrics. At Bonn, about 490 indicators from a list of nearly 9,000 were shortlisted, with the aim of consolidating them further to about 100. These indicators will be used to track adaptation actions under health, water, agriculture, and infrastructure, among others. India emphasised that adaptation must not be assessed through a uniform lens and backed indicators that are flexible, context-sensitive, and don't overburden national reporting.

However, differences and tensions arose over whether and how to include indicators on the means of implementation, including finance, capacity, and technology transfer. Many developing countries and regional blocs, such as the African Group and Independent Alliance of Latin America and the Caribbean (AILAC), stressed that without finance-related indicators, adaptation efforts will remain an unfunded mandate.

However, countries like Japan and Australia pushed back against including finance-related indicators. Additionally, the African Group and AILAC were opposed to including indicators to track domestic finance allocation and development assistance, while Australia supported their inclusion, emphasising the importance of tracking national adaptation processes.

The process to refine indicators was



Members of the G-77/China huddle to find a way forward on the Global Goal on Adaptation, on June 26. ISD/ENB - KARA WORTH

thus contentious. Countries including Australia warned against micromanaging expert groups tasked with technical work, while others demanded clear guidance and tight timelines. Towards the end of the conference, parties agreed on a globally applicable headline indicator set, which would be complemented by regionally or nationally tailored context-specific sub-indicators. Guidance on indicators to reflect the means of implementation wasn't agreed on, however.

## 'Safe space' debate

The Mitigation Work Programme (MWP) — created to scale up action to meet the 1.5°C target — also came under scrutiny. While many parties acknowledged the usefulness of dialogues under the MWP, several questioned its ability to deliver actual emissions reductions.

The debate between parties was on how a constructive and inclusive environment, a.k.a. safe space, could be provided for the MWP discussions: some advocated a push to ramp up ambitions, while others wanted to limit their scope. Developing countries emphasised that many of them have already set ambitious Nationally Determined Contribution (NDC) targets but lack the financial and technical support to implement them.

The LMDCs, including India, and the African and Arab Groups, warned against the MWP being used to impose new commitments and urged that it remain a facilitative, non-punitive process. The Philippines called for the MWP to facilitate, promote, and enhance international cooperation.

Further, a proposal was made to develop a digital platform to share mitigation tools and experiences. While Brazil, supported by Egypt, argued that this could help connect fragmented initiatives, the Alliance of Small Island States and the EU cautioned about the duplication of existing platforms, which could take attention away from scaling up ambitions.

## L&D, just transition, gender

The review of the Warsaw International Mechanism on Loss and Damage (L&D) made some headway, with proposals emerging on integrating L&D into NDCs and streamlining technical assistance. However, funding gaps and questions

**This year's Bonn conference was marked by delays, deep disagreements, and mounting frustration, especially over procedural priorities and climate finance. As global temperatures continue to break records, the urgency to act was palpable, as was the resistance to revisiting entrenched political differences**

about how the Santiago Network — a UN initiative linking vulnerable developing nations with technical support to tackle climate impacts, focusing on loss and damage reduction — would operate continued to cloud consensus.

In this session, interventions by observers emphasised the need to consider non-economic L&D, scale up finance, and align L&D efforts with human rights obligations. India and other developing countries called for streamlining access to technical support and adequate and scaled-up funding for responding to climate-induced losses.

In discussions under the Just Transition Work Programme, parties emphasised that just transition must be anchored in equity, development rights, and national contexts. Social dialogue, labour rights, and meaningful stakeholder engagement, especially that of Indigenous Peoples, were highlighted as foundational to just transition. Parties also flagged the economic impacts of unilateral measures, such as carbon border taxes (tariffs imposed on imported goods based on their carbon footprint) and trade barriers, and the role of critical minerals in energy transition. Parties agreed to address these issues through linked agenda items, and this would remain a bone of contention at COP30.

A new dispute emerged at Bonn in connection with the development of a new Gender Action Plan. There were differences of opinion on terminology (gender diversity and intersectionality). Key areas of focus proposed for the Plan included unpaid care work, sexual and reproductive health, and addressing gender-based violence, signalling the need for a framework that responds to evolving realities. In this context, the roles of gender-disaggregated data, traditional

knowledge systems, and gender-responsive budgeting were also discussed.

## Climate finance gridlock

Climate finance loomed large across almost every negotiation track. The issues of how much funding is available, where it is going, where it will go, and how predictable it is remained a recurring theme across discussions on adaptation, mitigation, and L&D.

The presidency-led consultation on the 'Baku to Belém' roadmap aims to operationalise a target to mobilise \$1.3 trillion annually in climate finance. But deep disagreements emerged over the structure of finance — grants vs. loans, public v. private, and mitigation v. adaptation — and who should be held responsible for raising the money.

Developing countries pushed for transparent and clear burden-sharing frameworks among developed countries, with the G77 and China calling for tackling systemic barriers to finance.

Small Island Developing States, represented by AOSIS, demanded earmarked and fast-disbursing funds tailored to their unique vulnerabilities. The Least Developed Countries sought a tripling of adaptation finance by 2030 compared to 2022 levels and a greater reliance on grants. Several groups, including AILAC, the Environmental Integrity Group, and the Arab Group, also stressed the importance of tracking progress; scaling non-debt instruments; and innovating revenue streams, such as taxes on financial transactions. The EU noted the need for the roadmap to be a transparent platform engaging external stakeholders and building on existing initiatives.

Taken together, these inputs reflect a clear call for an inclusive and accountable roadmap that's responsive to diverse regional needs.

Meanwhile, concerns emerged over the credibility of ex-ante finance reporting by developed countries on their planned financial contributions, per Article 9.5 of the Paris Agreement. Several developing countries highlighted discrepancies between planned or promised contributions and actual disbursements and called for reforms to improve transparency and accountability.

On the service arrangements of the Adaptation Fund, parties led by AOSIS requested that the World Bank, currently an Interim Trustee of the Fund, be named the Permanent Trustee of the Adaptation Fund.

With COP30 in Belém just months away, the Bonn Climate Conference was both a teaser and a pressure test. On the positive side, parties made incremental progress on technical workstreams like adaptation indicators, transparency frameworks, and Article 6 (on cooperative mechanisms). But the underlying political tensions around equity and finance remain unresolved. Bonn 2025 reaffirmed that while the science is unequivocal, politics will determine the pace of action.

(Indu K. Murthy leads the Climate, Environment, and Sustainability sector at the Centre for Study of Science, Technology and Policy, a research-based think tank. [indukmurthy@cstep.in](mailto:indukmurthy@cstep.in))



Sanitation workers cleaning a road are enveloped by smog in Gurugram, FTI

## Air pollution tied to preterm births, low birth weight in India: study

Geetha Srimathi

Air pollution, a hazard endured everyday by millions across India in varying degrees, has long been associated with a range of respiratory diseases, heart conditions, and a growing list of health issues. Now, a new study reveals the damaging effects of air pollution extend far beyond the lungs and heart, affecting people before they are even born.

Published in *PLoS Global Public Health*, the study was carried out by researchers from institutions in India, Thailand, Ireland, and the UK, with data from the National Family Health Survey (NFHS) along with satellite data. The team assessed the influence of ambient air quality on birth outcomes, specifically preterm births (PTB) and low birth weight (LBW). The dataset included children aged 0 to 5 years; 52% were female and 48% male.

The results suggest that exposure to fine particulate matter (PM<sub>2.5</sub>) during pregnancy significantly increases the likelihood of these adverse outcomes. PM<sub>2.5</sub> consists of airborne particles less than 2.5 micrometres in diameter.

According to the study, mothers exposed to increased levels of PM<sub>2.5</sub> had a 70% higher chance of delivering prematurely compared to those who weren't exposed. The odds of giving birth to a baby with low birth weight rose by 40% for mothers who faced higher air pollution levels.

## Northern states at higher risk

A particularly significant finding in the study is the regional disparity: specifically, Delhi, Punjab, Haryana, Uttar Pradesh, and Bihar bear the brunt of the consequences of air pollution. These regions are known for being heavily industrialised with high vehicular emissions and the widespread use of solid

**Higher PM<sub>2.5</sub> during pregnancy increased the likelihood of both LBW and PTB by 1.37x and 1.67x, respectively, with even a slight rise in temperature linked to an increase in LBW cases**

fuels for cooking.

This conclusion aligns with previous reports. Another recent study in *The Lancet* reported that the average PM<sub>2.5</sub> concentration in Delhi was 13.8-times higher than that in Kerala.

PTB was most prevalent in Himachal Pradesh (39%) and Delhi (17%), while LBW was most common in Punjab (22%) and Delhi (19%). Female children were more likely to be born with LBW (20%) compared to males (17%) — although both conditions were found to be more frequent among children of illiterate and poorer mothers.

Households that used solid fuel to cook also reported higher rates of both LBW and PTB.

Higher levels of PM<sub>2.5</sub> during pregnancy significantly increased the likelihood of both LBW and PTB by 1.37x and 1.67x, respectively, with even a slight rise in temperature linked to an increase in LBW cases, though not PTB.

Higher temperatures have previously been linked to maternal dehydration, heat stress, and increased cardiovascular strain, all of which impair placental function and disrupt foetal growth. Conversely, excessive rainfall, especially during the monsoon, raises the risk of waterborne infections, which can further hinder foetal growth, the study suggests.

Flooding and displacement associated with heavy rains can also disrupt healthcare access, leading to delayed medical interventions and increasing the likelihood of pregnancy complications.

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## CACHE



**Space war:** U.S. President Donald Trump makes an announcement regarding the Golden Dome, next to U.S. Defence Secretary Pete Hegseth, in the White House in Washington, D.C., U.S., on May 20. REUTERS

## On the Golden Dome: how Trump's missile shield tests space law

Such a shield would involve deploying a constellation of satellite interceptors, potentially armed with kinetic or directed-energy weapons, to form a protective layer over the U.S. This has left India, a key U.S. partner in space situational awareness, tactically aligned but normatively conflicted

Shrawani Shagun

From golden citadels to divine shields, rulers across time have dreamt of impregnable security. But in every age, these ambitions have either collapsed under their own weight or have provoked greater instability. In 2025, this ancient dream went to orbit.

In May, U.S. President Donald Trump unveiled a bold new national defence initiative called the "Golden Dome", a \$175-billion space-based missile shield designed to fend off ballistic, hypersonic, and orbital threats. The plan involves deploying a constellation of satellite interceptors, potentially armed with kinetic or directed-energy weapons, to form a protective layer over the U.S.

Framed as a defence move, the project has sparked concerns worldwide for its geopolitical ramifications as well as for its implications under international space law. In particular, the Golden Dome challenges the Outer Space Treaty's limits, raises constitutional concerns within the U.S., and puts pressure on key strategic partners such as India.

### Loophole or legal red line?

At the heart of the legal debate is Article IV of the Outer Space Treaty (OST), 1967. It prohibits placing "nuclear weapons or other weapons of mass destruction" in orbit or stationing them "in outer space in any other manner". It further mandates that celestial bodies shall be used "exclusively for peaceful purposes".

The language of Article IV, particularly its explicit focus on Weapons of Mass Destruction (WMDs), has created a loophole for conventional weapons in space. The term "peaceful purposes" has been subject to various interpretations, with some nations claiming that it permits all non-aggressive military use, while others insist it implies complete demilitarisation.

The treaty further states: "The

establishment of military bases, installations and fortifications, the testing of any type of weapons and the conduct of military manoeuvres on celestial bodies shall be forbidden." The use of military personnel for scientific research or any other peaceful purposes isn't prohibited, however. The use of any equipment or facility necessary to peacefully explore the moon and other celestial bodies is also not prohibited (Article IV).

Because the Golden Dome's interceptors are not classified as WMDs, they don't violate the letter of Article IV per se. There are a few concerns nonetheless. In arms control, the practical outcome must always take precedence over the technical details or official classifications of a weapon. This means what a weapon is called matters far less than its actual strategic effect.

For instance, if kinetic interceptors are used to disable or destroy missiles or satellites, their impact could fundamentally alter the balance of power in space. This capability could create a dangerous first-strike advantage for one nation, thereby eroding the principle of mutual deterrence, which relies on the threat of retaliation to prevent an attack. Such a development would undermine the core goal of arms control treaties, which is to foster stability through restraint, and could trigger a significant and destabilising shift in the dynamics of power in outer space.

UN General Assembly resolutions under the Prevention of an Arms Race in Outer Space (PAROS) Treaty, while lacking legal enforceability, have successfully established an interpretive norm against the militarisation of space. The deployment of space-based interceptors, therefore, directly threatens this norm and could trigger a cascade of similar actions by other nations.

These systems are plagued by dual-use ambiguity. A kinetic interceptor, ostensibly for missile defence, possesses

the inherent capability to be instantly repurposed to neutralise an adversary's vital communication or surveillance satellites. This inherent uncertainty risks inflaming suspicion and driving miscalculation, especially during heightened crises involving major space powers like China and Russia, both of which have already explicitly condemned the proposed deployment.

### Partners in crossfire

India, a rising space power and a key U.S. partner in satellite tracking and space situational awareness, now finds itself tactically aligned but normatively conflicted. Quiet cooperation in areas like debris monitoring could tacitly link India to the Golden Dome's strategic ecosystem. However, India is also a vocal champion of peaceful space use. It has consistently supported PAROS resolutions and has positioned itself as a leader of the Global South in advocating for equitable and demilitarised space governance.

Supporting or even appearing to tolerate the Golden Dome could undermine that credibility, damaging India's image as a responsible spacefaring nation and a potential norm-setter in future treaty negotiations. Conversely, non-cooperation might strain its growing strategic ties with Washington. This dilemma becomes even more consequential in the context of India's pending Space Activities Bill, which will shape how the country defines and regulates dual-use platforms, private-sector participation, and treaty compliance.

The Golden Dome is thus more than a U.S. policy issue: it's a litmus test for India's own legal and diplomatic posture and could significantly influence the direction and content of the Space Activities Bill.

### Less than golden precedent

The broader concern is that the Golden Dome will normalise the weaponisation

of outer space. If the U.S. crosses this threshold without facing legal repercussions, China, Russia, and other actors are likely to follow suit. This could trigger a destabilising cycle of orbital arms races, forcing smaller nations to resort to asymmetric capabilities, such as cyberattacks, jamming or even the deliberate generation of debris in orbit.

Such developments would not only weaken the OST's authority but could also unravel the fragile consensus that has governed space for over half a century. In the absence of updated and enforceable treaties, outer space risks becoming a legal grey zone or, worse, a battlefield governed by force rather than law.

Thus, the Golden Dome is more than a military gamble or a political spectacle. It's a legal inflection point for space governance in the 21st century. It exposes loopholes in a 58-year-old treaty, reveals structural weaknesses in domestic oversight, and underscores the urgent and immediate need for modern legal instruments that can keep pace with technological realities.

Strategic partners, such as India, along with like-minded spacefaring nations, should notably push to clarify and modernise the OST, especially the parts pertaining to dual-use and conventional space-based weapons. Advocacy for legally binding instruments on the non-deployment of weapons in space is of paramount importance. This pursuit of international agreements, which play a crucial role, should be complemented by establishing comprehensive transparency mechanisms for military space projects to reduce ambiguity and mistrust.

It's also crucial that national laws, such as India's Space Activities Bill, include clear guidelines for defence cooperation in space, fostering responsible practices both domestically and globally.

Shrawani Shagun is pursuing a PhD at National Law University, Delhi, focusing on environmental sustainability and space governance.



### FROM THE ARCHIVES

## Know Your English

K. Subrahmanian  
S. Upendran

"Last week you talked about the expression 'throw someone for a loop'."

"Yes, that's right."

"Well, Sujatha says it's wrong. She says that the expression is 'in the loop'."

"In the loop' and 'throw someone for a loop' have two different meanings. When you throw someone for a loop, you..."

"...you surprise or confuse someone. I know that."

"I'm glad you remember. When you say that someone is 'in the loop', it means that the person is 'part of a group of people who make decisions about important subjects'."

"So, if a person is 'in the loop', he/she is part of an inner circle. Is that what you are saying?"

"Exactly! For example, I can say, if you want to know what's happening, ask Rajagopal. As the chairman of the Board, he is in the loop."

"Our local MLA hasn't a clue as to what the Chief Minister is up to. I don't think he is in the loop."

"Good example. Do you know what the opposite of 'in the loop' is?"

"Is it 'off the loop'?"

"No, it's 'out of the loop'. You could have said our local MLA is out of the loop on policy decisions."

"Everyone at school knows that the Vice-Principal is out of the loop."

"The Finance Minister claims that he was out of the loop and doesn't know who gave the order to increase the price of petrol."

"If the Finance Minister was out of the loop, who was in the loop, then?"

"Good question. Anyway, that was just an example. I hope that the present Finance Minister is in the loop, not out of it."

"So does everyone else in the country. By the way, did you look at the photographs that my father took last week?"

"I saw them. I didn't really look at them. Why do you...?"

"...wait a minute! You mean to tell me there is a difference between 'look at' and 'see'?"

"Yes, there is. When you 'look at' something, you pay attention to what you are seeing."

"In other words, you concentrate."

"Exactly. Whatever you do, you do so deliberately. For example, I looked at the painting for half an hour."

"I looked at the little girl crossing the street — in this case, it would mean that I paid particular attention to her?"

"That's right. If on the other hand, you say 'I saw the young girl cross the street', it could mean that you accidentally saw the girl."

"What do you mean accidentally?"

"It means that you weren't paying any particular attention to her. She just happened to come in your line of vision, so you ended up seeing her."

"But tell me, is there a difference between 'look at' and 'watch'? I mean, can I say..."

"...yes, there is a difference between 'watch' and 'look at'. But we'll talk about it next time."

Published in The Hindu on March 4, 1997.

### THE DAILY QUIZ

## With South African captain Wiaan Mulder scoring an unbeaten 367 on Monday, a quiz on triple centurions in Test cricket

V.V. Ramanan

### QUESTION 1

As of July 7, 2025, 29 batters have notched up 33 triple centuries. Who was the first to achieve the feat?

### QUESTION 2

Apart from Don Bradman and Virender Sehwag, which other batters have scored two triple tons in Tests?

### QUESTION 3

Like Mulder, name the two Asian stars who were also helming their team while getting a triple hundred?

### QUESTION 4

In a rare occurrence, the teams that played in the first two England-India Tests in the current series had a batter who had scored a 300+ for his team. Name both.

### QUESTION 5

What connects Headingley in Leeds and Antigua Recreation Ground in St. John's?

### QUESTION 6

What is common to the triple tons scored by Graham Gooch, Sanath Jayasuriya, Michael Clarke and Brendon McCullum?



**Visual questions:** This image is from the 319 notched up by Virender Sehwag in 2008. What is special about the knock? V. GANESAN

### Questions and Answers to the previous day's daily quiz 1:

This revolutionary group in Bengal served as a militant wing of the Anushilan Samiti. **Ans: Jugantar**

This revolutionary died fighting British forces on the banks of the Buribalam river in Odisha in 1915. **Ans: Bagha Jatin (Jatindranath Mukherjee)**

The Chittagong Armoury Raid of 1930 was led by which this revolutionary. **Ans: Surya Sen**

This revolutionary was hanged for the Writers' Building attack in 1931. **Ans: Dinesh Gupta**

This person founded the Communist Consolidation, a political group formed by inmates of the Cellular Jail in 1935. **Ans: Hare Krishna Konar**

Acharya's dissatisfaction with Congress politics led him to write for this leftist publication. **Ans: Freedom (an anarchist periodical)**

The legal charge against the defendants in the Meerut Conspiracy Case under the Indian Penal Code. **Ans: Section 121A — Conspiracy to wage war against the King**

Visual: Identify this man. **Ans: Asaf Ali**

Early Birds: Nobody got all the correct answers

### Word of the day

#### Desultory:

marked by lack of a definite plan or regularity or purpose; jumping from one thing to another

**Usage:** A few people were dancing in a desultory fashion.

**Pronunciation:** newsth.lve/desultorypro

#### International Phonetic Alphabet:

/des.ʌlt(ə).jɪ/, /dez.ʌlt(ə).jɪ/

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# Law on phone-tapping, and two HC rulings

In separate cases, the Delhi and Madras High Courts looked into whether the government can tap phones of suspects before a crime is committed

**AMALA SHEIKH**  
NEW DELHI, JULY 7

CAN THE government tap the phones of suspects to gather evidence before a crime is committed? Last week, in two separate cases, the Madras and the Delhi High Courts gave varying answers to this question.

What is the law on phone tapping in India, and how have High Courts interpreted it?

## The law on tapping

The government's powers to intercept communication is laid down in — and circumscribed by — three pieces of legislation. The Indian Post Office Act, 1868 allows for the interception of communication through post.

■ The Indian Telegraph Act, 1885 is used for tapping voice calls; and

■ The Information Technology Act, 2000 governs the interception of WhatsApp messages, emails, etc.

The 140-year-old Telegraph Act was originally

meant for intercepting telegrams, but over the years it has been expanded to include telephonic conversations. Section 5(2) of the Act states that both state and central governments can, "on the occurrence of any public emergency, or in the interest of the public safety," authorise interception.

Given that the right to free speech and the right to privacy are fundamental rights, any encroachment on these rights through surveillance is only permissible on narrow constitutional grounds.

These grounds — the interest of the sovereignty, integrity of India; the security of the state; friendly relations with foreign states; public order; or preventing incitement to the commission of an offence — are enumerated as "reasonable restrictions" under Article 19(2) of the Constitution.

Section 5(2) of the Act also mentions these grounds for authorising interception. For actions to be deemed a threat to "public emergency, or in the interest of the public safety" and allow for interception, they have to necessarily fall into one of the reasonable restrictions.

## The High Court rulings

Both the Madras and Delhi High Court cases involved "preventing incitement to the commission of an offence," which is one of the valid grounds in law for authorising phone tapping.

Both courts separately examined the nature of economic offences to determine if they could be deemed as "public emergency" or "public safety." While the Delhi High Court upheld the interception order, the Madras High Court quashed it.

**DELHI HC:** On June 26, the Delhi High Court rejected the plea of an accused who challenged a trial court's order accepting evidence gathered by the Central Bureau of Investigation (CBI) through phone-tapping.

The case related to the accused allegedly seeking to secure a sub-contract for the redevelopment of the ITPO complex into an Integrated Exhibition-Cum-Convention Centre through corrupt means. In 2017, the Ministry of Home Affairs (MHA) had author-

ised interception of his phone on the suspicion that he was attempting to bribe a public official.

Justice Amit Mahajan stated in his order that given the contract was for Rs 2,149.93 crore, "the economic scale of the offence, in the opinion of this Court, satisfies the threshold of public safety."

The threat posed by corruption cannot be understated. Corruption has a pervasive impact on a nation's economy and the same can impact anything from infrastructural development to resource allocation. Corruption by a public servant has far-reaching consequences as it serves to not only erode public trust and cast aspersions on the integrity of public institutions, but also renders the public at large susceptible and vulnerable by threatening the economic safety of the country," the High Court said.

**MADRAS HC:** The Madras High Court on July 2 quashed an interception order issued by the MHA in 2011 for intercepting the

phone of an accused in a bribery case. The accused was allegedly attempting to pay a bribe of Rs 50 lakh to a senior Income Tax officer to help the accused hide undisclosed taxable income.

Justice Anand Venkatesh in his order stated that a "public emergency" must be construed narrowly. In the petitioner's case, the MHA's objective to deal with tax evasion would not qualify as a "public emergency" under Section 5(2) of the Act, the court said.

The court also flagged in its order a press note that was released by the Press Information Bureau in April 2011, four months before the MHA order, saying that the law does not allow the monitoring of conversations through phone-tapping "to merely detect tax evasion".

Additionally, the court said that the phone-tap was unlawful since it did not comply with the procedural standards set by the Supreme Court in a 1997 ruling.

Once a phone-tap order is declared unlawful, any information gathered through the tap cannot be treated as evidence in a court of law.

## Procedural norms

In its landmark 1997 ruling in *People's Union Of Civil Liberties vs Union Of India*, the Supreme Court examined the constitutional validity of Section 5(2) of the Telegraph Act. While it upheld the law, the court laid down procedural safeguards for its application.

The SC said that an order for phone tapping can be issued only by the home secretary of the state and central governments, and that this power cannot be delegated to officers below the rank of joint secretary.

The authorising authority must also consider whether the information could "reasonably be acquired by other means".

Within two months of ordering a phone tap, a committee comprising the cabinet secretary, the law secretary and the telecom secretary shall review the order. At the state level, the committee shall comprise the chief secretary, law secretary and another member other than the home secretary.

The scrutiny by the board has also been included under Rule 419-A (17) of the Telegraph Rules.

## EXPLAINED GLOBAL

### ALL ABOUT THE UAE'S NEW GOLDEN VISA SCHEME FOR INDIANS

THE UNITED ARAB EMIRATES (UAE) government has introduced a new type of golden visa for residents of India and Bangladesh who seek life time residency in the country.

The new program, which is based on nomination, will award the UAE's golden visa for life for a fee of AED 100,000 (around Rs 21.3 lakh), PFI reported. It will also do away with the current requirement of investing in property whose value should be at least AED 2 million (Rs 4.66 crore), or investing a large sum in business in the UAE.

#### What are golden visas?

Individuals seeking to migrate to a country are typically required to fulfil criteria such as a minimum educational qualification and/or an offer letter from a company to work there. This process can be tedious and might take years.

A golden visa bypasses such requirements, and hinges on an individual's ability to pay a significant sum of money to the host country, which can be in the form of investments in government bonds and real estate, etc.

Some countries offer a "golden passport", which is another route to gain citizenship by investment.

#### What is the UAE's golden visa scheme?

The UAE's golden visa awards residency in the country for a period of between five and 10 years to eligible candidates without the need for a sponsor.

It allows "residents, foreign expatriates and their families to come to work, live and study in the country, and to have the possibility of enjoying a long-term residency", according to the website of the UAE's Federal Authority for Identity, Citizenship, Customs & Port Security.

To receive the golden visa, candidates should be public investors, investors in real estate or entrepreneurs. "Eminent persons" such as doctors, scientists,



PM Modi and UAE's President Sheikh Mohammed bin Zayed Al Nahyan in 2017. Reuters

artists, and athletes can also apply.

#### So what has changed now?

Sources told PFI that the new nomination-based program will award golden visa holders with lifetime residency in the UAE, as opposed to the current policy of between five and 10 years. For instance, golden visa-holders in the real estate investor category may only enjoy residency status for the duration of their project.

Applicants under the new program can obtain the approval for the golden visa from their country and do not have to visit Dubai, Rayad Kamal Ayub, managing director of the Rayad Group consultancy, which has been entrusted with testing the pilot phase of the program, told PFI.

"After getting the Golden Visa, one gets the freedom to bring his or her family members to Dubai," he said.

The consultancy will check the applicant's background, including anti-money laundering and criminal record checks, and their social media.

"The background check will also show if and how the applicant can benefit the UAE's market and business activities in any other way, such as culture, finance, trade, science, start-ups, professional services, etc," Rayad Kamal said.

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29 July   8:00 AM	26 Aug   11:30 AM
30 July   8:00 AM	27 Aug   11:30 AM
31 July   8:00 AM	28 Aug   11:30 AM
1 Aug   8:00 AM	29 Aug   11:30 AM
2 Aug   8:00 AM	30 Aug   11:30 AM
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**ALIND CHAUHAN**  
NEW DELHI, JULY 7

HOW WAS the Milky Way formed? Does our Solar System have a ninth planet? Is there an asteroid that can pose a threat to Earth? What are dark energy and dark matter?

These are some of the questions that the Vera C Rubin Observatory, which released its first test images last month, is expected to answer. Located 8,684 feet above sea level atop the Cerro Pachón mountain in the Chilean Andes, the observatory will provide comprehensive images of the night sky unlike anything astronomers have seen before.

## A technical marvel

The centrepiece of the observatory is the Simonyi Survey Telescope. This device is unique for three main reasons.

**WIDE FIELD OF VIEW:** Astronomers typically use the size of the visible surface of the full Moon to describe a telescope's field of view. The Hubble Space Telescope observes around 1% of the full Moon's disc, and the James Webb Space Telescope around 75% — using such telescopes is like looking into space through a straw.

The Rubin's telescope, however, is so wide-eyed that it effectively observes an area of the sky equivalent to at least 40 full Moons arranged next to one another. This is made possible due to its distinct design comprising three differently curved mirrors: a primary mirror with a diameter of 8.4 metres, a secondary mirror with a diameter of 3.5 m, and a tertiary mirror with a diameter of 5 m.

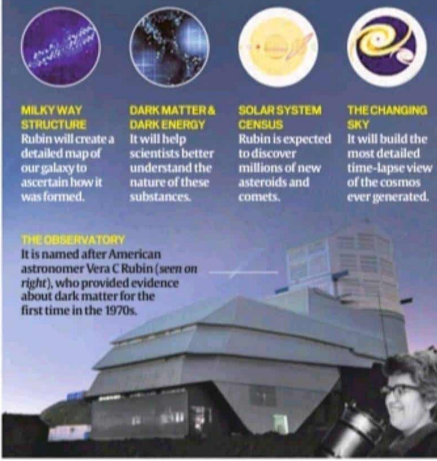
The primary mirror captures celestial light and reflects it upward to the secondary mirror. The secondary mirror then bounces the light to the tertiary mirror, which is the inner part of the primary mirror. From here, the light is sent up into a camera at the centre of the secondary mirror. This complex light path allows the camera to capture a large slice of the sky in a single image.

**LARGEST DIGITAL CAMERA:** The telescope has the largest digital camera in the world. It is the size of a small car, weighs 2,800 kg, and boasts a staggering resolution of 3,200 megapixels (the latest iPhone 16 Pro Max has a 48-megapixel camera). The camera can produce an image so rich in detail that it would take a wall of 400 ultra-high-definition TV screens to display it in full.

Also, the telescope is designed in such a

## WHAT OBSERVATORY IN CHILE WILL EXPLORE

Rubin's Simonyi Survey Telescope, which has the world's largest camera, can observe an area of the sky equivalent to 40 full moons arranged in a line



**MILKY WAY STRUCTURE**  
Rubin will create a detailed map of our galaxy to ascertain how it was formed.

**DARK MATTER & DARK ENERGY**  
It will help scientists better understand the nature of these substances.

**SOLAR SYSTEM CENSUS**  
Rubin is expected to discover millions of new asteroids and comets.

**THE CHANGING SKY**  
It will build the most detailed time-lapse view of the cosmos ever generated.

**THE OBSERVATORY**  
It is named after American astronomer Vera C Rubin (seen on right), who provided evidence about dark matter for the first time in the 1970s.

way that the camera's image sensors (which convert light into electrical signals that form digital images) will help scientists spot objects 100 million times dimmer than those visible to the naked eye. This makes the camera sensitive enough to capture a candle from thousands of kilometres away.

The camera has six filters designed to capture light from different parts of the electromagnetic spectrum. This will help astronomers gather information about various celestial objects based on the type of light they emit. For instance, young and hot stars emit ultraviolet light, whereas faint and distant red galaxies appear in infrared light.

**RAPID MOVEMENT:** It is not easy to move large telescopes. They usually take

around 10 minutes to adjust their position so as to ensure that sensitive components do not wobble around during the movement. Scientists have to plan what they want to observe, and when, in advance.

The Simonyi Survey Telescope is the fastest-slewing telescope in the world, and takes just five seconds to move and settle from one target to another. This speed is due to the telescope's compact structure (owing to the three-mirror design), and its mount which floats on a film of oil.

Such speed will allow the telescope to snap up to 1,000 images a night, meaning it can capture the whole sky in just three days. Unlike other observatories, scientists at Rubin will not have to choose their targets.

"In a traditional observation, you decide on a target in a part of the sky and you take your telescope there. As we [the Rubin Observatory] are going to scan the whole sky, we will not start from a standard point A, and then move sequentially to different positions. We have instead built a script that will decide where to point at what time in the night," Kshitija Kelkar, a senior operations specialist at the Rubin Observatory, told The Indian Express on a video call.

## Revolution in making

The Vera Rubin Observatory will constantly scan the sky of the southern hemisphere for 10 years, gathering 20 terabytes of astronomical data each night. The observatory's software will automatically compare new images with older ones and generate an estimated 10 million alerts per night for each change detected in the sky.

Scientists hope that this treasure trove of data will help solve some of the biggest mysteries of the universe, and discover numerous celestial objects such as comets and asteroids. On June 23, when the first test images of the observatory were released, astronomers at the Rubin Observatory said that its software had identified 2,104 brand-new asteroids — including seven near-Earth objects — with merely 10 hours of engineering data.

The observatory is expected to catalogue more than five million asteroids, and roughly 100,000 near-Earth objects over the next 10 years, tripling today's inventory. It will become fully operational by the end of the year.

Jake Kurlander, a researcher at the University of Washington, told Earth.com, "It took 225 years of astronomical observations to detect the first 15 million asteroids... Rubin will double that number in less than a year."

The observatory is expected to catalogue more than five million asteroids, and roughly 100,000 near-Earth objects over the next 10 years, tripling today's inventory. It will become fully operational by the end of the year.

Scientists have known about these entities for decades — the observatory is named after American astronomer Vera C Rubin, who provided evidence about dark matter for the first time in the 1970s — but not much is understood about dark energy and dark matter.

Kelkar said, "Rubin will be able to produce a very high definition map of the structure of the universe that is the best possible way to understand dark matter and dark energy."

# Behind record-breaking heat in Kashmir: long dry spells, rise in urbanisation

**BASHAARAT MASOOD**  
SRINAGAR, JULY 7

ON SATURDAY, the maximum temperature in Srinagar city reached a seven-decade high, and Pahalgam recorded its highest day temperature ever. This June was the hottest in the Kashmir Valley in almost five decades.

It rained at several places in the Valley on Monday, but the heat is expected to return. The Jhelum has gone dry in places, and most shops have run out of air conditioners. Why is this happening?

## Kashmir's climate

The Kashmir Valley has a temperate climate with four distinct seasons: spring, summer, autumn, and winter. Spring (March to May) and autumn (September to November) are usually pleasant. In winter

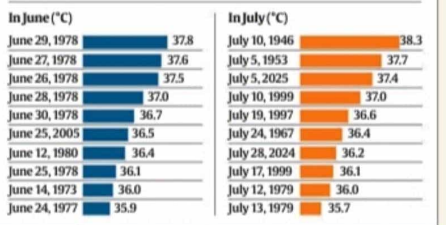
(December to February) temperatures fall below freezing, there is heavy snowfall in high-altitude areas, and moderate snow in the plains.

The maximum temperature in summer (June to August) can reach 36 degrees Celsius in the urban areas. In resort towns like Gulmarg and Pahalgam, the day temperature is around 30 degrees. Western disturbances bring rain from time to time, making it cooler. July and August are typically the hottest months.

**Changes of late**  
In recent years, Kashmir's weather has become increasingly erratic. Dry spells have become longer, and days hotter. In June, the hottest in half a century, day temperatures were about three degrees above normal.

The maximum temperature in the summer capital rose to 37.4 degrees, the highest since 1953, and the third-highest ever

## HOTTEST DAYS IN SRINAGAR IN JUNE AND JULY



Source: IMD

recorded in the city. The hottest day on the record is July 10, 1946, when the maximum rose to 38.3 degrees.

In Pahalgam, Saturday was the hottest day ever recorded, with the maximum temperature rising to 31.6 degrees, higher than

the 31.5 degrees last year.

## Reasons to worry

Independent weather forecaster Faizan Arif said the worry is the length of the hot spell in the Valley. "We have had higher temperatures in the past, but those were isolated incidents," Arif said. "This year, temperatures have consistently stayed above normal. Both maximum and minimum temperatures have remained elevated."

This is happening due to a combination of factors, the director of the India Meteorological Department in Srinagar, Mukhtar Ahmad, said.

"First, global warming is causing temperatures to rise worldwide," Ahmad said. "In Kashmir in the past, whenever temperatures crossed 35 degrees Celsius, rainfall would follow, bringing relief. But now we're seeing extended dry spells."

One of the main reasons for this is the reduced availability of water vapour, Ahmad said.

"Urban areas in the valley — especially Srinagar — have less green cover compared to the surrounding rural areas. Vehicular traffic and industrial activity further worsen the situation."

"This was the hottest June since 1978," Ahmad had told The Indian Express earlier. "The average day temperatures [for June] this year stood between 32 and 33 degrees Celsius. This was some three degrees above normal. The average maximum temperatures, too, have stayed on the higher side."



"After a decade of austerity, stagnant living standards and eroded institutional legitimacy, the country Sir Keir leads feels no longer patient – or stable – enough for the kind of policies he believes in. Whether he can change that, or is already being shaped by forces beyond his control, remains to be seen." — THE GUARDIAN

# THE IDEAS PAGE

## The Hindi in Hindutva

The language question is central to its politics. In Maharashtra and elsewhere, protests rooted in regional pride miss the bigger picture



SUHAS PALSHIKAR

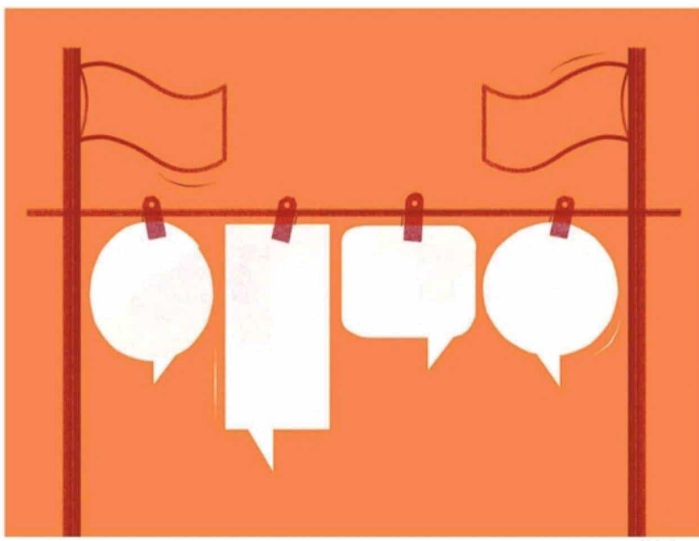
AFTER WEEKS OF twists and turns, the Maharashtra government has suspended its proposed policy of introducing Hindi as a compulsory language from the first standard in state schools. This may appear to be merely a state-level issue. Opposition to it may seem like a seasonal bout of opportunistic politics. It is neither. The pro-Hindi policy of the state government has been in line with the BJP's longstanding ambition to have Hindi (*shuddh* Hindi, not Hindustani) as the national language – a policy that dovetails with its penchant for enforcing uniformity in every respect and implementing a one nation, one language policy. The recent troubles over education policy in Maharashtra, therefore, need to be understood in a larger context, beyond pedagogic wisdom, state-level party politics and Marathi pride. These troubles amplify the debate over what we mean by the Indian nation, and in turn, the deeper, routine practices of majoritarianism.

When the Maharashtra government kept insisting on introducing Hindi in the first standard, only two responses against it seem to have mobilised public opinion in the state. One somewhat apolitical response has been about the wisdom of introducing three languages when a child begins her education. This argument is confined to the child's capacity to grasp multiple languages at an early age and the question of burden. The other response, predictably, was triggered by the pro-Marathi sentiment. This helped the estranged Thackeray cousins to share the same ideological ground after a long time. Sections of the media, and intellectuals who have always romanticised the idea that a strong pro-Marathi lobby would help the language, have naturally been excited over this second development concerning Marathi pride, so quick on the heels of Marathi being declared a classical language by the Narendra Modi government.

But there is not much awareness of the larger ideological implications of the pro-Hindi policy. This is not restricted to Maharashtra alone. Many administrators and policymakers have always remained somewhat narrow in their approach to the language question – looking at it only in terms of convenience, and therefore, reducing it to the question of official language or link language. For many of us, diversity is always a clumsy inconvenience.

The question of language, however, has always spilled over beyond administrative convenience to the realm of unity and nationhood. Thus, even within Congress, there always was a strong Hindi lobby that believed a common language was necessary for a nation and that Hindi could naturally claim that status. There were even some from the south in this lobby, and though they were not necessarily inclined to surrender their own linguistic traditions, they supported the idea of a national language – *rash-trabhasha*. That is why we had *rash-trabhasha* samitis pushing for Hindi education through voluntary efforts.

This idea that Hindi would gradually evolve to become a national language often overlapped with the imagination that a nation requires one common language. Among north India's Hindi lobby, this overlap was more pronounced. But that overlap was not exclusive to Hindi-speaking pro-Hindi activists. Where does this craving for a national language come from?



C R Sasikumar

During much of the time when India's national struggle was shaping up in the early 20th century, the more prominent model of nationalism in Europe often privileged uniformity over anything else. This had a deep influence on many Indian social and political activists and thinkers. But the Hindutva nationalism of V D Savarkar and the RSS most enthusiastically adopted the idea of uniformity. Many in Congress were attracted to it, but believed that such uniformity was either culturally inherent in India's practices or that it would evolve over time through persuasion and practice. Thus, two different models of uniformity operated in actual politics as India became independent. The more predominant one was uniformity through mutual exchange, give-and-take, and historical sharing, while the Hindutva vision believed in the primacy and urgency of uniformity over anything else. This applied to the language question, too.

Debates over Hindutva have often remained confined to the question of religion. But Hindutva as an ideology and politics should be understood not merely in terms of the Hindu-Muslim question. True, the practical politics of Hindutva obsessively revolves around, and is based on, deep Islamophobia, coupled with anti-minority sentiments and Hindu supremacy. But at the root of it is a more general imagination that democracy means a free play for the majority community. In the case of the language question, too, it would be a mistake to ignore this foundational belief that has shaped Hindutva. It is often argued that a certain percentage of people in India speak Hindi. It is another matter that this "number" is derived historically through amalgamating speakers of many other languages and claiming those languages as variants of Hindi – that is exactly how "majorities" are constructed, whether based on religion, language or culture. In the majoritarian project, some traits of one section of society are posited as common to most. It is then argued that all those who manifest those traits constitute one community, enjoying large numbers.

More recently, the systematic push in favour of making Hindi the official language

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True, the practical politics of Hindutva obsessively revolves around, and is based on, deep Islamophobia, coupled with anti-minority sentiments and Hindu supremacy. But at the root of it is a more general imagination that democracy means a free play for the majority community. In the case of the language question, too, it would be a mistake to ignore this foundational belief that has shaped Hindutva.

unofficially has been evident. While sometimes, the majoritarians hope for assimilation (*Samrasati*), they don't have the political patience to wait for that to happen. Majoritarian projects, when out of power, speak of assimilation in order to save themselves from state action, but when in power, exercise the same state power to enforce uniformity. Since the BJP knows that its coalition partners have nowhere to go, it nudges them to support the idea of uniformity on the question of language. A large electoral majority in Maharashtra has encouraged the BJP-led government to adopt the policy of enforcing Hindi while its domesticated allies in Andhra Pradesh talk of willingly adopting Hindi.

In withdrawing its controversial decision in Maharashtra, the BJP may have accepted a tactical retreat temporarily, but it knows that the Shiv Sena (UBT) and the Maharashtra Navnirman Sena neither comprehend nor want to counter the majoritarian project. With a soon-to-be-formed "expert committee", the state government will subsequently find ways of continuing with a majoritarian politics of enforced uniformity. Just like in Maharashtra, the BJP's pro-Hindi policy will receive only limited opposition elsewhere, be it in West Bengal or Tamil Nadu. That response will be in terms of regional identity, language protectionism and an anti-Hindi stance. Recent history shows that Hindutva has the capacity to absorb such regionalist tendencies at state level.

Thus, Maharashtra's protests against Hindi imposition will only produce a Marathi pride that is oblivious of the larger majoritarian project. That project will mostly go unchallenged as anti-Hindi politics will neither protect our linguistic diversity nor sensitise the public about the dangers of imposing uniformity. The day when votaries of regional languages appreciate the link between making one language "national" and making one culture national, we shall have a better handle to understand the politics of nationalism masquerading as the politics of a national language.

The writer, based in Pune, taught Political Science

## Understanding where we are

We need the social sciences to locate ourselves in the past and the present



PEGGY MOHAN

IN AN AGE when language and its link to antiquity are burning topics in India, I work on the languages of South Asia, looking through them to find the backstory of who we are, how we came to be the way we are, and where we are headed. Tucked into the sounds, words and grammars of our languages are clues about our history, the rise and fall of civilisations over the millennia, and the reactions of ordinary people on the sidelines of the great spectacle just living out their lives and unwittingly holding on to precious fragments of our past.

Early on, I began to see patterns: Many of our languages were mixed, but not randomly so. The words always seem to come from more recent groups who settled here, while sounds and grammar trace back much further, often all the way to the very first humans who came as settlers to the Subcontinent. By the time I sat down to write this up, geneticists were coming out with their own studies that pointed to a divided history, matching male DNA (Y-DNA) to known population influences over the ages, while the female line, the mitochondrial DNA, traced all the way back to the first humans to leave Africa about 70,000 years ago. The subsequent migrants to South Asia had mostly been... men.

Studying the evolution of new languages in South Asia had led me straight to those moments in time when our social environment changed abruptly because of migration, and new formations, and ultimately new civilisations, emerged.

These repeating patterns began to coalesce into a model, which saw long periods of stability that were "punctuated" by the sudden arrival of young men from other lands. Change, here, was not something gradual, a day-by-day "improvement". It was something "catastrophic", happening in an instant of time, an environmental "shock" that the society was unable to absorb.

Despite modern words like "development", which suggest an ideal goal and a scripted journey, what we see from the lives of older civilisations is that they craved a sort of stasis. When things are going well, they do not want major change. There is a certain inertia that keeps them going with what has worked for generations, even cushioning them against the early stages of decline. That is how, before the 12th century, the prakrit-speaking kingdoms across the north of the Subcontinent could keep plodding on, down but not out. Then, in the turbulent 12th century, they all broke like

dry twigs and were swept away by a new power group that came from Central Asia. As societies running only on fumes cling to old fantasies of stability, the pressure for adaptive change keeps building, gestating invisibly. And when the moment of turn is finally upon us, it takes us by surprise. This is because, at this scale of existence, the tempo of evolution is different. There is no long period of twilight when we get used to seeing a system in terminal decline. Like an alkaline battery, large systems like societies, the economy, the environment, or even languages run at full power till the very end, and then they "die" within a generation. This is what makes large systems so difficult to read.

At this very moment, we are in the middle of a major global reset, and the speed at which it is happening is enough to take our breath away. We in India have been "running on fumes", like traders taking comfort in yesterday's balance sheets, while around us in the outside world, the future is approaching at hypersonic speed and power equations are shifting. We are back in a 12th-century moment, when once again India as a civilisation is struck, hitching its wagon to a falling star, content to slide into insignificance while the rest of Asia is thinking many moves ahead in the game, planning and developing systems and technology for situations that are yet to arise.

This is what we can take it for granted that the 21st-century Asian ship has sailed without us. So maybe we should take a break and mull over where we went wrong, where we got derailed as a civilisation, and watch China chart its course, and get set for an age when it is old and spent and we get our turn. There is one major change we must make if we ever hope to "fire on all cylinders" the way China, Russia and Iran do: We must abandon the old elitist mode, where science and technology are effectively kept off limits to the vast majority of our population, leaving them out of a discourse that we conduct only in English, because we need their energy in order to be whole. And we must get back to "playing the long game", thinking in 20-year, 50-year, 100-year cycles.

This, in the end, is why in a world of ever-present tech we still need social sciences. The real value of our models is not that they tell us about our past, but that they let us read the signs and understand when the outwardly healthy systems we live in might actually be in distress, so that we can anticipate the future. Not that the future is wholly predictable. But thinking about it more rigorously, as social scientists, will keep us alert and proactive.

The writer taught Linguistics at Howard University, JNU and Ashoka University. She is the author, most recently, of *Father Tongue, Motherland: The Birth of Languages in South Asia*

## LETTERS TO THE EDITOR

### LET PEOPLE VOTE

THIS REFERS TO the editorial, "Election Omission" (IE, July 7). Bihar's ongoing Special Intensive Revision (SIR) of electoral rolls by the Election Commission of India (EC) has drawn criticism from political parties, and rightly so. The enormity of the task, the short duration, and the strict criteria for verification could result in the wrongful exclusion of lakhs of voters. Migrant workers are integral to the economic engines of several states. Their political voice should be more impactful in holding representatives accountable for their everyday challenges. The SIR must balance these principles.

Ankita Chalia, Kurukshetra

THIS REFERS TO the editorial, "Election Omission" (IE, July 7). In a state marked by high migration and poor documentation efforts, demanding exhaustive paperwork just months before an election is not just impractical, it is unjust. When the process prioritises procedural rigidity over lived realities, it no longer serves democracy. Excluding ration cards, Aadhaar, voter ID from acceptable documents only deepens the suspicion that the exercise lacks neutrality. The EC must take a step back.

Kholan Das, Kolkata

### A NEW TEAM

THIS REFERS TO the report, "England's Edgbaston hangman" (IE, July 7). The emphatic 336-run victory by India over England at Edgbaston marks a defining moment in the journey of Indian Test cricket. As rightly captured in the report, the performance was not just a win but a statement from a young team refusing to be seen merely as a side in transition. The performance of Shubman Gill and Akash Deep stood out not only for their

individual brilliance but also for their composure and maturity under pressure. Akash Deep's ten-wicket match haul was a fast-bowling exhibition worthy of the greats. With Lord's next, Indian fans can dream big again.

Sanjay Chopra, Mohali

### ON THE ROAD

THIS REFERS TO the editorial, "Not even band-aid" (IE, July 5). No policy should be implemented in a manner that it targets the vehicles and the owners instead of air pollution. Rigidity in rules regarding the scrapping of old vehicles only through a limited number of authorised Registered Vehicle Scrapping Facilities (RVSF), along with the tedious process of deregistration will undoubtedly cause further gridlock. The government did the right thing in revoking the policy.

Manish Mishra, Bhopal

### MESSAGE RECEIVED

THIS REFERS TO the article, "Message is also strategy" (IE, July 7). The article is replete with generalised allegations about the failure of "strategic communication" by the Indian government. The author claims that "many around the world have commented, pro-Modi media outlets have done harm for India's image and its vis-a-vis Operation Sindoor". The fact is that the government began daily communication with the nation and world immediately after it launched the operation. It sent teams of MPs to various countries to communicate a stance of zero tolerance against terrorism, too. Consequently, many world leaders have condemned the Pakistan terrorist attack and supported India's right to retaliate, the latest case being declaration by BRICS countries which includes China.

Y G Choudhary, Pune



PAROMITA CHAKRABARTI

AT SOME POINT, in give or take their forties, women are made aware that they are no longer the default setting: Not the protagonists of ads, not the statistical core of a marketing campaign, not, as Gen Z would say, giving main character energy. Instead, they become a certain kind of invisible – their demographic slides quietly off the cultural radar, and the world, with its fresh faces and optimistic filters, keeps spinning.

The obsession with youth is not new. The Greeks built myths around it. The Renaissance painted it in oils. But the modern world industrialised it. Today, youth is no longer measured in years; it is a product category – rebranded, bottled, injected, and sold into an ideal so pervasive that even the act of resisting it must be done with the right serum, the right lighting, the right kind of denial. Anti-ageing is a billion-dollar industry. In 2024, the global anti-ageing market was estimated to be worth \$75.7 billion, according to a survey by market-research firm IMARC. In India, it reached \$2.5 billion and is expected to grow to \$4 billion by 2033. It sells

## When youth is mandatory

The tragic death of Shefali Jariwala and the anti-ageing trap

creams that promise to reverse time, diets that speak in the language of miracles, and procedures that pledge a new you – less tired, less lived-in, necessarily idealised. Even language conspires to soften the blow of ageing, offering euphemisms like "prejuvenation" to fix what isn't broken.

Shefali Jariwala's death at 42 last week from a cardiac arrest – linked allegedly to anti-ageing treatments and an extreme diet – throws this into sharp relief. The actor, who came into the limelight with the remix of the song *Kaanta laga*, was reportedly fasting and on anti-ageing medication; an avid consumer of cosmetic drugs, she is said to have taken a Vitamin C IV drip on that fateful day as well. She was, in essence, a woman trying to stay visible in a culture that fits by once you are considered past the bill of "acceptability".

But what exactly do we mean by youth? Is it the physical resilience – the quick metabolism, the energy that never needs rationing, the sleepless nights that could be followed by 10-hour shifts at the workplace? Or is it something more elusive: A sense of possibility, an

unfamiliarity that has not yet calcified into certainty? Youth, we are told, is when we are most alive. Which implies that ageing, in this cultural grammar, is a kind of dying.

What all of this betrays, of course, is a deep unease with the passage of time itself. We live in a culture allergic to impermanence. Where once age was a milestone – of experience, of wisdom – gleaned over a well-lived life, it is now treated as a letdown. This notion becomes especially cruel in middle age, when adulthood comes of age. The body starts sending quiet memos, the mirror betrays a new flaccidity every time. Youth, in this equation, is no longer merely desirable – it becomes mandatory. So, like Elisabeth Sparkle in *The Substance*, last year's breakout body horror movie featuring Demi Moore, there is a relentless rush to experiment with new treatments to avoid the inevitability of hoariness. Names of substances such as Ozempic and glutathione, retinol and hyaluronic acid roll off the tongue with an ease that should be terrifying but only shows how steeped we are in this configuration of ourselves into a

prospective upgrade.

No one tells you how to age. There's no consensus on how much of a fight you are meant to put up, nor a handbook for how to face the first intimations of mortality. The poet Dylan Thomas told us to "rage, rage against the dying of the light" but he died young, spared the awkward choreography of ageing in public.

To age in the modern world is to perform a paradox. Women are expected to look ageless while pretending it is without effort. They must "own" their years but not wear them too heavily. Ageing "well" is fine as long as it is styled and shape-shifted into wellness routines and aesthetic enhancements, framed as "self-care" over vanity or insecurity.

Jariwala's story is tragic, but not unfamiliar. Many women live some version of it, quietly calibrating their worth against their age. They don't always die from it. They simply lean into an erasure that comes from letting go of the person they were meant to grow into.

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## The Indian EXPRESS

FOUNDED BY  
RAMNATH GOENKA

BECAUSE THE TRUTH INVOLVES US ALL

## WHY BRICS

Questions must be asked about investing political, diplomatic capital in a forum that no longer serves India's interests

THE 2025 BRICS Summit in Rio de Janeiro, Brazil ended over the weekend with a wide-ranging declaration on global and regional issues. But few outside the hapless desk officers in various foreign offices around the world and policy wonks in think tanks would want to pore over the 126-paragraph, 47-page, over-16,000-word declaration. With such familiar phrases as "multipolar world", "Global South", "inclusive", "sustainable" and "global governance", it will certainly impress the enthusiasts who see BRICS as a powerful instrument to upend the global order. Many in the West do fear BRICS for the same reason. There is no reason to believe that US President Donald Trump would have had the time to read the long declaration, but he has repeated his earlier claim that BRICS is "anti-American" and threatened to impose additional tariffs on members of the forum.

But the hopes and fears of BRICS engineering a global transformation are misplaced. For, the forum is riddled with several contradictions of its own and its grasp has always been larger than its reach. As irony would have it, if anyone is trying to build a "post-American order", it is Trump. In less than six months, he has overturned many traditional assumptions about US global policies and is seeking to radically overhaul the international system that Washington built after World War II and that was modified by it at the turn of the 1990s. Consider, for example, the BRICS talk about reforming the Bretton Woods system; Trump is doing precisely that by pressing for change at the World Bank and the International Monetary Fund. The BRICS call to save the World Trade Organisation is a sad (and hypocritical) cry in the wilderness with Trump well on his way to demolishing the rule-maker for world commerce. Even more damaging is that leading members of BRICS have been queuing up in Washington to negotiate bilateral deals with Trump holding a gun to their heads. They are not saving the WTO but protecting their own national trade with America by looking for bilateral deals. China has cut a limited deal. Vietnam, another communist country, announced a trade deal of its own. India hopes that its intensive trade negotiations with Trump's Washington in the past few months will bear fruit this week.

Equally far-fetched is the idea that members of BRICS can submerge their bilateral differences to collectively blunt American dominance. For India, the economic and security challenges presented by China are much bigger than those posed by American hegemony. Two BRICS states — Saudi Arabia and the UAE — are as worried as Israel and the US about the nuclear weapons programme of a third member, Iran. But when is the rub. Trump's actions to overhaul the global economic, financial, and security order have produced great global churn. The Rio declaration has no answers, only hot air, in response to the Trump challenge. The circumstances that persuaded India to found BRICS and promote it for three decades are no longer present. Yet the political groupthink in Delhi is so entrenched that no questions are asked about the virtue of India investing so much political and diplomatic capital in a forum that does little to serve the country's current interests. With India taking over the chair of BRICS, the time to ask those questions is now.

## RAISE THE RED FLAGS

Jane Street episode underlines, yet again, importance of strong surveillance and monitoring systems to protect market integrity

IN RECENT YEARS, alongside the dramatic increase in the number of Indian households entering the stock markets, the derivatives segment has also witnessed a huge spurt in trading. Within derivatives, index options account for a sizeable share of trade. An earlier study by Sebi, the stock market regulator, noted that while 91.1 per cent of individual traders had lost money in the futures and options segment, it was the foreign portfolio investors and proprietary traders who had earned the profits, most of which were made by "algo entities". In April last year, reports mentioned a legal dispute involving the US-based Jane Street Group, which belongs to the algorithmic trading community, "for alleged unauthorised use of their proprietary trading strategies in India". Sebi followed up these reports with a preliminary inquiry to determine if there was any market abuse. Following its investigation, on July 3, the stock market regulator banned the Jane Street Group for manipulative trading practices and ordered the impounding of its unlawful gains, which it estimated at Rs 4,843 crore.

In its interim order, the stock market regulator has detailed the modus operandi of the Group, the strategies it drew on in its trading. It notes that the Group operated an "intra day index manipulation pattern". This involves dealing in segments across equities, futures and options simultaneously. The interim order notes that the "intensity and sheer scale of their intervention" and the "reversal of these large and aggressive trading," was "without any economic rationale, other than the concurrent activity in and impact on their positions in the Bank Nifty index options markets". The Group also engaged in an extended "marking the close" strategy, an approach where large buy or sell orders are placed in "the final moments of a trading session, with the specific intent of influencing the closing price of a security or index to its advantage". As per the order, on at least 21 days, the Group has "prima facie engaged in illegal manipulation". In February, the National Stock Exchange cautioned the Group, saying that it had been "consistently engaging in trading patterns that raised serious concerns over market integrity". Sebi notes that the Group ignored the "regulatory red flags", and continued with its strategies.

At a time when millions are entering the stock markets, the regulator must ensure that the integrity of markets is maintained. That its surveillance and monitoring systems are able to effectively track transactions at all levels and raise red flags. Regulatory action must be swiftly taken to protect the sanctity of markets.

## THE BILLIONAIRE EX

Revenge dresses and bright red sports cars are for others. Elon Musk's glow-up involves a brand new political party

AFTER THE BREAKUP comes the glow-up. Two people have a falling-out, harsh words are exchanged, and at least one of the parties sets out to show that they can do better. In the case of two rich and powerful men duking it out in public, following one of the most predictable separations in recent history — the White House can simultaneously accommodate only so many egos above a certain size, after all — the stakes are that much bigger. The others can keep their post-breakup revenge dresses and bright red sports cars: Bolstered by the response to a Fourth of July poll on his social media platform X, Elon Musk has minted himself a whole new political party as a challenge to former BFF Donald Trump and his Republican Party.

Musk has a history of using polls on X to make major decisions, whether it was buying Twitter or reinstating Trump's account on the platform. Politics, however, requires more than just an online constituency of bots and fans. But there is another reason Musk's chosen form of payback is surprising. Just before relinquishing his position as head of the Department of Government Efficiency, the billionaire had been candid in his appraisal of politics in Washington, DC, describing it as a "pair" in interviews. That his companies, especially Tesla, apparently paid the price for his political preoccupations didn't help either.

Already, the announcement of Musk's new America Party has seen Tesla stocks tumble, threatening to wipe nearly \$70 billion off the firm's value. As he resumes his hostile exchanges with the US President — who has dismissed the formation of the new party as "ridiculous" — Musk's decision seems less a well-considered attempt to disrupt politics as usual, and more the kind of angry riposte more frequently seen on a social playground.



PRATAP BHANU MEHTA

THE ELECTION COMMISSION'S Special Intensive Revision (SIR) of electoral rolls in Bihar is becoming a travesty. It is hard to disagree with the formal objective of the exercise: No eligible voter should be excluded, and no ineligible person should be included. But this reasonable aim is being transformed into a bureaucratic dystopia that threatens the rights of ordinary voters.

The last intensive revision of electoral rolls was carried out in 2003. Now, the Commission announces a special revision just weeks before an election — on the heels of a special summary revision that involved extensive surveys barely six months ago, with an updated list published as recently as January. Yet voters are now required to furnish documentary proof of citizenship from a list of 11 prescribed documents — most of which they are unlikely to possess. This demand is unprecedented in the history of electoral roll creation.

The new documentation requirements are not just onerous, they are bewilderingly complex. Those whose names appeared in the 2003 rolls may furnish an extract as proof. But others face steeper hurdles. Those born before 1987 must provide a document with place and date of birth. Those born between 1987 and 2004 must produce a document with their parents' date of birth and one of 11 documents proving their own place and date of birth. Those born after 2004 must go further, furnishing proof of both parents' date and place of birth in addition to their own. This process places an extraordinary burden on the citizen and risks mass disenfranchisement.

The logic of the order is perverse: Every principle turns into its opposite. The Commission boasts of giving voters a choice among 11 documents — what liberty! But this liberty is hollow. The Commission refuses to recognise the documents most citizens actually have — like Aadhaar or MGN-REGA cards — while demanding documents that are beyond the reach of most. Even conservative estimates suggest that lakhs of voters could be excluded. Almost all the petitions against the order provide data on the minuscule number of citizens who possess all the relevant documents. And the arbitrariness is striking: Why should a family register

EC exercise in Bihar shows bureaucratic insensitivity and state overreach, will erode trust in institutions

We need not speculate about the Commission's motives; they may well be honourable. Nor do we need to predict the political fallout of this move — it is often unpredictable. What matters is the potential effect: This exercise reveals the state's presumptuous character. It burdens citizens with the constant demand to prove their identity, as if they are forever on probation. The KYC (know your customer) mania has extended to voting. Proof must be furnished again and again, often under arbitrary or shifting standards.

carry more weight as proof of citizenship than, say, other excluded cards?

Dissect the list of the 11 acceptable documents, and its social bias becomes evident. Most relate to education, government employment, or property rights — echoes of an era when suffrage was tied to privilege. This is not a direct return to educational or property-based qualifications, but the privileges conferred on the educated and propertied are stark. It is almost a throwback to the 19th century, when the privileges of the educated and propertied were taken for granted.

In principle, the Election Commission allows for safeguards: Electoral registration officers (EROs) must conduct inquiries and provide a fair hearing before deletion. But these procedural protections, in context, can invert their meaning. They expose vulnerable citizens to local officials' discretion, particularly in a state like Bihar where administrative capacity is uneven. The time frame is implausibly short, and it is unrealistic to expect lakhs of inquiries to be conducted fairly and consistently. Even worse is the looming threat that the citizens flagged in this process could be referred to a Forensic Tribunal. Is the appeals process a remedy — or merely another way to ensnare citizens in an opaque and hostile system?

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This formalism — articulating reasonable objectives while ignoring practical realities — inflicts real harm. It ignores the ground realities of documentation in India, particularly in poorer states, it overlooks how documentation requirements impose disproportionate burdens on the marginalised.

The order also disrupts lives with its unreasonable timelines. On various estimates, about a tenth of the population of Bihar migrates out for work; floods severely affect

families during this time of year. Even in the best of times, the state does not have the capacity to conduct these kinds of exercises in short order. This order replicates the disruptive logic of demonetisation, where the state asserts its power by inducing mass anxiety. Even if one accepts that an intensive revision is necessary, it cannot inspire public trust if announced suddenly, weeks before an election. If the Commission truly believes these exercises are essential, it should have evolved consistent and reasonable norms regarding format, documentation, and timing in consultation with political parties.

Our bureaucracy has long had a penchant for placing citizens at the mercy of petty officials. It remains deaf to the claims raised by social movements around enfranchisement. To put it bluntly, this exercise appears to be a pilot for a backdoor NRC, introducing new and discriminatory documentation standards. This is not just about Bihar. Even if one believes an NRC is necessary, it must be carried out fairly, without fear, and only when the state has built the infrastructure and political conditions to support it. This has not happened. Instead, the burden of state failure is being shifted onto citizens. The state demands documentation it neither trusts nor has enabled people to obtain.

We should be cautious in impugning constitutional authorities — their credibility is a precious resource. The courts also should not tread on other constitutional authorities lightly. But voting is so fundamental to our identity as citizens, and so constitutive of the republic, that the courts need to do the minimum necessary to ensure that such exercises are not just formally fair, but also fair in substance. But this initiative by the EC is ill-judged and ill-timed. It should be deferred until it can be executed credibly, with transparency, and without placing an undue burden on genuine citizens.

The EC's order is, at the very least, an exercise in bureaucratic insensitivity and state overreach, and will erode trust in institutions. The task of the state is not to manufacture new sources of fear — it is to relieve citizens of their anxieties.

The writer is contributing editor, The Indian Express



ROHAN MANOJ

FIFTEEN YEARS AGO, White people walked into a shared kitchen in our university halls in the UK and were treated to the sight of me eating rice with my hands. "You could use a fork, you know," suggested one. I could — but why should I? "This is how we eat," I shrugged, and that was that. The memory floated unbidden to the surface as I read about Zohran Mamdani, the Democratic nominee for mayor of New York City, being pilloried for eating biryani with his hands.

On one level, beyond the obvious racism, it's an integration-versus-multiculturalism question: The virtues of the former are often trumpeted over those of the latter in debates about immigration, but how far can you go before it becomes an act of surrender, of passing every little facet of your culture and identity through a filter to ensure the White man's comfort? The niceties of knives and forks are among the many spoken and unspoken social shibboleths; they span social etiquette, accent, dress, what cricket team you support — a test of loyalty proposed by one of Margaret Thatcher's lieutenants — and more.

Multiculturalism, which Mamdani exemplifies so well, allows for more give-and-take, a broadening of horizons, and yes, a little more discomfort for everyone — at least in the short run — if done right. If done wrong, it poses a greater challenge to the host polity

## BROWN MAN'S BURDEN

Attacks like those on Zohran Mamdani can pierce immigrants' bubble of belonging

Multiculturalism allows for more give-and-take, a broadening of horizons and a little more discomfort for everyone — at least in the short run — if done right. If done wrong, it poses a greater challenge to the host polity and society, as opposed to the individual.

and society, as opposed to the individual: A lack of mutual understanding, conflicting values, and in the worst instances, total ghettoisation, systemic deprivation and resentment boiling over. The trick may be to find a golden mean, the right balance of integrating migrants into the host society and respecting their cultures. It is an elusive, subjective and perhaps quixotic idea, as the rivens societies of the West and the onward march of ethno-nationalist politics attest to.

For individuals, one challenge — not the greatest, but quite a wearisome one nonetheless — is to fend off alienation by a thousand sneers. In Mamdani's case, there's open hatred and bigotry on display from predictable quarters. But such things can also sometimes transcend the conscious politics of the people involved; there's something visceral in the discomfort, an ingrained feeling of disgust. "You smell (or your house smells) of curry" is another one of those things you encounter unlooked for: It can come out of nowhere and from people you wouldn't expect it from, given their views — they might explain it as having something to do with ventilation, just as you might find "mainland" Indians of any political flavour who aren't exactly comfortable with the aromas and flavours of Northeastern cuisines; perhaps their noses truly can't help it, but expressing it insensitively is a sure way of causing hurt.

Pinspricks like these can burst the bubble of belonging and security, the sense of having integrated and become a productive and patriotic member of your new society, even identifying proudly with its past. Both the conscious and the unconscious bigots remind you it's an illusion that can be shattered at any time. The resulting insecurity breeds a certain wariness, especially when you're the only Brown or Black person in the vicinity: even when there's no immediate unpleasantness, sometimes you can't help but wonder — what are they really thinking? It's why the film *Get Out* (2017) resonated so strongly with me, although it's about African Americans in the US rather than immigrants: A horror story in which the Black protagonist meets, and is effusively welcomed by his girlfriend's family and other White people who hide a terrible secret.

In the face of this ebbing and flowing tide of hostility, it can help to have something to anchor us in the host society: Support, friendship, relationships. In other words, people whose empathy can shatter the barriers built by parochial minds, who can affirm to us that we are who we think and hope we are. Mamdani certainly seems to have no shortage of those. Many many others, too, find their people and thrive.

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## JULY 8, 1985, FORTY YEARS AGO

## PUNJAB SOLUTION

FAVOURING CONSENSUS ON all domestic and international problems, Prime Minister Rajiv Gandhi rated the chances of normalcy returning to Punjab and finding a solution within the framework of the Constitution as "high" though President's Rule might have to be extended if holding elections before October 6 is not feasible. He also hoped to begin talks soon with the leaders of the Opposition parties on both the Punjab and reservation issues.

## BLACK BOX SEARCH

BOTH THE BLACK boxes of the Air India jumbo which crashed on June 23, have now been lo-

located. The operation continued in the Atlantic Ocean off Ireland to salvage the instruments which may provide clues to the cause of the accident in which 329 people died. Reporting substantial progress in the operation, an official source said the area of sea being scanned for the flight data recorder and the voice recorder by a remote controlled submarine has been reduced to about 200 square metres.

## THIMPHU TALKS

WITH THE DEPARTURE of representatives of Bhutan militant groups and the Tamil United Liberation Front (TULF) leaders for Thimphu, the stage is now set for talks to begin on the ethnic crisis in Sri Lanka, the first

such exercise between the militant groups and the government. Ten representatives from the militant organisations and three from the TULF flew from New Delhi to the capital of the Himalayan kingdom.

## BHINDRANWALE'S GHOST

THE GHOST of the militant Sikh leader, Jarnail Singh Bhindranwale, has virtually been laid to rest in this border district of Ferozepur, which provided him his name — Bhindranwale. A majority of people in Bhindranwale's erstwhile area of influence — a 60-km belt north-east of Ferozepur — are today reluctant to talk about him. For them, he is a gladly forgotten aberration.





[ OUR TAKE ]

## A voice of the Global South

Brics summit underlines India's consistent call for reforming institutions of global governance

The Brics leaders' declaration at the summit in Rio de Janeiro has highlighted risks posed to global trade by indiscriminate hikes in tariffs. It has also called for urgent reforms to institutions of global governance such as the UN Security Council and the World Bank, reflecting the most pressing concerns of nations in the Global South. Prime Minister Narendra Modi said the Global South had become a "victim of double standards" because of the failure to revamp these institutions and to address the concerns of developing countries related to climate transition and access to technology.

While the leaders' declaration did not name any particular country, it was obvious the document was referring to the whimsical trade policies of the Trump administration in the US when it spoke of serious concerns about unilateral tariffs that distort trade and are neither transparent nor equitable. Interestingly, the US President took to social media to warn of an extra tariff against countries allying with Brics and engaging in "anti-American policies". But more than tariffs, the Rio declaration had some of the strongest language ever used in a Brics joint statement to call for the comprehensive revamp of the UNSC so that it can respond to global challenges and support the aspirations of Global South countries to have a greater role in international affairs. Modi too emphasised that global institutions, in their current form, have given the Global South the short shrift in decision-making and have no solutions to conflicts and economic crises.

The declaration reflects the ongoing global churn, a trend exacerbated by the US reducing its role on the international stage and alienating both friends and foes with its inconsistent policies. Herein lies a role for the Brics — to reshape itself as a counterweight to nations of the Global North and hold them accountable for their actions. The references to the situation in Gaza and the condemnation of the military strikes against Iran in the leaders' declaration point towards that. Whether the Brics member states can consistently speak in a single voice remains to be seen, but the summit in Rio was a clear indication that power equations are being reset amid the global churn. This process, hopefully, could lead to a more evenly balanced global order. In this context, India's stance offers a path forward at a time when China clearly wishes to be seen as part of the Global North, and its approach towards poor countries is rapidly beginning to resemble that of the West.

## When Elon Musk seeks political entry

The big, beautiful partnership between Donald Trump and Elon Musk has been unravelling at great speed. The rupture in ties between the US president and the world's richest man led to the latter announcing Sunday a new political party — America Party — to give back Americans their freedom. America needs more choices than the present two parties, Musk seems to believe. Good luck to him.

Musk bet big on Trump and MAGA (Make America Great Again) platform. Post-election, he led Trump's cost-cutting initiative under the department of government efficiency (DOGE). He was out of DOGE soon, and the final parting came over President Trump's One Big Beautiful Bill that seeks to rework government finances. The two men also had multiple unpleasant exchanges on social media. Trump's take on Musk's party was that he has gone completely "off the rails" to "essentially become a TRAIN WRECK".

Trump 2.0 has shaken up the foundations of the bipartisan political consensus in the US and opened up the space for disruptors. That Zohran Mamdani, a self-declared democratic socialist, won the Democratic ticket to contest the New York mayoral election suggests a restive political constituency unhappy with the political status quo. But Mamdani, while endorsing radical agendas and a welfareist civil vision, chose to launch his politics from an established platform. He may have taken the cue from Trump, who captured the Republican platform to launch his MAGA agenda. But Musk is offering a third way, on a "freedom" platform, in anticipation of backing from a small-government-pro-business constituency dissatisfied with Trump's economic vision. Politics is a complicated business that calls for constant negotiation with stakeholders, and ethical guardrails to ensure balance among politics, government, and business. In Musk's world, there are no red lines or conflicts of interest. Who is to walk into that world of "freedom" remains to be seen. After all, the two-party system in the US contains multitudes.

## Building for future, a new sporting culture

The new National Sports Policy is an inspiring way of looking at what Indian sport can do

Sports journalists aware of the reality of Indian sport usually have two responses to its policy documents — either a sigh or a snicker. But, given the National Sports Policy (NSP) 2025 also Khelo Bharat Niti 2025 has arrived almost a quarter of a century after its last version — during which our elite sport has transformed itself — NSP 2025 must be understood in its context as well as essence: what it is and what it is not.

The NSP is not an action plan; rather, it is a framework of guiding principles, a mission statement meant to give direction to our sporting stakeholders to devise and execute programmes. It has evolved significantly from its 2001 avatar. Its fundamental breakthrough is the broad-basing of the very identity of our sport. NSP 2001 treated sport as an elite pursuit around elite excellence and, from there, medal-success in the world.

In NSP 2025, sport in India is to be accessed, treated and spread through multiple forms, of which elite excellence is only a small part. The policy integrates sport to public health and education. Through access, especially to the marginalised, it plays a part in community, business and scientific advancement. NSP 2025 directs sport

in the service of a larger population than targets earlier — the elite and the everyday, people of multiple abilities and identities.

From some perspectives, NSP 2025 is an inspiring way of looking at what Indian sport, if put to its best use, can do — beyond medals and that fickle entity called national pride or national self-esteem. (Frankly, in India, there are many things to be embarrassed about other than medal tallies.)

But take the glass half-empty view and NSP 2025 reveals the pocket-sized Indian sport. Its 15 key objectives are a mirror to our inefficiencies and inequities. The mention of providing an "athlete-centric support system" is quite telling of the existing system. The objective to "organise sports competitions at various levels, creating a robust competitive structure" highlights the lack of this currently.

The sport-as-status symbol excuse is used to bypass governance accountability. That the NSP's key focus area advocates "strengthening sporting culture and ecosystem from the block level to the national level" is proof that India's sporting pyramid at state level itself is built on shifting sand. The nexus between sports officialdom and heavy-handed political interference at every level remains a never-ending nightmare.

Among the key NSP objectives, no. 8 (strengthen governance and institutional frameworks in the sports sector)

deserves a higher spot on the list, albeit "robust talent identification and development systems" and "sports science and innovation". But this complaint seems churlish because NSP 2025's strategic framework puts "strong professional sports governance, implementation and monitoring" right at the top. States have been asked to modify their existing sports policies "if any", or use NSP 2025 as the benchmark for their future plans. Better known than the NSP, but still in a somewhat amorphous state, is the National Sports Governance Bill 2024.

In its draft phase, the bill sought to overhaul sports governance structures and set up an independent regulatory body and tribunal. Naturally, its promised public appearances keep getting delayed. Whether it will be sighted in the next Parliament session is unclear.

At the same time as the NSP was released, a key meeting between an Indian delegation and the International Olympic Committee (IOC), around India's bid to host a future Olympics, took place. The 16-member Indian delegation comprised Indian Olympic Association (IOA) president PT Usha, its chief executive officer Raghuram Iyer, Gujarat sports minister Harsh Sangavi, sports secretary, government of India, two Gujarat government principal secretaries (one of whom was also the Ahmedabad municipal commissioner), consultants from EY India and



Sharada Ugra



Under NSP 2025, sport in India is to be accessed, treated and spread through multiple forms, of which elite excellence is only a small part.

Burton Sports, one consular staff from the Indian embassy in Switzerland, a president from the chairman's office, Reliance India Limited, and a businessman some in the delegation did not know much about. This group of 14 men, two women and zero contemporary Indian sportspeople met the IOC's Future Host Commission. Here, for the first time, the IOC and the Indian public was officially informed of the name of our prime Olympic host city candidate: Ahmedabad/Ahmedabad.

It is an unusual choice, and not just because there was no public discussion around the choice of the best Indian city to host an Olympics, nevermind the question of whether India needs to stage the Games. There has been no tradition of Ahmedabad either staging international or even major national sporting events, other than say in the last five years. Nor does the state of Gujarat, unlike Haryana or Manipal, send a sizeable number of athletes to any level of global mega events, continental championships or other multinational events. In the last two National Games, Gujarat finished 17th and 16th in the medals tally. In order to beef up its global host portfolio,

Ahmedabad will stage the 2029 World Police and Fire Games.

This seems counter to the NSP 2025, which offers a sports status framework to create pathways to build sporting ecosystems from the block level upwards, rather than aim for top-down osmosis.

India's Olympic ambitions, whatever the host city, must contain the humility to accept that our records in governance and doping are particularly abysmal. Until very recently, the IOA's executive board was at war with its president over the appointment of its CEO. The IOC is well aware of this, as it will also be of the recent World Anti Doping Agency (WADA) study that pegged India's positivity rate as highest among nations that analysed more than 5,000 samples. Let's look at NSP 2025 as more than a response to our sporting truths and greed for stadium construction/evangelism. It offers India a forward-looking, inclusive vision that uses sport to reach more people and reap benefits that can be replicated across generations.

Sharada Ugra writes on sports. The views expressed are personal.

## Why India must cut its auto sector tariffs

India and the US have resumed trade talks with the July 9 deadline on tariffs looming. Without tariff reductions by India, the US will impose additional duties (26%) on all Indian exports. One central issue remains India's triple-digit automobile tariffs, which face a 25% retaliatory duty if unchanged.

India must reduce auto tariffs. The prize isn't just avoiding Trump's retaliation. It is ending over 70 years of protectionism that has entrenched India's automobile sector in mediocrity. India's automobile tariffs are global outliers. Cars priced below \$40,000 face effective tariffs of 70%. Above that price tag, effective tariff rates jump to 100%. Used cars hit at hardest at 137.5%. In contrast, China levies 15% on automobile imports, with higher rates on US cars. The European Union applies a uniform 10% on all non-EU car imports. South Korea charges 8% on cars. Japan imposes no tariffs.

Since 1948, India has historically protected out foreign manufacturers in favour of the domestic auto sector. The rationale was to protect the infant auto industry by outright banning imports of fully-built cars. Only companies committed to local manufacturing were allowed to operate after 1953.

Liberalisation since the 1990s ended licensing requirements. Tariff rates fell from 65% in 1992 to about 35% by 2000. This liberalisation in the auto sector was short-lived. By 2014, tariffs had climbed back into triple digits, peaking at 125%.

India ranked third in car production in 2024, but only exported 14% of its total output. Homegrown manufacturers, Tata Motors and Mahindra, control the sector and only 2% to exports. In contrast, Japan exported nearly half its production. Spain, Germany, and South Korea, despite producing fewer vehicles than India, exported 89%, 77%, and 67% of their output, respectively. As centuries of trade theory predict, protectionism meant to nurture export giants ended up creating an octogenarian infant.

Instead of fostering innovation and competitiveness, India's protectionism combined with relaxation of foreign investment limits has encouraged foreign automakers to manufacture for its captive market. By 2024, seven-in-ten passenger cars sold domestically were from foreign-controlled companies such as Maruti Suzuki, Hyundai, Toyota and Kia. Maruti Suzuki alone accounted for 41% of domestic sales. Protectionism has also shaped vehicle quality. To meet local price pressures, foreign-controlled brands sold older or stripped-down models. Hyundai's Indian line-up lags its global fleet by a generation. Between 2014 and 2016, popular Indian models received a zero-star safety rating in international crash tests, missing basic features like airbags. Dual airbags became mandatory in India only in 2022.

In the emerging global trade order, high tariffs on foreign cars undermine India's export successes in auto parts. India's auto components sector — engine parts, transmission systems, electrical components, and chassis parts — remains competitive. On components, India imposes a 10-15% tariff. In FY24, Indian companies exported nearly \$6.79 billion worth of auto components to the US, its largest market. India's finished car exports to the US totalled only \$8.9 million in the same period. Before the recent escalation, the US imposed standard most favoured nation (MFN) rates of 2.5% on

passenger cars and auto parts, and 25% on light trucks.

In April-May 2025, the US imposed retaliatory tariffs of 25% on both automobiles and auto components from India. The global competitive components sector, often supplied by MSMEs, will pay the price for protecting large and uncompetitive domestic car manufacturers.

The real obstacle to reform lies not in Washington, but India's domestic auto lobby, which has perfected a system of resisting liberalisation. Lobbying has layered tariffs with surcharges and shifting exemptions that leave effective rates unchanged despite nominal tariff cuts.

The FY24 budget used as a pretext for this obstruction. The government slashed the basic customs duty on cars priced over \$40,000 from 100% to 70%, and eliminated the 10% social welfare surcharge. However, it simultaneously introduced a 40% agriculture infrastructure and development cess applicable solely to imported vehicles, leaving the effective rate unchanged at 110%. Even government documents described this as a "decrease in tariff rate with no change in effective rate".

Tariffs on used cars seem to follow the same formula. The basic duty dropped from 125% to 70%, and the 12.5% surcharge vanished, but a 67.5% cess cancelled the cut. Commercial vehicles, with an overlapping cess of 20%, saw no effective reduction. Only motorcycle tariffs were cut. Completely built-up large-capacity models — think Harley Davidsons — dropped from 50% to 30%. None of this is new. In 2012, the Society of Indian Automobile Manufacturers warned that any cut in duties "has to be avoided at all cost" because reducing tariffs would risk domestic investment, manufacturing, and jobs. This stance aligned perfectly with that of the Make in India call — by raising tariffs and choosing national champions.

But protectionism is complex. During UK-India trade talks, Tata Motors, India's auto lobby titan, stood to gain from lowering British car tariffs to 10% through its Jaguar Land Rover (JLR) subsidiary. JLR now faces its own challenge as 23% of its sales come from India, where new 25% tariffs on UK automobiles threaten profitability. On electric vehicles (EVs), Tata Motors dominates India's EV segment but continues arguing against easing the 100% tariff on imported EVs until 2028.

Tesla's blocked entry demonstrates how firmly this line has held. Since 2021, Tesla CEO Elon Musk has requested a 40% tariff rate for imported EVs. Domestic automakers opposed any reduction unless Tesla committed to local manufacturing. That proved difficult in India's regulatory labyrinth. General Motors exited after accumulating over \$1 billion in losses. Ford followed in 2022 after \$2 billion in losses and 4,000 job cuts. As talks head to Washington, the real question isn't India's national interest versus Trump's demands. It is whether India will finally choose consumers and small manufacturers over an auto lobby that masks its lack of competitiveness with patriotism.

Sharada Ugra is a research scholar and Sharada Rajagopalan is a senior research fellow with the Mercatus Center at George Mason University. The views expressed are personal.

CHARLES III | BRITISH MONARCH

Let us ... reaffirm our commitment to building a society where people of all faiths and backgrounds can live together with mutual respect

On the 20th anniversary of the 2005 London bombings

## Innovation needs State as much as the private sector

From Moon landings to mRNA vaccines, many breakthroughs were seeded by governments willing to do what markets could not. Yet today, the State is often said to step aside and let the private sector lead. This creates a paradox. Governments are blamed for not innovating, yet also told not to try. At the same time, many private firms have shifted from building to optimising. Instead of investing in research or transformational ideas, they focus on quarterly targets and stock buybacks. Innovation has become a buzzword rather than a behaviour.

True innovation ecosystems need both sides. They emerge when governments stop acting like cautious regulators and become mission-driven investors. They grow when businesses take risks and focus on long-term value. The world's most iconic innovations are rarely the work of lone entrepreneurs. They are the outcome of public ambition meeting private execution. Apple's success owes much to State-led innovation. Technologies like GPS, touchscreens, and the internet began with DARPA funding when private investors stayed away. Finland followed a similar approach. SITRA, its public funding agency, retained equity in early investments in Nokia.

In the 1960s, South Korea picked automobiles, where it had no advantage, and used State support and learning-by-doing to turn Hyundai into a global brand. China, seen as it could not win with combustion engines, bet early on EVs. It backed firms, secured minerals, and shaped demand through procurement. Today, it makes 60% of the world's EVs.

India must remember these lessons as it builds its own innovation engine. The government has made moves through Production Linked Incentives (PLI) schemes, digital public infrastructure, and missions in quantum and semiconductors. But many efforts stop at subsidies or tax breaks. What is missing is the confidence to lead. Mission-driven innovation needs the State to go beyond funding and shape markets with clear goals, coordinated capital, and long-term commitment. This means supporting grand challenges with patient capital and strong institutions. It also means reforming procurement to reward risk, building public R&D that works with industry, and turning innovation into a national drive.

The real risk is doing too little. India has the talent and ambition. But without a State that acts like a venture capitalist with a public purpose, we will keep mistaking input for innovation and miss the chance for global leadership. For this engine to truly fire, the private sector

cannot be a passenger. It must become a co-pilot. The private sector's role in scaling and commercialising innovation is essential. Amazon reshaped logistics. Moderna turned public mRNA research into a vaccine within months. In South Korea, State support helped Samsung and LG shift from copying to creating.

India's private sector is still catching up. Some firms are global leaders in services and frugal engineering, but the overall picture is sobering. Private R&D spending is just 0.3% of GDP. China spends 5X more, and countries like South Korea and Germany invest even more.

Outside a few examples like Tata Motors with the Nano, Serum Institute's vaccines, or Biocon's biosimilars, underinvestment in research, but innovation needs patience, close ties with universities, and the courage to accept failure. What can change this? First, shift from imitation to invention. Being cost-effective is not enough without unique intellectual property. Second, focus on India-specific problems like rural fintech, climate-resilient crops, and energy-efficient manufacturing. Third, build strong partnerships with public institutions to shape future markets, not just for CSR.

Innovation is a business model. The sooner we realise that, the faster we can move the value chain. If we want innovation-led growth that is smart and inclusive, we must stop treating the State as a passive regulator and the private sector as the only entrepreneur. The real economy is not a casino where public institutions absorb losses and private actors pocket gains. A truly entrepreneurial State does not just fund risk, it demands a fair share of reward. A responsible private sector does not just seek tax breaks and regulatory holidays, it invests in long-term capacity that creates public value. What we need is a new risk-reward compact, as Mariana Mazzucato calls it. One that acknowledges the collective effort behind innovation and ensures benefits are more broadly shared. This is not about capping profits. It is about recognising that the innovation team sport and designing systems that reward the team, not just the star striker. Breakthroughs co-created, not the unicorn court, will define India as an innovation power house.

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## Making Brics count

Summit highlighted diminishing relevance

The joint statement issued by the Brics summit, hosted by Brazil, may have attracted the ire of United States (US) President Donald Trump for its criticism of the bombing of Iran and tariff-based protectionism. But this unexpected attention from an erratic US President does not detract from doubts about the grouping's relevance. The catchy acronym Brics was coined by a Goldman Sachs economist in 2001 to designate a group of prominent emerging markets in Brazil, Russia, India, and China. This grouping first met in a formal summit in 2009; South Africa's attendance at the second summit in 2010 rounded off the acronym to Brics. Since then, the group has evolved into a 11-country club with Egypt, Ethiopia, Indonesia, Iran, Saudi Arabia, and the United Arab Emirates admitted as full-member countries. It also has "partner countries", a category created last year, having Belarus, Cuba, Vietnam, Kazakhstan, Thailand, and Uganda. As a grouping of the Global South that complements the G20, Brics is said to represent almost half the world's population, more than a third of global land area and over a quarter of global economic output. Yet, the question lingers: Is it cohesive or powerful enough to credibly represent the interests of the Global South against Western dominance?

For one, unlike the powerful G7 bloc, which comprises largely homogeneous polities in terms of their economies and political outlook, members of Brics are at widely differing stages of economic development and have divergent political ideologies and geopolitical priorities. Nothing signalled the diminishing importance of the grouping as a credible multilateral counter to Western hegemony more than the absence of the leader of the grouping's largest and most consequential economy, China's Xi Jinping (Premier Li Qiang attended in his place). Vladimir Putin's inability to attend owing to an arrest warrant by the International Criminal Court (ICC) for his role in the 2022 invasion of Ukraine (he attended via a videoconference link) is another signal of diverging interests.

It is worth noting that just last year Mr Putin received a red-carpet welcome from ICC member-country Mongolia, which is heavily dependent on Russia and China for its energy security, to much Western condemnation but little lasting consequence. The lengthy, nearly 16,000-word Rio de Janeiro Declaration, which followed the summit, made all the right noises about "inclusive and sustainable" governance. The statement included all the politically correct terminology about "promoting a more just, equitable, agile, effective, efficient, responsive, representative, legitimate, democratic and accountable international and multilateral system in the spirit of extensive consultation, joint contribution and shared benefits". The usual mélange of digital cooperation, reforming multilateral institutions such as the United Nations, the World Bank, and the International Monetary Fund and so on, global health policies, open trading systems, artificial intelligence, and climate change found due mention. The statement also strongly condemned the Pahalgaon terrorist attack.

However, the statement masks differences among members. For instance, although the grouping condemned the military strikes against Iran and described it as a violation of international law and the charter of the United Nations, some members called for a stronger statement on Israel's war on Gaza and its attacks on Iran. The statement did not name the US either in its criticism of attacks on Iran or in its statement about the tariff wars and protectionism. India hosts the next Brics summit in 2026. Sustaining and increasing its relevance will be New Delhi's major challenge.

## Presidential promises

Donald Trump implements his Budget agenda swiftly

The United States (US) Congress stayed up late last Thursday passing President Donald Trump's signature new legislation, the "Big Beautiful Bill", and on Friday Mr Trump signed it into law. The new Bill reworks taxes and expenditure and restructures the multi-trillion-dollar US federal Budget. While some of its implications are relatively minor implementations of Mr Trump's campaign promises — for example, it cancels taxes on tips — some are far more wide-ranging. Most importantly, however, it continues the tax cuts that Mr Trump had put in place in his first term as President. The \$4.5 trillion tax-cut giveaway over 10 years has partly been paid for by a reduction in the amount allotted to subsidised health care for the poorest Americans, which will now be allocated by a work requirement. Subsidies for renewable power and electric vehicles will also be cut, which has drawn the ire of Mr Trump's erstwhile ally, Tesla Chief Executive Officer Elon Musk.

Mr Musk, and other critics of the Budget Bill, are concerned in particular about the risk of rising debt levels in the US. Mr Trump's package will raise the deficit by \$3.4 trillion over the next decade, according to the nonpartisan Congressional Budget Office (CBO). This means it is one of the most expensive single Bills in decades. The CBO further projects that, by 2050, the US debt-to-gross domestic product ratio will be 145 per cent. But this assumes a contraction in spending over this period. The US Treasury, which does not assume any such contraction, expects that debt will reach 200 per cent of gross domestic product by the middle of the century. The Yale Budget Lab splits the difference, saying that it will be 183 per cent, as distinct from 142 per cent in a business-as-usual scenario. The additional debt will not be rendered insignificant by enhanced growth, in other words — the CBO expects that only 4 basic points of additional growth a year will be earned by this Bill.

It is necessary, first, to acknowledge Mr Trump's achievement. He has managed to get the fractious Republican Party, which includes a sizeable contingent of fiscal conservatives that have long revolted at higher deficits, to sign on to his Bill. This level of party management contrasts with the chaos in Congress that marked his Democratic predecessor's term, as well as parts of Mr Trump's first term. In general, the President's first six months have been among the most impactful in the modern era. He has moved swiftly forward on his agenda, and successfully managed the other branches of government. Neither Congress nor the Supreme Court has been able to intervene in any substantive manner. His entire administration and the White House have been unified in pushing through his agenda — again, a very different experience from his first term. That said, the markets are rightly concerned about what this will do to long-term Treasury yields, which will spike upwards. In the past, higher spending and yields in the US have been associated with capital outflows from the emerging world, including India. That might be a problem. But it is even worse, in fact, if money does not flow to the US. It means that confidence in the world's anchor economy might finally be eroding — which could have even more dangerous implications for global stability.



ILLUSTRATION: BINAY SINHA

## The ideological abyss

To rescue or not to rescue Vodafone goes beyond one's views on privatisation or nationalisation — it depends on what will work in a given context

This column is called "Beyond Ideology" for a reason. When polities, economies and societies have become more and more complex and diverse in nature, using ideological lenses to make policy has limited utility. Today, no country can be called capitalist or communist as these terms were originally defined. They are all hybrids. When technology companies wield so much power and know so much about us, should we just call them private companies providing a service or private-public entities with state-like characteristics? Normally, it is the job of the state to regulate economic and social activities; but we expect social media to do some of the regulatory jobs that states usually do.

In this article, one does not propose to examine all these issues, but to focus specifically on one question: When is it okay to privatise an entity, and when does the opposite serve public interest better? We shall do it using two examples: Vodafone and Airtel in India. Both were (and probably still are) basket cases, needing sector- and case-specific solutions that go beyond ideology. We have to focus on what works.

The Narendra Modi government appears to have tied itself in knots over Vodafone India. The company is sinking, but the government is unsure how to handle its request for a bailout. Telecom Minister Jyotiraditya Scindia said in an interview with *CNN-IBN* that he cannot offer the company's massive dues for conversion into equity. Since the government already holds a 49 per cent stake, converting more dues would make Vodafone a public sector unit.

On the other hand, Airtel — despite being more solvent — has muddied the waters by seeking a similar conversion of a part of its dues into equity. This makes any Vodafone-specific bailout harder to justify.

Banks, meanwhile, are balking at the idea of lending more to Vodafone, especially when Mahanagar Telephone Nigam Ltd (MTNL) has technically gone into default. MTNL is a quasi-sovereign borrower, which owes more than ₹8,000 crore to lenders, and some banks have marked the loans as non-performing.

The government has a few options on Vodafone. One is to allow it to go bust and let the banks pick up the pieces in bankruptcy court — leaving behind a duopoly of Airtel and Jio, with the still-struggling Bharti Airtel Sanchar Nigam Ltd (BSNL) bringing up the rear. Another is to nationalise it, write off its dues (as a state-owned unit, the government can do so by recapitalising Vodafone and then paying off the spectrum and AGR or adjusted gross revenue dues to itself). It can offer the company back for privatisation later.

This will also avoid having to give Airtel the same conversion option as state units can be treated differently when it comes to equity infusions. Third, the government can ask Airtel and Jio to buy portions of Vodafone's circles as running units (minus most of the debt, as was done for Air India), so that customers are not left in the lurch.

The government is not thinking clearly on the issue. Just wanting more competition by letting Vodafone stumble on is not an option, especially in a capital-intensive industry where oligopolies are often the norm. Whether you believe that the government has no business being in business, or otherwise, you cannot decide solely on the basis of ideology.

In the case of Air India, the government decided (correctly) that it could not really run an airline and coaxed the Tatas to take it off its hands. Three years later, the Tatas are still struggling to put the air-



BEYOND IDEOLOGY  
R JAGANNATHAN

## Growing the cinema pie

There are so many happy movie business stories, you just have to look for them. Take *Sitaare Zameen Par*. Aamir Khan Productions decided to do one off OTT deal until the film, which released on June 20, had its full theatrical run. The shorter the window between a film's theatrical release and its appearance on OTT, the less likely it is that audiences will walk into the theatre to see a small film like this one, which is about the story, not about the star — a la *Pudhupai* or *Pathaan*. Since he has been critical of the two-to-six-week short window, actor Aamir Khan, who owns the eponymous studio, put his money where his mouth is. *Sitaare Zameen Par*'s success then brings courage to studios that end up doing terrible deals with streaming platforms to recover money before a release.

For another happy story, travel to West Bengal. When theatres started shutting down, going from 400 in 2000 to 140 in 2015, the largest studio in the region, SVF Entertainment, saw its collections dip. The producer of *Chokher Bali* and *Raincoat*, among other films, also owns the QTV Hotel and produces thousands of hours of streaming and TV programming. But this was a crisis. Theatrical revenue is the engine of the cinema ecosystem. Of the ₹20,000 crore that Indian films made in 2024, two-thirds comes from theatres. And it determines what streaming or television firms pay.

Much like Khan, SVF's co-founder Mahendra Soni decided to tackle this head-on. It started building, managing or acquiring screens across small towns and cities, reaching 53 screens currently. This will go to 75 by March 2026. As the screen count rises, SVF's share of the net box office collection in West Bengal doubled.

For two decades now, India's screen count — fall-

ing from 12,000 in the late '90s to 8,000 or so now — has had studios wringing their hands. The world's largest film-producing country has just six screens for a million people, compared to, say, 125 in the United States or 30 in China. And if you ask why more are not being built, theatre chains point to the 20-30 per cent occupancy of the current ones. They are right. But as SVF shows, there is another side to the story.

While a lot of investment is happening in screens, it is focussed in areas where ticket prices are high and quick returns are possible. When screens were dropping in West Bengal, Kolkata remained stable because it is a multilingual metro with higher average ticket prices. So Hindi, Bengali, Odia, and Bhojpuri cinema all have a home here. Outside of Kolkata, only Bengali films work. And without screens, that audience simply disappeared. When SVF revived theatres, entire towns came back into the game.

That brings this to the point of this column. There are ways out of endemic problems — it simply needs gumption. For too long the real issues — the lack of screens, of capital, and of decent marketing — have been hidden behind silly arguments. Multiplex versus single-screen film, OTT versus theatrical, Hindi versus South — these are the squabbles of a market where the pie has not been growing. The domestic theatrical revenue in India has hovered between ₹1,000 crore and ₹1,500 crore over five years. In 2023, a good year, 943 million tickets were sold. The "theatre-going population" stands at 122 million or about 11 per cent of the population. It is anywhere from 50 to 80 per cent in Europe and the US. The biggest hits have a footprint of about 35 million

line on an even keel (with the recent crash making things more difficult) tells us why even privatisation is not a panacea. Agile decision-making is the need of the hour not only in government, but also in the private sector.

The Tatas probably got back into aviation because Ratan Tata loved the business; but now that he isn't around to provide the passion to keep Air India flying, the Tatas also need to rethink how they must run Air India. Maybe a scaled-down, high-quality Air India is better than a scaled-up one with unlimited potential for losses.

The government also needs clarity on what exactly it wants to do with the public sector in general, beyond strategic areas like defence or banking. Before the Air India privatisation, the government seemed keen on strategic sales of some companies (Bharat Petroleum, Shipping Corporation, Coal India, and IDBI Bank), but the agenda seemed to have wandered off into a decision-making abyss. There is talk of IDBI Bank being on the sell-off list this financial year, but one cannot bet on this.

As for the banks left out of the merger process of 2019, we don't know if some will indeed be privatised or end up being merged with stronger banks when their balance sheets weaken — as they could at some point. The fact that public sector balance sheets are healthy right now seems to give the government comfort about retaining them indefinitely as taxpayer assets.

Two years after Mr Modi took over as Prime Minister, the Department of Disinvestment was renamed the Department of Investment and Public Asset Management (Dipam). The focus shifted from rescuing banks and preventing their misuse by meddlesome ministers and bureaucrats to extracting value from public investments through dividend payouts and asset monetisation.

But Vodafone will bring the issue to a head once more. With ₹2.3 trillion in debt, much of it owed to public sector banks, a default or liquidation would dent bank balance sheets. With one public sector unit (BSNL) nowhere near profitability, another in default, and a half-private sector unit (Vodafone) about to go belly up, where exactly does this leave the government's telecom policy? Why balk at nationalising Vodafone when you are already halfway there, and the company is sending SOS after SOS to the government and banks to save it from liquidation?

Governance alone cannot rescue public (or private) sector companies when the winds of competition go against them. One need not take a doctrinaire approach to nationalisation or privatisation, for either may work in different circumstances. There is a presumption that a government that does not meddle with the operations of a company has every right to keep running those companies. However, this would be short-sighted.

Sooner or later, the Modi government has to make up its mind on leaving behind a legacy of good governance in the public sector, and this means letting at least some of them be privatised, and insulating the rest from government meddling. There is no halfway house, and good governance cannot be the result of one administration's good intentions alone.

One does not have to be ideologically committed to privatisation (or the opposite, to strengthening the public sector), as long as the decision stems from a well-articulated game plan that is suited to a specific context. Right now, we can't be sure what that game plan is.

The author is a senior journalist



MEDIASCOPE  
VANITA KOHLI-KHANDEKAR

That brings this to the point of this column. There are ways out of endemic problems — it simply needs gumption. For too long the real issues — the lack of screens, of capital, and of decent marketing — have been hidden behind silly arguments. Multiplex versus single-screen film, OTT versus theatrical, Hindi versus South — these are the squabbles of a market where the pie has not been growing. The domestic theatrical revenue in India has hovered between ₹1,000 crore and ₹1,500 crore over five years. In 2023, a good year, 943 million tickets were sold. The "theatre-going population" stands at 122 million or about 11 per cent of the population. It is anywhere from 50 to 80 per cent in Europe and the US. The biggest hits have a footprint of about 35 million

people or just 2 per cent of the population. That is because for a vast number of Indians, there is no local cinema.

Note that the cumulative consumption of cinema is huge. One-fourth of all TV viewing, a third of OTT and three-fourths of all music consumption is film. But it doesn't reflect in our ticket sales. Over three decades, the vicious circle has formed. The lack of screens means less money and therefore fewer films being made. For a short time, satellite — and now streaming — gave quick money, squeezing theatres further. Much of this was aggravated by the pandemic. The result — the main revenue source is apocryphal, even while people continue to step out for entertainment. Only when two billion and more people are sold, more people will be willing to watch films more often, will the Indian film business reflect the country's size and potential.

But this needs more than an SVF in West Bengal or a PVR-Inox in the South. It requires some state intervention too — maybe a tax holiday for building theatres since they are infrastructure? That is how the multiplex boom began in 2001. And it needs more non-strategic investments, a la Adar Poonawalla in Pharma Productions on the studio side.

The last, not-so-happy story. Given the competition film faces from other forms of entertainment, it is a pity that studios do not apply their mind to marketing, which has become formulaic and totally online. At a *Mission Impossible* — *The Final Reckoning* show recently, there was not a single poster or standee at Inox Insignia (Pune) for a selfie. Ditto for a Bengali movie friends saw there later, and for *Sitaare Zameen Par* at a Cinepolis. If movies are marketed only online and only to audiences who are likely to watch them, how will the market expand?

<https://x.com/vanitakohli>

## Tribals and the Hindutva framework



ADITI PHADNIS

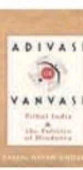
RSS's thinking on the tribal question. With 1,08,735 active beneficiaries of hostels and education centres, the VKA has become a major pillar of the Sangh Parivar now. It was founded in 1952 by Ramakant Keshav Deshpande and Rumbhau Kerkar, with the financial and moral support of the Maharaja of Jashpur, Vijaydev Bhushan Singh Judev, whose successors later led the movement called Ghar Wapsi. It was posed as the response to the activities of Christian missionaries that caused as much concern to the Congress in the 1930s and 1940s as to the RSS. The first chief minister of Central Province (the precursor to modern-day Madhya Pradesh, Chhattisgarh and Maharashtra) was Ravishankar Shukla from the Congress who actually nudged the RSS to form an organisation to stave off separatist tendencies that he felt were being fuelled by missionaries. Parenthetically, Madhya Pradesh was the first state in India to

promulgate an anti-conversion law — piloted by the Congress.

The author describes the initial ideological and moral struggles of those who led the VKA: To accept material support from the state or not? This was a core issue as the RSS has time and again described itself as a socio-cultural organisation. Initially, Deshpande was appointed as regional director of the Tribal Welfare Department by Ravishankar Shukla, on the recommendation of Gandhian Bhaskar Ranga. But he resigned because he felt fettered. The challenges would become more complex: Tribal leaders such as Birsa Munda and Jaipal Munda led struggles against the British on land issues. But VKA and the RSS capitalised on the fact that Birsa Munda became a Roman Catholic, returned to Hinduism, and warned tribalists about the dangers of proselytisation. Anti-colonial fighter for tribal land rights? Or a tribal who led the movement

for the Hinduisation of tribes? Subaltern? Or an advocate for Hinduisation of tribes?

How VKA should view organised Hinduism and tribal worship was another big issue. This would segue into the current debate about the place of the Sarna, the tribal religious code, should have, especially in the current context of the Uniform Civil Code (UCC). While seeking to protect some tribal cultural practices, the VKA has denounced the demand for the Sarna Code, which it sees as a separate religion. And there are other practices, including the issue of beef in the North-east. The book says that lately, the VKA has supported leftist activism led by the All India Union for Forest People (AIUFP) in the tribal regions, contradicting the Bharatiya Janata Party's political stance.



Adivasi or Vanvasi: Tribal India and the Politics of Hindutva by Kamal Nayan Choubey. Published by Penguin Random House India. 281 pages. ₹799

book notes that even in 2023, Chhattisgarh Chief Minister Vishnu Deo Saik, who has been active in VKA, has demanded that those who converted should not get reservations in jobs or education as they were no longer tribals. The book has a brief discussion on

VKA's role in leading intellectual discussions on the tribal question in the framework of political thinker Antonio Gramsci. As opposed to organic intellectuals, he considers VKA traditional intellectuals. There could be some definitional problems with this proposition.

The VKA may be a part of the RSS but in some ways it is ploughing a lonely furrow. It has not held back from criticising anti-tribal statements by some ministers in the Narendra Modi government while being careful in excluding Mr Modi from any criticism. But VKA's legacy is also rooted in stereotypes like the one Golluwar made in 1969. When asked if *Sanskrit* (Sanskrit) could be imparted to the nomadic tribes, his answer was: "If we could domesticate even the wild animals roaming the jungles, can we not persuade our people to take the better and more civilised ways of life? Certainly we can, provided we display the human touch". Even today, the issue is not in Indian society and politics needs to read this deeply researched book that is brimming with new ideas.



# Opinion

TUESDAY, JULY 8, 2025

## Storm over CAFE

Car fuel efficiency norms should not chase illusory uniformity

**A** DEEP DIVIDE has emerged within the auto industry over the proposed Corporate Average Fuel Efficiency (CAFE) III norms, scheduled to take effect in April 2027. At the centre of the controversy is Maruti Suzuki's appeal for relaxed emission standards for small cars, which has drawn opposition from rival manufacturers who want the government to stick to a uniform CO<sub>2</sub> target of 91.7 g/km across all passenger vehicles. While a single emission benchmark may appear equitable on paper, the shifting auto landscape, from small hatchbacks to heavier sport utility vehicles (SUVs) and compact SUVs, and even electric vehicles, suggests that a one-size-fits-all approach may not be viable in practice. CAFE norms are essentially emission report cards that rate a carmaker's entire fleet, not individual models. Smaller, lighter cars like the Maruti Alto naturally emit less CO<sub>2</sub> and have historically helped balance out emissions from larger, bulkier vehicles. However, CAFE III calculates targets based on vehicle weight. This weight-based approach allows high-emission, heavy vehicles more relaxed CO<sub>2</sub> thresholds while penalising lighter cars by subjecting them to disproportionately stricter standards. This threatens the viability of small, affordable cars.

Maruti Suzuki, which holds nearly 40% market share, has argued that this system disadvantages fuel-efficient, low-emission small cars. Chairman RC Bhargava has voiced concern over the affordability crisis in the small car segment, pointing out that sales have declined 35% between FY17 and FY25, while regulatory mandates have inflated prices. With only 12% of households earning above ₹12 lakh annually, rising costs risk pushing even entry-level vehicles out of reach. From Maruti's perspective, the issue isn't about sidestepping environmental obligations; it's about ensuring that regulatory frameworks do not choke access to mobility for the average household.

Tata Motors, Mahindra & Mahindra, and Toyota are opposed to differentiated standards, maintaining that any relaxation undermines collective efforts to lower emissions. Yet this disagreement shows deeper self-interest. While these companies are against concessions for small cars, some are simultaneously urging leniency in categories like light commercial vehicles, citing affordability for small enterprises. Thus, each manufacturer is effectively protecting its market stronghold under the guise of fairness or sustainability. Moreover, the argument for strict uniformity appears inconsistent when seen in light of existing tax structures. The goods and services tax system already applies differentiated rates depending on a vehicle's size, fuel type, and features. A similar tiered logic could sensibly be extended to emission standards as well. This would be in line with global practices. Major auto markets like the US, China, Japan, Korea, and Europe offer regulatory protection for small, lightweight cars under their CAFE frameworks, recognising their environmental and socio-economic benefits.

Past compliance records add further nuance. While CAFE I (2017-2022) was easily met due to the then dominant presence of small cars and relatively relaxed targets, CAFE II (2022-2027) has proven more challenging, especially as SUVs gained ground. Reports indicate that at least eight manufacturers exceeded the 113 g/km limit in FY23. CAFE III's stricter benchmarks thus come at a time when industry dynamics are increasingly skewed towards heavier vehicles. A rigid application of standards across segments risks making car ownership a luxury. The government must, therefore, act as a mediator and design a flexible framework that should include differentiated targets, segment-wise adjustments, or weighted credit systems. The path forward must balance environmental responsibility with equitable access to mobility, ensuring that regulation serves progress, rather than some illusory uniformity.

## AI talent war is the stuff of Steve Jobs' nightmares

**YOU WOULDN'T HAVE** exactly called the late Steve Jobs a "man of letters," but he certainly lived a soaring email. One of the Apple Inc. co-founder's most famous writings is this 2005 memo to Bruce Chizen, Adobe Inc.'s chief executive officer at the time:

*Bruce, Adobe is recruiting from Apple. They have hired one person already and are calling lots more. I have a standing policy with our recruiters that we don't recruit from Adobe. It seems you have a different policy. One of us must change our policy. Please let me know who.*

Steve The email, along with many others, was submitted as evidence in a fascinating legal saga between the Department of Justice's antitrust unit, eight Silicon Valley companies, and tens of thousands of tech employees who contended their earnings were repressed because of this collusion between company bosses. The companies—Apple, Adobe, Google, Intel, Intel, eBay, Pixar, and Lucasfilm—were ultimately forced to pay almost \$500 million in settlements.

Thanks to his way with words, Jobs made himself the centre of attention in what is surely one of the most courted hands in the history of the US tech industry. "I would be very pleased if your recruiting department would stop doing this," he wrote to Google President Eric Schmidt in 2007, forwarding a cold email from Google's recruiting team. The recruiter was promptly fired.

Today, as some of the same players become locked in AI talent wars, we're starting to get a sense of what Jobs was so afraid of: A no-holds-barred fight for the best people, with employees holding all the cards. Top engineers are being courted like starting pitchers and star quarterbacks. Meta Platforms Inc., for instance, is going after talent with "pay packages of up to \$300 million over four years," reported *Wired*, citing internal sources. (Meta disputes the framing.)

Whatever the size of the packages, the aggression is causing considerable anguish among company leaders. "I feel a visceral feeling right now, as if someone has broken into our home and stolen something," wrote OpenAI's chief research officer, Mark Chen, in a memo obtained by *Wired*. Meanwhile, OpenAI CEO Sam Altman, while fiercely competitive, knows better than to try to do what Jobs did and stop companies from poaching his talent with quiet backroom deals. For one thing, the main players seem to have a growing contempt for one another. And more significant, the option for talented AI engineers isn't limited to the largest companies. "Compared to the past," points out Firas Sozan, CEO of tech recruitment group Harrison Clarke, "you don't need as many engineers to build a product. I think partly why Mark Zuckerberg is doing this is because an amazing engineer will just end up speaking to Intel Capital or Andreessen Horowitz and get terms sheets to start their own company."

OpenAI's pitch to prevent its workers from leaving is to make the case that artificial general intelligence is the company's one and only true goal, and every part of its work is dedicated to achieving it, whereas those working on Meta AI will spend at least some of their time thinking about how it can be used to better serve up shoddy viral videos to your grandmother. "Missionaries will beat mercenaries," Altman said to staff in a memo.

AI companies can't rely on the bully tactics employed by Jobs to keep employees from seeking better and more lucrative opportunities. Instead, leaders must convince employees that their AI work is the one that will matter most in the history books. Whether employees will buy it is another thing.



**DAVE LEE**  
Bloomberg

SEBI'S ACTION AGAINST JANE STREET IS A STEP FORWARD, BUT SYSTEMIC REFORMS ARE ESSENTIAL

## Resisting the quick buck

### ● CAPITAL MARKETS

#### ● INCREASING RELEVANCE

Prime Minister Narendra Modi

Today, as the world order faces pressures from all sides, and the world is going through many challenges and uncertainties, the increasing relevance and influence of BRICS is natural



#### NILESH SHAH

Managing director, Kotak Mutual Fund



**I**N A QUIET village, a small market for curd thrived, where buyers paid upfront in cash. Alongside, there was a bustling derivatives market for future curd deliveries, where participants paid only a small margin upfront. Prices in both were interlinked, but the derivatives market dwarfed the spot market in trading volume. This set-up attracted quick money addicts—speculators chasing a "zero to hero" trade, gambling in the derivatives market.

Enter a wealthy merchant from outside. Noticing the high trading volumes, he flexed his financial muscle, buying large quantities of curd in the spot market in the morning and driving up prices. The derivatives market followed suit, with curd futures prices soaring in tandem. By afternoon, the merchant escalated his game. He sold call options on curd at inflated prices, signalling to the market that prices would keep rising, while simultaneously buying put options at lower-than-market prices.

Quick money addicts, lured by the steady price uptrend and convinced of further price rises, jumped in. They sold out of the money put options at low premiums, hoping to pocket the premium for quick profits. Some bought deep out of the money call options at low premiums, hoping that prices will rise to astronomical levels.

But late in the afternoon, the merchant pulled the rug. He dumped his curd holdings in the spot market at throwaway prices, causing a sharp collapse in both spot and derivatives prices. The quick money addicts faced devastating losses. The merchant, while incurring some losses on his spot market sales, reaped massive profits in the derivatives market. Week after week, the merchant repeated this cycle at the village market, amassing wealth while the addicts suffered crushing losses. Eventually, the village market heard caught wind of the scheme and ordered the merchant to repay his ill-gotten gains. This story mirrors the Securities and Exchange Board of India's (Sebi) recent order against Jane Street, a high-frequency trading (HFT) firm. On April 13,

1919, thousands of unarmed Indians were killed in Jallianwala Bagh. In our futures and options (F&O) markets, a similar massacre occurs every week, where millions of Indians get killed economically, not by bullets but by their greed. Sebi warns that nine out of 10 speculators lose money. Unfortunately, all 10 believe they belong to the winners' category.

Let's explore the broader implications and potential solutions to prevent fools and their money getting separated in capital markets.

#### Would HFT firms dare do so in China?

It's unlikely that an HFT firm would attempt such a trade in China's markets for three reasons. First, Chinese markets are largely closed to foreign speculators for such activities, limiting access. Second, Chinese regulators wield formidable power, employing tactics akin to *san, dam, deng, xue* (persuasion, fines, punishment, or division) to enforce deterrence and compliance. Third, the memory of a well-known hedge fund being squeezed by the China Investment Corporation in a short renminbi trade serves as a powerful deterrent. India's markets, by contrast, appear more vulnerable, lacking similar restrictions or fear-some power to regulate.

#### Strengthen regulatory powers

Sebi's order against Jane Street demonstrates its ability to detect manipulation through meticulous data analysis, but the broader legal framework for the same remains inadequate. Cases from the 1992 securities scam still linger—companies go bankrupt but not the promoters, under-

scoring the system's inefficiencies. In contrast, the US legal architecture enabled Irving Picard to recover nearly every penny forfeited by Bernie Madoff's Ponzi scheme. India's legal architecture faces constraints in knowledge, infrastructure, and case backlogs, allowing manipulators to exploit the system. Commercial crimes, like market manipulation, often cause greater societal harm but face lenient treatment due to the absence of a "dead body". Empowering Sebi with robust legal tools

and fostering a fear of swift punishment are critical to deterring future violations.

#### Move beyond Indian Carbide mentality

The 1984 Bhopal disaster saw Union Carbide escape with minimal consequences despite causing one of the world's worst industrial tragedies. Similarly, Sebi's order against Jane Street, based on impeccable analysis of 21 trading days, must go beyond recovering manipulated profits. An exemplary penalty is needed to deter future manipulations.

#### Need for counterbalancing mechanisms

India's institutional investors, often limited to volume-weighted average price orders, lack the aggression or leverage to counter HFT firms effectively. Regulations rightfully restrict their ability to short markets or write unhedged options, but this leaves a gap in the market's defences. A new institutional mechanism equipped with advanced data analytics, high-speed connectivity, and access to leverage is needed, as is the ability to act decisively to neutralise HFT dominance.

#### Quick-money addiction

Quick money addicts, like drug addicts, chase instant gratification, often egged on by social media influencers promising sky-high returns through stock tips, crypto speculation, or Ponzi schemes. In some cases, they just pretend to be successful fund managers. They are akin to the mythological demon *Kalutali*—slay one, and a hundred more emerge. Just as the drug trade faces stringent controls, higher policing, restrictions on advertising and marketing, and severe punishment (at least on paper), speculative financial products and manipulative practices need controls. A concerted regulatory effort backed by effective policing, including swift and exemplary penalties, could curb this menace.

#### Power of financial education

A Gujarati proverb warns that crooks thrive where greed abounds. The antidote to greed is financial education, emphasising disciplined investing, the risks of trading, and the dangers of leverage. Sebi's "Mutual Fund Sahi Hai" campaign has raised awareness about mutual funds. A similar and perhaps a slightly more hard-hitting approach is needed. Statutory warnings, like those in the tobacco industry, or a levy on F&O trading to fund investor warning campaigns could drive home the risks. Requiring traders to pass exams before engaging in leveraged trading may filter out reckless participants.

#### Conclusion

Unchecked financial muscle and speculative frenzy can destabilise markets, leaving retail investors vulnerable. Sebi's action against Jane Street is a step forward, but systemic reforms are essential. Strengthening regulatory powers, creating counterbalancing mechanisms, treating commercial crime seriously, curbing speculative mania, and prioritising financial education are critical to safeguarding India's markets. Only by addressing these issues head-on can India prevent its markets from becoming playgrounds for manipulative merchants.

## Car emission control: No hot pursuit

Relaxation in CAFE III for small cars would be a step in the right direction, because it would catalyse industry to think more as engineers



#### BVR SUBBU

The writer is an auto industry veteran and member of the Board of KPIT Technologies

**THE CORPORATE AVERAGE** Fuel Efficiency (CAFE) norms deal with overall fuel consumption, specifically the quantity of fuel consumed which is generally considered proportional to the fuel efficiency and weight of the car. Clearly, the government—considering the overriding national priority of controlling the growth in imported petroleum, oil, and lubricants consumption—is committed to cut fuel consumption and control overall CO<sub>2</sub> emissions.

The CAFE target of each manufacturer is calculated by first deriving the average kerb weight of models for individual manufacturers. Then by scaling the industry average target to the weighted average kerb weight the manufacturer-specific CO<sub>2</sub> target is derived. And finally, it mandates that the achieved CAFE of the manufacturer for each year is based on the weighted average of the cars sold across their fleet, and the CO<sub>2</sub> emissions of each model have to be lower than or equal to the manufacturer-specific target to achieve compliance with CAFE II norms.

Given national priorities, the government had probably hoped for the auto industry to raise its technology and engineering capabilities and create powertrain solutions that would achieve this goal. Unfortunately, there are possible reasons. Industry players could simply lower the weight of their fast-selling models by

using, say, composites for rear doors, lower thickness of steel in some areas of skin panels, and so on, or just have smaller engines. Simultaneously, manufacturers could, to some extent, increase the weight of some medium-size volume models so that the average kerb weight goes up but the CO<sub>2</sub> target also goes up somewhat. They could also weed out low-sale but high-emission models from their line-up and achieve their goal.

If this was so with CAFE II, the CAFE III proposed to be implemented from April 2027 could only serve to heighten this perverse effect. As presently proposed, the new norms will undoubtedly work in favour of bigger cars, not necessarily in favour of the national priorities of controlling fuel consumption and emission.

Manufacturers love larger cars for the simple reason that they make them far greater profits than small cars. A 20% increase in material and conversion costs over a small car could potentially raise per unit profitability by 100%. In such circumstances, who really cares for national priorities?

Correctives could of course include size-based CAFE III norms which could

help ensure auto original equipment manufacturers move beyond numerator-denominator games, and actually spend as much money on engineering development as they do on advertising.

The argument against size-specific CAFE III norms used by the auto companies is that consumers are moving away from smaller cars to larger cars. But there may be more to that trend than meets the eye. A lot of first-time buyers are still probably opting for smaller and used cars. It is very likely that the huge growth of mid-segment cars is actually based on demand from multiple car-ownership families, and/or from second-time buyers who have been to move up the value chain. Does manufacturing for either of these trends serve an overall national interest, or merely shareholder interest? That is the basic question the industry has to ask—and answer.

Again, if industry is really engineering-focused, perhaps it ought to look to creating new powertrain engineering solutions. One Chinese manufacturer revealed, a few years back, a plug-in hybrid electric vehicle powertrain solution with a 1.5L 130PS IC engine that returned a stunning 60 kmpl range!

Imagine what that means—any multi-utility vehicle/sport utility vehicle rolled out with such a powertrain could potentially meet, even exceed, CAFE norms, and push industry towards a virtuous development cycle without sacrificing the overall national priorities. What really stops our own home-grown giants or our MNC players from bringing such technologies? Do they not have the ability or the desire? Or is it some combination of both put in the harsh beam of quarterly number targets by stockmarket analysts who know, understand, or care little for the future? At the risk of sounding cliché, it has often appeared to me that the EV (electric vehicle) thrust of some of our auto giants is probably as much a serious commitment to EVs as it is a way of meeting CAFE norms.

Relaxation in CAFE III for small cars, as apparently proposed by Maruti, would without doubt be a step in the right direction, because it would then catalyse industry to think more as engineers—and less as bean counters. Yet, beyond even this, could the government think of random testing of vehicles from dealers' stockyards for compliance, and put in place the strongest deterrent possible to go against shenanigans like the GM fiasco sort which are probably more rampant—not by design—but that industry would care to admit?

### LETTERS TO THE EDITOR

#### Proceed with GM cautiously

Apropos of "GM hitches and hits" (FE, July 7), the pressure exerted by the US on India to open up its agriculture and dairy sectors, during the trade talks, is huge. The firmness with which India negotiates on various items with a mandatory exclusion of these two vital sectors deserves a pat. Adopting genetically modified (GM) varieties of crops in Indian fields would spur

political and farmers' protests as there is genuine fear of losing the significance of traditional country seed varieties. The lessons learnt from taking the GM Bt cotton crop to the fields cannot be forgotten. Increasing production of rice, wheat, cereals and pulses is necessary to sustain food security but surely not at the cost of the health of the producer, consumer, and the soil. The recent successful tests of three genome-edited rice varieties await legal recognition. We

must not hasten in embracing GM crops, as food safety comes first. —RV Baskaran, Pune

#### Sebi shows its teeth

Apropos of "Lessons from Jane Street" (FE, July 7), kudos to the Securities and Exchange Board of India (Sebi) for taking on Jane Street. The fact that the firm took an early warning lightly means it is a repeat offender. Nitin Kamath is right in his assessment that this move will have a cascading effect

on retail activity. Sebi has its task cut out to keep its house clean. If both brokers and mutual fund houses are crying foul over market manipulation by high-frequency trading firms, it cannot be brushed under the rug. Retail investors have been putting their hard-earned money and faith into the market month after month, and that must be protected at all cost. —Bal Govind, Noida

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thehindubusinessline.  
TUESDAY • JULY 8, 2025

## Crypto menace

Disregarding US, India must stick to crypto regulation

**E**ver since Donald Trump took over as President, the regulations in the US have become much more favourable to stakeholders in the cryptocurrency ecosystem. Not only has the new administration relaxed curbs and scrutiny on investors and companies in this space, it is also helping boost the price of cryptocurrencies through its strategic crypto reserve. The Indian government, however, need not toe the US' line in regulating crypto assets.

In a recent interview to this newspaper, Finance Minister Nirmala Sitharaman rightly said that India must adopt 'its own studied approach' in framing crypto regulations — one where innovation continues, but with adequate checks and balances. The Trump administration's moves regarding the crypto industry have been quite bizarre. In a presidential order in January, the Biden administration's efforts to frame a comprehensive crypto regulation, looking at money-laundering and other risks, was scrapped. Work on creating a central bank digital currency was also stopped. Instead, a strategic bitcoin reserve was created using crypto assets, notwithstanding civil or criminal proceedings. The Trump administration's resolve to continue to build this stockpile has resulted in taking the price of bitcoin and other crypto assets to record highs. Other countries are unlikely to build similar reserves, given the extremely volatile price movement in crypto assets which can compromise the external account.

The strategic reserve has been followed by the passing of the GENIUS (Guiding and Establishing National Innovation for US Stablecoin) Act by the US Senate. These rules here appear to be less anarchic. The Act allows only issuers identified by the government to launch stablecoins which need to be fully backed by dollars, short-term US treasury bills or bonds, bank deposits or money market funds. Since the stablecoins will be linked to the dollar, they may turn out to be more stable than cryptos. Violations of the law could lead to fine of up to \$1 million or imprisonment of up to five years. This Act will become a reality once the House of Representatives passes it. This could lead to a slew of stablecoin launches in the US.

India can shrug aside such developments in the US and continue working on its central bank digital currency, both the wholesale and retail versions. With cross-border payments between many countries being done in local currencies, CBDCs can play a large part in facilitating this. While the retail CBDC adoption is slow so far, it can gain traction going forward as the use of physical currencies declines. As far as the regulations of private cryptocurrencies such as bitcoin go, India needs to continue working towards a global regulatory framework which includes information-exchange between countries. Given the dispersion of miners, traders and users across geographies, it is not possible for a single country to crack down on misuse of these assets. A global framework is the way forward, regardless of the path the US adopts.

### OTHER VOICES.

## The Guardian

### BBC's independence and funding face challenges

The BBC will soon charge US users for full news access. In Britain, it may seem a distant prospect, but if universality can be dropped abroad, how long before it's tested at home? With the BBC's charter due for renewal in 2027, the funding debate is intensifying. What becomes of the licence fee will define the broadcaster's future. There is increased scrutiny of Auntie's independence and impartiality after political pressure was applied through censure, funding freezes and contentious board appointments. What the BBC should look like in a fragmented media landscape is uncertain. A big question is whether the licence fee levied on households should be replaced by subscription, limited advertising or public funding. The last option is surely a non-starter, opening the door to more direct political control. [JONKIN, LONDON](#)

## GLOBAL TIMES

### Why the spirit of 'greater BRICS' resonates worldwide

The 17th BRICS Summit marks the first high-profile gathering of the 'greater BRICS family' in its new '11+10' format — comprising 11 member countries and 10 partner countries — following Indonesia's official entry into the BRICS cooperation mechanism in January and Vietnam's official joining as a BRICS partner country in June. The summit is themed 'Strengthening Global South Cooperation for More Inclusive and Sustainable Governance'. As the world is entering a new period of turbulence, characterised by rising unilateralism and protectionism, and some major powers increasingly disengaging from international governance, BRICS remains steadfast in its original aspiration, focusing squarely on cooperation and development. [AKHIL, NEW DELHI](#)

### POINT BLANK.

LOKESHWARRI SK

**T**he BRICS summit 2025 has drawn to a close with the usual commitment to forge cooperation in the Global South and the expected tirade from Donald Trump. But there was plenty of drama ahead of the summit, with the Indian government going to great lengths to clarify that members of the bloc are not conspiring to dethrone the dollar. The MEA Secretary had clarified that the members are only evaluating alternative channels to trade in national currencies to protect themselves from geopolitical vulnerabilities and that it should not be construed as a move towards 'de-dollarisation'.

This is a classic case of the lady protesting too much. With the trade negotiations with Trump administration nearing the final stage, the Indian government does not want to be seen to be working closely with China and Russia to find an alternative to the dollar. Especially when the US President had held out a stern warning in January, saying, "We are going to require a commitment from these seemingly hostile countries that they will neither create a new BRICS currency, nor back any other currency to replace the mighty US dollar or, they will face 100 per cent tariffs." But despite these threats, the BRICS is certainly trying to create a viable alternative to reduce the dependence on the dollar and the US backed multilateral institutions. Creation of a BRICS currency may not be a reality anytime soon, but BRICS PAY, an alternative to SWIFT, is already operational with Russia and China as the main users. Many of the members are also settling trade with each other in local currencies.

The strategy being adopted by the BRICS appears a smart one. They are not challenging the dominance of the dollar explicitly; but are slowly working on reducing the dependence on the 'mighty' dollar. The results of this transition will be evident ten years later.

### GROWING CLOUT OF BRICS

The US and its President have a reason to fear the growing clout of the BRICS bloc. While it was quite toothless in its initial years, with the only binding factor being the Goldman Sachs report in 2001 pointing towards Brazil, Russia, India

**The US and its President have a reason to fear the growing clout of the BRICS bloc. While it was quite toothless in its initial years, it is now turning into a mighty force**



and China as the growth drivers in the next few decades. But the group is now turning into a mighty force comprising all the important countries in the Global South. While the inclusion of South Africa in 2011 expanded the bloc, slightly, the Russia Ukraine war in 2022 turned out to be the game-changer for this bloc. The addition of six new members in 2024 — Egypt, Ethiopia, Indonesia, and Iran, Saudi Arabia, and the United Arab Emirates — has now made the bloc a force to reckon with.

The BRICS members may be developing countries, but together they account for 29 per cent of global GDP on purchasing parity basis. They account for 48.5 per cent of the global population, which provides them a large market for their produce.

The vast land masses of Russia and China imply that 36 per cent of earth's territory is with BRICS. More important, the rare earth minerals which are needed to drive the emerging technologies are concentrated here; 72 per cent of these reserves are owned by BRICS members. With UAE, Iran and Saudi Arabia joining the bloc, 43.6 per cent of the global oil production and 36 per cent of natural gas production is from BRICS members.

The BRICS mandate of increasing the influence of Global South countries in international governance and improving the 'legitimacy, equity in participation, and efficiency of global institutions such as the UN, IMF, World Bank, and WTO' appears to be resonating with many countries.

It's therefore not surprising that more countries are now wanting to join the BRICS. A new category of BRICS partner countries was formed through the Johannesburg Declaration in 2024. The BRICS partner countries are Belarus, Bolivia, Cuba, Kazakhstan, Malaysia, Nigeria, Thailand, Vietnam, Uganda, and Uzbekistan.

**BRICS PAY** The BRICS is still in its formative stage, evaluating areas where it can be

### BRICS: FROM STRENGTH TO STRENGTH

Share of global GDP (in PPP at current rates) of the 11 BRICS members in 2023

Growth rate of BRICS members in 2024 according to IMF

Share of global population growing above global average

Share of total territory on earth

Ownership of globe's rare earth reserves

Share of total global oil production

Share of global natural gas production

Share of global mineral coal production

effective. But its ability to come with an alternative to the dollar and West-controlled trade settlement systems is undisputed. Though creation of a BRICS currency was on the table at one point, and the New Development Bank which can facilitate this is also in place, launching a common currency appears next to impossible at this juncture. Brazil and Russia are willing to work towards it, but

India, China and South Africa seem quite reluctant. China's inevitable dominance in the currency bloc will not be acceptable to others including India. Also, the belligerent statements being issued by the POTUS against the launch of a common currency is making the bloc tread cautiously in this regard.

But they are certainly moving ahead in reducing the dollar's dominance. The first step has been an increase in bi-lateral trade settlement in local currencies. India too has been settling its trade with Russia, the UAE, Sri Lanka, Nepal, Bhutan and Iran in local currencies in the last couple of years. China is already settling almost 30 per cent of its trade in yuan.

Russia and China have spearheaded the creation of an alternative platform for cross-border trade settlement — BRICS PAY. This payment system is already linked to 75 countries and is evolving as a strong contender to SWIFT. BRICS PAY enables settlement in 23 currencies including the dollar, yuan, rupee and the currencies of all other BRICS countries.

BRICS PAY is designed in such a way that it uses the banking infrastructure of the participating countries, so the payment is made in the internal payment system of the participating countries, due to which the funds move fast.

In the declarations after the BRICS summit 2025, it was said, "We task our ministers of finance and central bank governors, as appropriate, to continue the discussion on the BRICS Cross-Border Payments Initiative, and acknowledge the progress made by the BRICS Payment Task Force (BPTF) in identifying possible pathways to support the continuation of discussions on the potential for greater interoperability of BRICS payment systems."

The bloc is, therefore, in the process of putting together an alternative channel, brick by brick. How many of the members adopt it and whether it can challenge the West-led institutions, only time will tell

## Will Dreamfolks-Adani fracas hit airport lounge access?

Axis Bank, ICICI Bank card-holders can continue to access Adani group-run lounges unless terms and conditions are changed

### bl.explainer

Anesh Phadnis

### Who runs lounges at various airports in the country?

Travel Food Services Private Ltd (TFS), Saptagiri Restaurant Private Ltd and Encalm Hospitality Private Ltd are top three lounge operators in the country. Adani group operates seven airports and these have 17 lounges. The lounges at Adani airports are run by the group in partnership with other companies including TFS.

### How is the access to the lounges determined?

There are primarily two types of lounges — those which are exclusive to an airline or an airline alliance (Star Alliance, SkyTeam or oneworld) and common use lounges developed by airports. Currently, among airlines, only Air India has an exclusive lounge at Delhi airport. While the Air India lounge for domestic passengers is operational, the one on the international side is under renovation. Common use lounges developed by airports is the prevalent type in India.

Access to lounges is generally available to top tier members of loyalty programme, first or business class passengers of airlines and credit card holders.

According to the Crisis Intelligence report of June, 70-80 per cent of passengers access airport lounges using their credit card programme.

### What is the DreamFolks controversy all about?

DreamFolks, which is a travel and lifestyle aggregator, began operations in 2013. DreamFolks has tie-ups with lounge operators, banks, card networks, airlines and other corporates. With these tie-ups it facilitates access to airport lounges through its platform. The company generates significant share of revenue on a per passenger basis (by levying a pre-determined fee on its clients) which is recognised when a user swipes or taps credit card/debit card at the lounge.

Earlier this week DreamFolks notified stock exchange that certain programmes of ICICI Bank and Axis Bank have been discontinued from July 1. Its promoter Libertha Kallat also accused airport



ADANI GROUP. Claims intermediaries no longer required for accessing lounges

operators of pressure tactics that had resulted in closure of programmes.

### What changes have been made by Adani group at its airports with respect to lounges. Does it impact passengers or cardholders?

The Adani group says that intermediaries are no longer required for accessing lounges as Indian banks are now directly collaborating with the group to enhance service quality and experience for their customers.

Bank card-holders may access lounges either via a swipe of card at EDG machines or through pre-booking via a QR code process.

This programme offered by Adani Digital Labs covers all lounges at the group-run airports.

Thus, the DreamFolks controversy has no impact on passengers. Cardholders of Axis Bank or ICICI Bank can continue to access the lounges unless terms and conditions are changed by banks.

### What's the road ahead for DreamFolks?

DreamFolks said it is currently evaluating the exact potential impact of ICICI Bank and Axis Bank's actions, and it is likely to be material in nature. The company is committed to taking requisite actions for mitigating the impact. "We would like to assure our investors that this is a temporary phase. We remain fully committed to long term wealth creation and are actively evaluating all possible alternatives to mitigate any potential impact," promoter Libertha Kallat said.

✉ **LETTERS TO EDITOR** Send your letters by email to [bleditor@thehindu.co.in](mailto:bleditor@thehindu.co.in) or by post to 'Letters to the Editor', The Hindu Business Line, Kasturji Buildings, 859-860, Anna Salai, Chennai 600002.

### Expiry day manipulation

This refers to 'Crooked Street' (July 7). SEBI's action against big time traders like Jane Street for manipulating Bank Nifty options and equity settlement price through expiry-day bulk trades was long overdue. The case exposes a clear instance of unjust enrichment, by artificially depressing index levels in the final minutes of expiry benefiting from derivatives positions at the direct expense of retail investors, who make up over 90 per cent of the market.

Such two-way expiry-day trades (sell before expiry, reverse after) distort price discovery in a zero-sum market. While SEBI's disgorgement order is welcome, it raises a larger

question: How will SEBI compensate the lakhs of retail investors who lost money due to such privileged manipulative practices? Regulatory action must go beyond punishment and also restore trust through SEBI must also urgently ban reversal-based expiry-day trades, investigate other institutional traders and FPIs, and ensure equal access to trading infrastructure to protect market integrity. **Srinivasan Velamuri** Chennai

**Elon Musk vs Trump** Elon Musk has stirred a storm in American politics by launching the 'American Party', a claim for revolution, promising to restore the

lost freedoms of the people. His ire stems from Trump's 'One Big Beautiful Bill', which he calls 'madness' that will drown the nation in debt. The bill, making tax cuts permanent, boosting military spending, and slashing social welfare programmes, threatens companies like Musk's Tesla. Musk's financial clout and X's reach make him formidable, yet his history of third parties and his unclear policies pose challenges. **RK Jain 'Arjune'** Bangalore, KAP

**UCB regulation** Apropos 'We need more urban co-op banks' (July 7). While the RBI Director's views are valid for

inclusive banking growth and outreach, a major issue that is haunting the depositors is the sense of insecurity due to UCB failures. There must be concerted efforts and an action plan to halt UCB failures, apart from fully securing the deposits through the DICGC scheme which limits compensation to only ₹5 lakh. **Hajira Magal** Hajira Village, Karnataka

**Storing RE power** This refers to 'Why renewable energy needs rapid adoption of grid forming inverters' (July 7). The writer has rightly highlighted the need for India to go in for adopting newer technologies in storage of

power produced through renewable energy sources, especially when generation of RE power is constant. Many States like Rajasthan, Gujarat, MP and UP are going in for solar power installations in a big way. However, the RE sector faces multiple operational issues such as less demand from buyers for the power during peak supply season and the lack of required infra in storing the energy produced for a sustained supply in which India lags behind many countries like Australia, Germany and China. Both these issues need to be resolved for a hassle free journey in RE sector. **RV Bankaran** Pune



## Agenda for urban India

Citizens, industry must join hands to create infra

Chandrajit Banerjee

India is undergoing a historic urban transformation. With a projected urban population of 675 million by 2035 and over 70 million new residents expected in our cities by 2045, this transition will define the trajectory of our economic and social development for decades to come. The question is no longer whether India will urbanise — it is how effectively we can manage, leverage, and lead this urban shift to drive national competitiveness.

Cities are more than population centres — they are engines of growth, innovation, and opportunity. Urban infrastructure — transport systems, logistics hubs, housing, energy, sanitation, and waste management — is the hardware of economic efficiency. Despite various reform efforts, India's urban systems remain under serious stress. Congestion, water scarcity, unmanaged solid waste, inadequate sanitation, poor logistics integration, and weak municipal finances continue to undermine the promise of urbanisation. These issues are not only civic — they are deeply economic. According to the Asian Development Bank, India loses up to \$22 billion annually due to urban transport inefficiencies, logistics delays, and poor infrastructure. These are direct hits to industrial productivity and the ease of doing business.

To remain globally competitive and inclusive domestically, India must now adopt a bold and integrated urban reform agenda — one that is systemic, scalable, and sustainable.

### SIX REFORMS

First, urban infrastructure must be treated as core national infrastructure. Just as ports, roads, and energy grids have been prioritised, urban assets — particularly in mobility, waste management, and water systems — must be elevated within national planning frameworks.

Second, urban expansion must be synchronised with industrial corridors. A spatially integrated model — combining regional transit, zoning, and economic planning — can foster compact, productive, and liveable urban-industrial zones.

Third, India must urgently create unified, tech-enabled urban governance bodies. These bodies should not only streamline planning and approvals but also embed private sector leadership from day one. Industry must have a seat at the table — not just as a



CITIES. Infra focus is imperative

stakeholder, but as a co-owner of solutions. These institutions should jointly manage real-time performance dashboards, urban digital twins, and feedback loops that improve accountability.

A powerful precedent comes from the Bangalore Agenda Task Force, where civic leaders, citizens, and industry co-created solutions — from door-to-door waste collection to digitised public services. The key was not just partnership — but shared ownership of outcomes.

Fourth, sanitation and waste management must be treated as national economic priorities. The private sector is already demonstrating what's possible. The Tirupur water PPP, for example, used a BCOF model to sustainably deliver water to both industrial and residential users. Such models — where industry leads design, delivery, and risk-sharing — can now be expanded to waste processing, circular economy models, and decentralized sanitation infrastructure.

Fifth, PPPs must be recast for today's urban reality. With de-risking instruments like viability gap funding and urban challenge funds, we can crowd in long-term private capital for both brownfield upgrades and greenfield transformation.

Sixth, industry must co-develop the digital backbone of modern cities. From AI-powered infrastructure planning to automated construction permits, digital public goods can dramatically improve efficiency and transparency.

Finally, urban reforms must be co-created with citizens and industry alike. Participatory frameworks that blend policy, people, and private capital will give cities the resilience and legitimacy they need to thrive. India's urban moment is here. The reforms we undertake now will determine whether our cities become barriers or bridges to national progress.

The writer is Director General, CI

# Vietnam opens the door for Trump

Vietnam's last minute trade deal with the US may deliver some benefits to the US, but could prove adverse for Vietnam

MACROSCAN.



CP CHANDRASHEKHAR, JAYATI GHOSH

In early July, US President Donald Trump announced that he had signed a trade agreement with Vietnam, days before the July 9 end to his pause on the policy of imposing differential and illogically graded punitive tariffs on all trading partners. Those "reciprocal" and additional tariffs were magnanimously paused for three months, pending negotiations on trade deals that were expected to initiate measures that reduced all, and especially the most egregious, of bilateral trade deficits of the US.

The deal with Vietnam is still only the second such agreement. The first, with the UK, was by no means significant from the point of view of either US or global trade. But the second, with Vietnam, is a victory for Trump for many reasons.

To start with, Vietnam, a much smaller country than the US, has agreed to reduce tariffs on its imports from the US to zero, further opening up its markets in areas such as agriculture where domestic producers are likely to be adversely affected.

Second, in return for this, the Trump administration has only promised to reduce tariffs on goods produced in and exported from Vietnam to a still high 20 per cent, as compared to the 46 per cent tariff threat held out on "Liberation day" when variable 'reciprocal' tariffs and other imports were slapped on each one of the US' trade partners.

### 'TRANSHIPPED' GOODS

Third, what is striking is that Vietnam has also agreed as part of the "deal" to a 40 per cent tariff on goods "transhipped" through the country and exported to the US. Though the term transhipped has not been clearly defined as yet, it obviously does not refer just to "re-exports", or goods produced elsewhere that pass through Vietnam before entering the US, but must be a reference to goods produced or assembled in Vietnam using some as yet unspecified proportion of inputs from outside the country. That needs to be clarified, and in any case is difficult to define.

Given the way in which Vietnam is plugged into global value chains, this would account for a large part of its exports to the US. Imported inputs and components enter not only more modern sectors like computers and electronic products, machinery, and telephones (the first, second and fourth largest category of goods exported from

Given Vietnam's position in global production chains, the tariffs on goods produced in the country as well as those transhipped are likely to be damaging

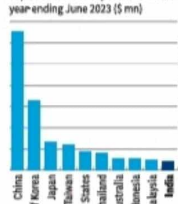
### Export profile

Top 10 exports from Vietnam over year ending June 2023 (\$ mn)

Computers, electrical products and components thereof	25,587
Telephones, mobile phones and parts thereof	24,200
Machine, equipment, tools and instruments	19,700
Textiles and garments	15,730
Footwear	9,822
Other products	7,652
Other means of transportation, parts and accessories thereof	6,675
Wood and wooden products	6,057
Iron and steel	4,258
Fishery products	4,146

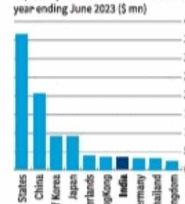
### Import sources

Top 10 sources of imports into Vietnam year ending June 2023 (\$ mn)



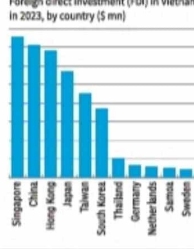
### Export destinations

Top 10 export destinations for Vietnam year ending June 2023 (\$ mn)



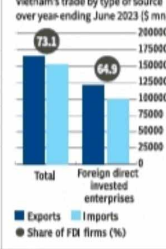
### Foreign investment

Foreign direct investment (FDI) in Vietnam in 2023, by country (\$ mn)



### Trade profile

Vietnam's trade by type of source over year ending June 2023 (\$ mn)



Source: General Department of Customs, Vietnam; National Statistical Organisation, Vietnam

Vietnam to the US — Chart 1), for which Vietnam has emerged as an important global assembly point, but also traditional manufacturing areas like textiles and footwear, with imports of fabrics and processed leather. These imports are sourced from countries as diverse as China, South Korea, Japan, Taiwan, and even the US (Chart 2).

With imports from these sources processed or assembled in Vietnam, the resulting output is overwhelmingly exported to the US and China, with South Korea and Japan also being important, but far less significant, markets for the country (Chart 3). Clearly, Vietnam's role in production

chains is to serve as the final finishing point in global trade platforms involving multiple countries.

In this relationship, the US is a much more important export destination than China, with the latter accounting for less than 60 per cent of the market the US provides Vietnam. Since the US is a far less important source of its imports than China, Vietnam notched up a trade surplus with the US (\$32 billion year ending June 2023) and a deficit with China (\$12 billion).

Firms from most of the countries that had close trading relations with Vietnam, saw it as a low-cost production location with an environment suited to a

strategy of relocation. As a result, foreign direct investment flows from these countries to Vietnam tended to be high (Chart 4). China, together with Hong Kong SAR, took the lead in foreign direct investment, followed by Singapore.

Note that these countries could have been only the proximate source but not actual nationality (or home country) of the firms engaging in this FDI. Singapore was followed by Japan, Taiwan and South Korea. These countries were using Vietnam as an export platform, with exports directed substantially to the US, which was a relatively small source of FDI. This role of Vietnam is also corroborated by the evidence that foreign direct invested enterprises accounted for 73 per cent of Vietnam's goods exports and 65 per cent of its goods imports (Chart 5).

**NEGATIVE IMPACT** Given this position of Vietnam in global production chains, both the 20 per cent tariff on goods largely produced within that country and exported to the US, and the 40 per cent tariff on the goods transhipped through it are likely to be damaging, since low margins make it difficult to absorb these tariffs into costs without affecting prices. Devaluation of Vietnam's currency to lower dollar prices and neutralise tariff increases would also be damaging. If devaluation is to be effective in achieving this, money earnings must be reined in to prevent the increase in the costs of imports triggering equivalent all-round inflation, compressing demand and growth.

It is true that the US too would be affected, because Vietnam is the sixth largest import source for the US. The tariffs would raise prices in the US and add to the inflationary consequences of higher tariffs on other countries. But there are other likely benefits for the US from the deal. The first is the effect that the high transshipment trade tariffs would have on the use of countries like Vietnam as low-cost production or assembly bases for exports to the US. That would set limits on countries like China using relocation to Vietnam as a means to export to the US, circumventing any direct curbs on their exports to the US. This may encourage some shift of manufacturing back to the US.

More importantly, however, the agreement with Vietnam would establish a template for deals with other countries, which, if they fail to accept a similar deal in the near future, would be forced into doing so by being slapped with tariffs of 40 per cent or even more on their exports to the US. The consequent all round exports to the US from its trading partners may have a salutary effect on US growth after a bout of inflation.

Only time will tell how significant that outcome would be or whether it would be subverted by collateral processes it unleashes. But the deal, though only the second agreement which the US has been able to seal as July 9 approaches, would definitely be damaging for many of the US's trading partners, including Vietnam.

thehindubusinessline.

TWENTY YEARS AGO TODAY.

July 8, 2005

### London blasts rock markets

The stock markets took a tumble on Thursday as panic about the implications of the blast in London set in. The markets opened weak on a note of correction and rising crude oil prices, but by 2 p.m., when news of a series of blasts in London underground trains trickled in, some panic selling led to a near 2 per cent loss in the benchmark indices. The Sensex shed 142.47 points to close at 7,145.13.

### P&G Hygiene to hive off detergent facility in M.P.

Procter and Gamble Hygiene and Health Care Ltd (PGHH) today announced that it was considering hiving off its detergent manufacturing facility in Madhya Pradesh. In a notice to the BSE, the listed entity of the Procter and Gamble Group said its board of directors was slated to meet on July 11 to consider transfer, by way of sale or otherwise, of its detergent manufacturing business.

### Nicholas to pick 17 pc stake in Canadian biotech co

Nicholas Piramal India has said that it would be picking 17.1 per cent stake in Canadian biotech company Biotech Syntech Inc. NPI will fork out about Rs 23 crore towards this equity participation, a pharma industry representative said.

## BRICS demand wealthy nations fund climate transition

Reuters

Leaders of the BRICS group of developing nations prepared to address the shared challenges of climate change on Monday, the final day of their summit in Rio de Janeiro, demanding that wealthy nations fund global mitigation of greenhouse emissions.

Brazilian President Luiz Inacio Lula da Silva has touted the importance of

the Global South in tackling global warming as he prepares to host the United Nations climate summit in November.

Still, a joint statement from BRICS leaders released on Sunday argued that fossil fuels will continue to play an important role in the global energy mix, particularly in developing economies.

"We live in a moment of many contradictions in the whole world.

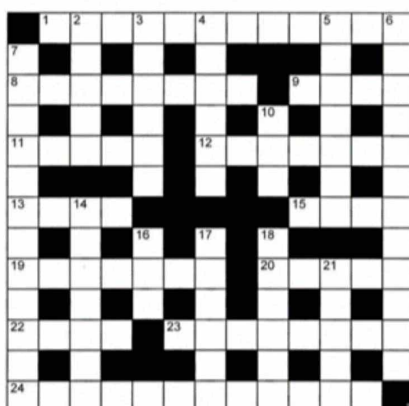
The important thing is that we are willing to overcome these contradictions," Brazil's Environment Minister Marina Silva said, when asked about the plans to extract oil off the coast of the Amazon rainforest.

In their joint statement, BRICS leaders underscored that providing climate finance "is a responsibility of developed countries towards developing countries," which is the

standard position for emerging economies in global negotiations.

Their declaration also mentioned the group's support for a fund that Brazil proposed to protect endangered forests — the Tropical Forests Forever Facility — as a way for emerging economies to fund climate change mitigation beyond the mandatory requirements imposed on wealthy nations by the 2015 Paris Agreement.

## BL TWO-WAY CROSSWORD 2734



### EASY

#### ACROSS

- Financial reward (12)
- Leave the throne (8)
- To top the bill (4)
- Evade (5)
- Huge, vast (7)
- Listening organs (4)
- Continent (4)
- Giving gratuities (7)
- Trick of doing something (5)
- Prepare food (4)
- One steering craft (8)
- Secure, unharmed (4,3,5)

#### DOWN

- Concluded (5)
- Pawnbrokers' (6)
- Bring on as consequence (6)
- Means (7)
- Highly stressful, emotionally (5,7)
- Scoones (12)
- Little devil (3)
- A telling-off (7)
- To immerse (3)
- Settled (6)
- Hands on hips, elbows out (6)
- Ram-headed god of Ancient Egypt (5)

### NOT SO EASY

#### ACROSS

- Nature more in need of change if there's to be reward (12)
- Stop ruling, slacken off and hold detectives back (8)
- Printed mark that has its points to head the bill (4)
- A useful contrivance, to get out of the way (5)
- Huge mines worked out around the Middle East (7)
- Lugs some really awkward early starters back (4)
- With a land mass, is backed in America first and last (4)
- Is giving a fancied runner about to fall? (7)
- Trick of execution to know as deck appears in halves (5)
- Be at the range when company gets approval (4)
- Men lash out about motorway when he's steering (8)
- In sand, unending fear will make a noise if unharmed (4,3,5)

#### DOWN

- In conclusion, is half-dead and could not go on (5)
- Family men are those who take pledges (6)
- Thanks to being in the line-up, bring it on as consequence (6)
- Means to be at home and look after sheep initially (7)
- Never-changing, drawing it off from leas is distressful (5,7)
- Light holders that misled Nick's cast (12)
- Mischievous child puts one on the map, which is heartless (3)
- Rebuke that is concerned with trial print (7)
- A pickpocket I'd sent up to Peruvian capital (3)
- Said one would be a mouthpiece, accepting silver first (6)
- With hands on hips a Kipling character is not quite a boy (6)
- Ammunition shortly to be given to North Egyptian deity (5)

### SOLUTION: BL TWO-WAY CROSSWORD 2733

ACROSS 1. Brutal B. Chime 9. Designs 11. Epaullets 12. Psalm 15. Dawn 16. Pig 17. Amen 19. Burnt 21. Landlady 24. Setback 25. Flood 26. Reeled  
DOWN 2. Reeds 3. Trilling 4. Lone 5. Scout 6. Mine 7. Fees 10. Spaniards 12. Pads 13. Valuable 14. Knot 18. Glide 20. Nacre 21. Lift 22. Nook 23. Year



# 250 years of American democracy and the machinery of power

The US democracy sold as pure, moral and unprecedented is increasingly under lens. Behind the facade of democratic virtue lies a history of conquest, slavery and imperialism; carefully constructed narratives masking brutal truths for 250 years are now crumbling

FIRST Column

We have been deceived — again and again — into believing that US democracy was born as a noble product of collective will. The story handed down to us is that George Washington, in a moment of virtuous restraint, rejected Colonel Lewis Nicola's suggestion to crown him king, choosing instead the path of liberty and republicanism. This moment is celebrated as the moral genesis of American democracy. But 250 years on, the illusion fractures under the weight of historical reality.

What has been marketed to the world as democracy is, in fact, a meticulously engineered architecture of power: elitist at home, imperial abroad. The so-called "rules-based order" championed by American diplomats is not a codified universalism — it is an ideological cudgel wielded only when convenient, a system of selective legality designed to mask naked geopolitical aggression.

America's origin myth is steeped not in egalitarianism but in extermination, slavery, and expansionism. The Declaration of Independence, crafted by men who themselves owned human beings, is less a document of freedom than a philosophical smokescreen. The economic engine of the new republic ran on the backs of enslaved Africans — auctioned, whipped, raped, and bred like livestock. The foundational wealth of the United States was extracted not merely through commerce or innovation, but through racialised brutality institutionalised as law.

Simultaneously, Indigenous nations were decimated by policies so ferocious they now fall under the ambit of genocide. The Trail of Tears, initiated under Andrew Jackson, led to the deaths of thousands during forced removals. The Sand Creek Massacre (1864), the Bear River Massacre (1863), and the slaughter at Wounded Knee (1890) are but a few unambiguous testaments to settler — colonial annihilation. These were not chaotic by-products of war — they were methodical acts of ethnic cleansing, carried out under Government authority. The Indian Boarding Schools, operating well into the 20th century, functioned as laboratories of cultural erasure. Native children were stolen from their families, stripped of language and identity, and subjected to systematic abuse. Many perished. Their bodies remain buried, literally and metaphorically, in the margins of American history books.

Slavery's formal abolition was a bait-and-switch. The 13th Amendment, often cited as a moral landmark, explicitly permits involuntary servitude "as punishment for crime." This clause birthed the carceral levitation that now holds more than two million people — disproportionately Black and Brown — in cages. Chain gangs were simply replaced by prison labour. Jim Crow laws mandated into mass incarceration. The US, in the land of its supposed origin, has become operationalised as an instrument of racial management.

Beyond its borders, the United States has imposed its will through fire and steel. Since the



mid-20th century, over 800 American military bases have metastasised across the globe — encircling rivals, destabilising regions, and foreclosing sovereign futures. The map of US bombings reads like a grim eulogy for the postcolonial world: Hiroshima and Nagasaki (1945), Korea (1950-53), Vietnam, Laos, and Cambodia (1964-75), Grenada (1983), Panama (1989), Iraq (1991, 2003), Yugoslavia (1999), Afghanistan (2001-2021), Libya (2011), Syria, Yemen, Somalia, Pakistan — the list is encyclopaedic, the outcomes catastrophic.

These assaults were not aberrations. They are the sinews of US foreign policy. Civilian casualties, mass displacement, decimated infrastructure — these are collateral sacrifices at the altar of American primacy. The 2003 invasion of Iraq, launched under the pretext of non-existent weapons of mass destruction, killed hundreds of thousands

NILANTHA ILANGAMUWA

American primacy. The 2003 invasion of Iraq, launched under the pretext of non-existent weapons of mass destruction, killed hundreds of thousands

AMERICA'S ORIGIN MYTH IS STEEPED NOT IN EGALITARIANISM BUT IN EXTERMINATION, SLAVERY, AND EXPANSIONISM. THE DECLARATION OF INDEPENDENCE, CRAFTED BY MEN WHO THEMSELVES OWNED HUMAN BEINGS, IS LESS A DOCUMENT OF FREEDOM THAN A PHILOSOPHICAL SMOKESCREEN

and unravelled an entire region. It was not just a war crime; it was an act of ontological vandalism.

Meanwhile, the CIA functioned as the state's clandestine sword arm — executing assassinations, staging coups, and manipulating foreign Governments with pathological impunity. Operation Ajax in Iran (1953), the assassination of Patrice Lumumba in Congo (1961), the orchestration of Chile's 1973 coup and Salvador Allende's death, the slaughter following Suharto's rise in Indonesia — these are not Cold War footnotes. They are the operational grammar of empire. From Latin America's death squads to Africa's proxy militias, the US exported death in the name of freedom, dissolving democracies while preaching democratic virtue. The facade cracked further on 22 June 2025, when the US military launched the airstrikes on alleged Iranian nuclear sites. Again, no Senate approval. Again, no UN mandate. No evidence presented, no imminent threat substantiated. Just premeditated violence delivered from above, wrapped in the rhetoric of preemption.

These violations are not the exceptions — they are the doctrine. They expose the hollow core of the "rules-based international order" that American officials regurgitate at every diplomatic summit.

Where were the rules when the International Atomic Energy Agency's findings were ignored? When do civilians become uncounted corpses? Sovereignty is sacred — until it obstructs US interests. Legality is upheld — until it isn't. Morality is espoused — until it becomes inconvenient.

Antonio Gramsci's concept of cultural hegemony is not an abstraction here. American dominance is sustained not only through bombs and bases but through narrative. The cinematic heroism of soldiers, the pageantry of the 4th of July, the mythologising of the Founding Fathers — all cultivate acquiescence. This is not democracy; it is imperial pedagogy. History is sculpted to erase Indigenous resistance, to sanitise slave rebellions, to omit the bloodied cost of expansion. Power survives by shaping memory.

Domestically, this hegemony manifests as a fortified police state. Urban policing is militarised, racialised, and terminally unaccountable. Surveillance pervades every digital crevice. Billionaires underwrite elections while voters are purged from the rolls.

Meanwhile, whistleblowers like Chelsea Manning and Edward Snowden are criminalised for revealing the very duplicities on which the system runs. Justice is rationed. Dissent is criminalised. The machinery of control is bipartisan. And yet, resistance grows quieter when comfort replaces conviction. US policymakers have long perfected a dual strategy: attracting the brightest minds from other nations through the front door with scholarships and opportunity, while welcoming corrupt elites through the back door, bringing with them vast stolen wealth. This was not a coincidence; it was policy. Intellectual capital is harvested, while accountability is outsource. Those who manage to benefit — regardless of where they come from — often learn to stay silent. Silence becomes the currency of survival.

Meanwhile, American officials, often standing in nations hollowed out by these very dynamics, deliver polished speeches about anti-corruption and a "rules-based order." It is disarming to witness a person speak of justice while actively undermining it, to see a smile accompany the quiet betrayal of their conscience. At 250 years, the United States is not an enlightened republic; it is a paradox on the verge of collapse. It exhorts others to uphold international law while treating treaties as toilet paper. It funds brutal regimes while sermonising about human rights. It cloaks militarism in democracy and calls it liberation.

To participate in this pageantry is to be complicit. To swallow the official myths is to ingest poison disguised as principle. American democracy, if it is to mean anything, must be exhumed, dismantled, and reimagined — not venerated as sacred scripture, but interrogated as a living contradiction.

(The writer is Colombo based journalist and columnist. Views are personal)

## Air India crash sparks safety, insurance, and policy overhaul

BY JERA KHAN

The Air India Flight 171 crash, which claimed over 240 lives in Ahmedabad, has triggered a major overhaul in India's aviation, insurance, and safety policies. With insurance claims expected to reach US\$475 million, the tragedy has spotlighted gaps in airline liability, compensation norms under the Montreal Convention, and the role of global reinsurers.

As the Tata Group and insurers expedite relief and settlements, the disaster underscores the need for stronger compliance, transparent investigations, and long-term safety reforms to restore public trust in Indian aviation.

The Indian aviation industry is facing a crisis of confidence after the catastrophic crash of Air India's Boeing 787-8 Dreamliner, which claimed the lives of all except one passenger in Ahmedabad on June 12, 2025. The Air India 171 flight took over 240 lives, including several on the ground.

Despite being statistically rare, aviation accidents evoke intense public fear and scrutiny because of their catastrophic nature, high fatality rates, and dramatic media coverage. Unlike car crashes, which happen frequently and individually, a single plane crash often results in the loss of hundreds of lives at once, amplifying its emotional and psychological impact. Air travel also symbolises technological mastery and safety, so when failures occur, they shake public trust not just in airlines, but in regulators, manufacturers, and human judgment. The suddenness, scale, and helplessness associated with such tragedies make them resonate deeply, prompting calls for accountability and systemic reform.

Since its takeover by Tata Sons in 2022 from the government, Air India has been working towards becoming a "world-class" airline, even amidst persistent issues like delayed flights and subpar service standards. But this devastating tragedy has not only eclipsed those efforts but has dealt a severe blow to the airline's credibility and long-term ambitions.

Air India's resources will now be diverted toward addressing the aftermath of the crash — managing insurance claims, identifying the cause, implementing corrective safety measures, and rebuilding its reputation. Tata AIG is the lead insurer, with participation from New India Assurance, ICICI Lombard, and a few public sector companies.

Insurance claims related to the crash are anticipated to reach approximately US\$475 million, covering both the aircraft's hull and engine as well as liability for the loss of lives, according to a report by Bloomberg News. Policybazaar data indicates that Air India's entire fleet is insured for around US\$210 billion, with an annual insurance premium of nearly US\$30 million.

All affected passengers will receive compensation under Air India's insurance cover, and since the flight included people of various nationalities,



the Montreal Convention will guide payouts. India, a signatory since 2009, mandates a minimum compensation of 128,821 Special Drawing Rights (SDRs) — around ₹1.5 crore per victim — regardless of fault. Crucially, the treaty also allows for unlimited liability if negligence is proven.

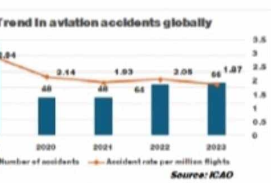
Historically, the process of determining compensation in aviation disasters has been shaped by a combination of international conventions, domestic legal systems, and the unique circumstances surrounding each crash. A notable example is the 2015 Germanwings Flight 9525 tragedy, where the co-pilot deliberately crashed the aircraft, killing all on board. In that case, Lufthansa — the parent airline — offered initial financial assistance to victims' families, but many chose to pursue higher compensation through courts, citing alleged negligence in failing to properly assess the pilot's mental health.

In contrast to the Montreal Convention's provisions, countries still governed by the older Warsaw Convention enforce much lower compensation ceilings (as low as US\$8,300), creating significant disparities across regions. Airlines also tend to offer interim relief to address immediate financial needs.

For instance, Germanwings provided upfront payments of around \$4,000 to each affected family. However, inconsistencies in these practices have led to calls for greater global uniformity. Together, these cases underscore the complex interplay between legal obligations, humanitarian considerations, and reputational management in the aftermath of aviation tragedies — and set an important precedent for how compensation may unfold in the Air India Flight 171 case.

Given the magnitude of potential claims, Indian insurers are unlikely to bear the full risk alone. Reinsurance giants like Lloyd's of London, Swiss Re, and Munich Re are expected to absorb a significant portion of the liabilities, making this a globally shared financial event. As investigations unfold, reinsurers will play a critical role in evaluating Air India's compliance with safety protocols and pilot assessments.

Meanwhile, claim settlements are expected to vary based on several factors, including passenger nationality, travel class, and whether they held individual travel insurance policies. Passengers



with additional personal coverage may receive supplementary payouts beyond the airline's liability. Families of ground victims, including those who lost homes or businesses, will also seek compensation for property damage and loss of livelihood. However, the claims process may be complicated in cases where entire families perished, leaving no immediate next of kin.

In addition to insurance payouts, Tata Group has announced ₹1 crore in compensation for each deceased person's family, including those who died on the ground. The company also stated it would cover medical expenses for those injured and ensure necessary care and support. The crash impacted several people in the Meghali Nagar area near the airport, including doctors, students, hospital staff, and residents.

The insurance industry is navigating an unfamiliar situation — balancing thorough checks with the need for swift, compassionate action. To speed up the process, the Insurance Regulatory and Development Authority of India (IRDAI) issued a circular on June 14 directing insurers to submit weekly claim updates from June 16. It also asked them to appoint nodal officers, waive formalities like FIRs and postmortem reports, and expedite disbursements under life and personal accident policies. As the insurance and legal processes unfold, the crash of Air India Flight 171 is likely to become a reference point for future aviation safety and compensation practices in India. It underscores the pressing need for robust compliance mechanisms, timely audits, and better coordination among insurers, regulators, and airlines.

The tragedy also brings to light the human cost of aviation failures, demanding not just financial settlements but also policy reforms that prioritise preventive measures. For Indian aviation to restore public confidence, it must now focus on transparent investigations, survivor support, and long-term safety investments. Whether through fair compensation, regulatory accountability, or global insurance cooperation, the collective response to this disaster will shape the future trajectory of India's aviation sector.

(The writer is Business Correspondent at India Business & Trade. Views are personal)

## How an ancient Indian path became a global movement

Yoga, an ancient practice rooted in the spiritual and philosophical traditions of India, has long transcended its geographical and cultural origins. Though born in the Indian subcontinent thousands of years ago, yoga today is a global phenomenon — practiced from the skyscrapers of New York to the deserts of Dubai, from Berlin's wellness studios to Japanese Zen gardens. This global embrace reflects more than just a fad; it signifies a deeper, growing understanding of yoga's essence as a holistic path to self-awareness, health, and spiritual balance. Yoga traces its origins to northern India more than 5,000 years ago. The earliest mention of the word "yoga" appears in the Rig Veda. But yoga was never meant to be confined to a region. The West encountered yoga during the late 19th and early 20th centuries, initially as an esoteric philosophical practice. Swami Vivekananda's speech at the Parliament of World Religions in Chicago in 1893 was among the earliest sparks that ignited Western curiosity. But it was only in the mid-20th century that yoga truly began to spread in the West, thanks to several pivotal Indian yogis.

One of the most influential figures was Swami Vishnudevananda, a direct disciple of Swami Sivananda, the founder of Sivananda Yoga. Born in Kerala, Swami Vishnudevananda was tasked by his guru to bring the knowledge of yoga to the West. In 1957, he travelled to North America and founded the International Sivananda Yoga Vedanta Centres.

Swami Vishnudevananda's approach was holistic. He emphasised the "Five Points of Yoga": proper exercise, proper breathing, proper relaxation, proper diet, and positive thinking with meditation. These principles formed the bedrock of the Sivananda tradition. He didn't merely transplant yoga as a fitness regime but presented it as a complete lifestyle. He also became known as a peace ambassador, famously flying over war zones in a small plane painted with the word "OM", dropping leaflets promoting peace. His mission embodied the core spirit of yoga: unity, peace, and spiritual awakening. While Swami Vishnudevananda spread classical yoga, Maharishi Mahesh Yogi introduced Transcendental Meditation (TM) in the 1960s, bringing a simplified and accessible form of yoga meditation to the West. TM attracted global attention when The Beatles and other celebrities became his followers.

This initiated a trend where yoga and meditation were not only health tools but also became fashionable symbols of spiritual exploration. In the 1970s, Bikram Choudhury introduced Bikram Yoga, a heated, high-intensity series of 26 postures. His brand of yoga gained rapid popularity, especially in the United States. It reflected the West's initial fascination with yoga's physical benefits, flexibility, strength, and detoxification, often sidelining its deeper spiritual com-

ponents. Initially, yoga in the West was heavily skewed toward physical postures (asanas), often practiced in gyms and health clubs. However, with increasing exposure and maturity, many practitioners began exploring its subtler dimensions: breath control (pranayama), meditation (dhyana), ethical living (yamas and niyamas), and self-inquiry.

Mindfulness, now a buzzword in wellness circles, is deeply rooted in yogic and meditative practices. Concepts like ahimsa (non-violence) and santosha (contentment) began finding resonance in the personal growth movements. Yoga gradually reclaimed its identity as not just a tool for physical fitness, but as a transformative path toward mental clarity and spiritual awakening.

A turning point in yoga's global journey came in 2014, when Prime Minister Narendra Modi proposed the idea of an International Day of Yoga at the United Nations General Assembly. In his speech, Modi described yoga as "India's invaluable gift to the world", emphasising its role in fostering unity between mind and body, man and nature. The proposal received overwhelming support from 177 countries, the highest number of co-sponsors ever for a UN resolution. On June 21, the summer solstice and the longest day of the year in the Northern Hemisphere, was declared International Yoga Day. Since 2015, millions across continents have participated in mass yoga sessions every year, a global testament to its universal appeal. Surprisingly to some, yoga is now making steady inroads into regions traditionally seen as culturally distant from its roots. In the Middle East and the Arab world, yoga is increasingly practiced not only in private studios but also publicly and even officially endorsed in some countries. Governments in the UAE and Saudi Arabia have supported yoga for its health benefits. In 2021, Saudi Arabia officially recognised yoga as a sports activity, and it is now part of wellness programs in schools and workplaces.

Women in these regions are also taking to yoga in large numbers, seeing it as both empowering and spiritually enriching. The West is also actively experimenting with yoga, often blending it with other practices. From yoga with weights to aerial yoga, from goat yoga to VR-assisted meditation, the creativity seems boundless. While some purists criticise this dilution, others argue it's part of yoga's organic evolution, much like how Indian martial art niyudh (barehanded combat) evolved into kung fu in China and karate in Japan. Just as India's ancient martial systems found expression in new forms across Asia, yoga too is likely to evolve further in the West, spawning new schools, philosophies and applications, perhaps some yet unimaginable today.

(The writer is certified Sivananda Yoga teacher with over 30 years of practice. Views are personal)



SHARMILA DAS



# BRICS condemns tariff hikes amid Middle East tensions

ASSOCIATED PRESS  
Rio de Janeiro

The BRICS bloc of developing nations on Sunday condemned the increase of tariffs and attacks on Iran, but refrained from naming US President Donald Trump.

The group's declaration, which also took aim at Israel's military actions in the Middle East, also spared its member Russia from criticism and mentioned war-torn Ukraine just once.

The two-day summit was marked by the absence of two of its most powerful members. China's President Xi Jinping did not attend a BRICS summit for the first time since he became his country's leader in 2012. Russian President Vladimir Putin, who spoke via videoconference, continues to mostly avoid traveling abroad due to an international arrest warrant issued after Russia invaded Ukraine. In an indirect swipe at the US, the group's declaration raised "serious concerns" about the rise of tariffs which it said were "inconsistent with WTO (World Trade Organisation) rules". The BRICS added that those restrictions "threaten to

reduce global trade, disrupt global supply chains, and introduce uncertainty."

Trump, in a post on his social media platform late Sunday, said any country that aligns itself with what he termed "the Anti-American policies of BRICS" would be levied an added 10 per cent tariff.

Brazil's President Luiz Inacio Lula da Silva, who hosted the summit, criticised NATO's decision to hike military spending by 5 per cent of GDP annually by 2035. That of GDP was later echoed in the group's declaration. "It is always easier to invest in war than in peace," Lula said at the opening of the summit, which is scheduled to continue on Monday.

Iranian President Masoud Pezeshkian, who was expected to attend the summit before the attacks on his country in June, sent his foreign minister Abbas Araghchi to the meeting in Rio.

The group's declaration criticised the attacks on Iran with out mentioning the US or Israel, the two nations that conducted them.

In his speech, Araghchi told leaders he had pushed for every member of the United Nations to condemn Israel strongly. He



India's Prime Minister Narendra Modi and Brazilian President Luiz Inacio Lula da Silva attend the 17th annual BRICS summit in Rio de Janeiro

added Israel and the US should be accountable for rights violations. The Iranian foreign minister said the aftermath of the war "will not be limited" to one country.

"The entire region and beyond will be damaged," Araghchi said.

BRICS leaders expressed "grave concern" for the humanitarian situation in Gaza, called

for the release of all hostages, a return to the negotiating table and reaffirmed their commitment to the two-state solution.

Later, Iran's Araghchi said in a separate statement on messaging app Telegram that his government had expressed its reservation regarding a two-state solution in a note, saying it will not work "just as it has not worked in the past."

Also on Telegram, Russia's foreign ministry in another statement named the US. And Israel, and condemned the "unprovoked military strikes" against Iran.

The group's 31-page declaration mentions Ukraine just once, while condemning "in the strongest terms" recent Ukrainian attacks on Russia.

"We recall our national posi-

tions concerning the conflict in Ukraine as expressed in the appropriate fora, including the UN Security Council and the UN General Assembly," the group said.

Joao Alfredo Nyegey, an international business and geopolitics professor at the Pontifical Catholic University in Parana, said the summit could have played a role in showing an alternative to an unstable world, but won't do so.

"The withdrawal of Egypt's President Abdel Fattah el-Sisi and the uncertainty about the level of representation for countries like Iran, Saudi Arabia and the UAE are confirming the difficulty for the BRICS to establish themselves as a cohesive pole of global leadership," Nyegey said. "This moment demands high level articulation, but we are actually seeing dispersion" while Lula advocated on Sunday for the reform of Western-led global institutions, Brazil aimed to avoid becoming the target of higher tariffs.

Trump has threatened to impose 100 per cent tariffs against the bloc if they take any moves to weaken the dollar. Last year, at the summit hosted by Russia in Kazan, the Kremlin sought to develop

alternatives to US-dominated payment systems which would allow it to dodge Western sanctions imposed after Russia's invasion of Ukraine in February 2022.

Brazil decided to focus on less controversial issues in the summit, such as promoting trade relations between members and global health, after Trump returned to the White House, said Ana Garcia, a professor at the Rio de Janeiro Federal Rural University.

"Brazil wants the least amount of damage possible and to avoid drawing the attention of the Trump administration to prevent any type of risk to the Brazilian economy," Garcia said. BRICS was founded by Brazil, Russia, India, China and South Africa, but the group last year expanded to include Indonesia, Iran, Egypt, Ethiopia, and the United Arab Emirates.

As well as new members, the bloc has 10 strategic partner countries, a category created at last year's summit that includes Belarus, Cuba and Vietnam.

That rapid expansion led Brazil to push housekeeping issues - officially termed institutional development - on the agenda to better integrate new

members and boost internal cohesion.

Despite notable absences, the summit is important for attendees, especially in the context of instability provoked by Trump's tariff wars, said Bruce Scheidl, a researcher at the University of Sao Paulo's BRICS study group. "The summit offers the best opportunity for emerging countries to respond, in the sense of seeking alternatives and diversifying their economic partnerships," Scheidl said.

Earlier on Sunday, a pro-Israel non-profit placed dozens of rainbow flags on Ipanema beach to protest Iran's policies regarding LGBT+ people.

On Saturday, human rights group Amnesty International protested Brazil's plans for offshore oil drilling near the mouth of the Amazon River. For Lula, the summit is a welcome pause from a difficult domestic scenario, marked by a drop in popularity and conflict with Congress. The meeting was an opportunity to advance climate negotiations and commitments on protecting the environment before November's COP 30 climate talks in the Amazonian city of Belem.



## Trump calls Elon Musk's new party plan 'ridiculous'

PRESS TRUST OF INDIA  
New York

US President Donald Trump slammed Elon Musk after he formed a new political party, terming the move as "ridiculous" and saying the tech billionaire is a "top dog" completely off the rails.

Musk, Trump's one-time ally, said in a post on X Saturday that he had set up the "American Party" to compete against the Republican and Democratic parties.

"I think it's ridiculous to start a third party," said Trump, speaking to reporters on Sunday before boarding Air Force One. "It's always been a two-party system, and I think starting a third party just adds to the confusion."

In a post on his social media platform, Truth Social,

Trump said, "I am saddened to watch Elon Musk go completely off the rails, essentially becoming a TRAIN WRECK over the past five weeks."

Musk even wants to start a third political party despite the fact that they have never succeeded in the United States, the US President said.

"The one thing Third Parties are good for is the creation of Complete and Total DISRUPTION & CHAOS," Trump added.

He claimed that the Tesla CEO was motivated by discontent over his plan to end subsidies to promote the purchase of electric vehicles.

Trump also accused Musk of seeking improper influence by asking him to nominate his friend, Jared Isaacman, to be NASA admin-

istrator. After Musk left his role as a special government employee in the Trump administration, Isaacman's nomination was also withdrawn.

"I also thought it inappropriate that a very close friend of Elon, who was in the Space Business, run NASA, when NASA is such a big part of the US corporate life," Trump wrote.

Musk, the largest individual donor to Trump's 2024 presidential campaign, was a close adviser to Trump until recently.

Musk, who spearheaded the Trump administration's push to cut government waste, had criticised Trump's "big beautiful" tax and spending bill because of estimates that it would add trillions of dollars to the federal deficit.

But as they meet for the third time this year, the outwardly triumphant visit will be dogged by Israel's 21-month war against Hamas in Gaza and questions over how hard Trump will push for an end to the conflict.

Trump has made clear that following the 12-day war between Israel and Iran, he would like to see the Gaza conflict end soon. The meeting between Trump and Netanyahu could give new urgency to a US ceasefire proposal being discussed by Israel and Hamas, but whether it leads to a deal that ends the war is unclear.

"The optics will be very positive," said Michael Oren, a former Israeli ambassador to Washington. "But behind the victory lap are going to be some very serious questions."

Before departing for Washington on Sunday, Netanyahu praised the cooperation with the US for bringing a "huge victory over our shared enemy." He struck a positive note on a ceasefire for Gaza, saying he was working "to achieve the deal under discussion, on the terms we agreed to."

"I think that the discussion with President Trump can certainly

help advance that result, which is all of us hope for," Netanyahu said.

Israel and Hamas appear to be inching toward a new ceasefire agreement that would bring about a 60-day pause in the fighting, send aid flooding into Gaza and free at least some of the remaining 50 hostages held in the territory.

But a perennial sticking point is whether the ceasefire will end

the war altogether. Hamas has said it is willing to free all the hostages in exchange for an end to the war and a full Israeli withdrawal from Gaza. Netanyahu says the war will end once Hamas surrenders, disarm and goes into exile - something it refuses to do.

Trump has made it clear that he wants to be known as a peacemaker. He has repeatedly trumpeted recent peace deals

when they began their attacks in the Red Sea corridor over the Israel-Hamas war.

"Houthi forces installed a radar system on the ship and have been using it to track vessels in the international maritime area to facilitate further terrorist activities," the Israeli military said.

The Bahamas-flagged Galaxy Leader was affiliated with an Israeli billionaire. It said no Israelis were on board. The ship had been operated by a Japanese firm NYK Line.

The Houthis acknowledged the strikes, but offered no damage assessment from the attack. Their military spokesman, Brig. Gen. Yahya Saeed, claimed its air defense forces "effectively confronted" the Israeli aircraft without offering evidence. Israel has repeatedly attacked Houthi bases in Yemen, including a naval strike in June. Both Israel and the United States have struck ports in the area in the past - including an American attack that killed 74 in April - but Israel is now acting alone in attacking the rebels as they continue to fire missiles at Israel.

isolation and made any resolution to the broader conflict between Israel and the Palestinians more distant than ever.

But the precise details of the deal, and whether it can lead to an end to the war, are still in flux. In the days before Netanyahu's visit, Trump seemed to downplay the chances for a breakthrough.

Asked on Friday how confident he was a ceasefire deal would come together, Trump told reporters: "I'm very optimistic - but you know, look, it changes from day to day."

On Sunday evening, he seemed to narrow his expectation, telling reporters that he thought an agreement related to the remaining hostages would be reached in the coming week.

Those mood swings also have embodied Trump's relationship with Netanyahu.

After Trump's decision to get involved in Israel's war in Iran with strikes on Iranian nuclear sites, the two leaders are more in sync than ever. But that's not always been the case.

As recently as Netanyahu's last visit to Washington in April, the tone was markedly different.

Trump used the photo-op with Netanyahu to announce that the US was entering into negotiations with Iran over its nuclear deal - appearing to clash the Israeli leader off guard and at the time, slamming the brakes on any Israeli military plan.

## Typhoon Danas crosses Taiwan, killing two

ASSOCIATED PRESS  
Taipei

Typhoon Danas brought heavy winds and torrential rains to parts of Taiwan early Monday, killing two people and injuring more than 300 on the island's densely populated west coast.

The typhoon lost intensity and was downgraded to a tropical storm as it moved into the Taiwan Strait on a forecast path to China.

Danas knocked out power for more than 580,000 households, and schools and offices were closed across southern and central parts of Taiwan.

The typhoon made landfall on the west coast late Sunday with maximum sustained winds of 144 kph (89 mph). It dumped more than 60 centimeters (24 inches) of rain in places, causing landslides and flooding.

Two deaths were reported in the southwestern city of Tainan, according to the National Fire Agency. One person died when their vehicle was struck by a falling tree, while another died after his respirator malfunctioned due to losing power.

At least 334 people suffered injuries, while more than 3,400 people were forced to evacuate mostly from mountainous areas around the southern port

city of Kaohsiung.

Thousands of tourists were stranded on Taiwan's outlying islands of Penghu, Matsu and Green due to the cancellations of ferry services and flights.

Areas of southern and eastern Taiwan were hit by heavy rain. The typhoon knocked out power for more than 5,80,000 households and schools while offices were closed across southern and central parts of Taiwan.

ern China made preparations ahead of the storm, which is expected to reach the mainland Tuesday afternoon. Authorities in southern Guangdong province called hundreds of vessels to port and evacuated more than 2,000 people from offshore facilities. Two cities in the eastern Zhejiang province suspended ferry services and construction work.

Danas earlier intensified seasonal monsoon rains in the Philippines' northern mountains, flooding low-lying villages and forcing more than 3,000 people to flee to emergency shelters.

## Risk of further floods in Texas, death tolls tops 80

ASSOCIATED PRESS  
Kerrville (US)

With more rain on the way, the risk of life-threatening flooding was still high in central Texas on Monday even as crews search urgently for the missing following a holiday weekend deluge that killed at least 82 people, including children at summer camps. Officials said the death toll was sure to rise.

Residents of Kerr County began clearing mud and salvaging what they could from their demolished properties as they recounted harrowing escapes from rapidly rising floodwaters late Friday.

Reagan Brown said his parents, in their 80s, managed to escape uphill as water inundated their home in the town of Hunt. When the couple learned that their 92-year-old neighbor was trapped in her attic, they went back and rescued her.

"Then they were able to reach their toolshed up higher ground, and neighbors throughout the early morning began to show up at their toolshed, and they all rode it out together," Brown said.

A few miles away, rescuers maneuvering through challenging terrain filled with

snakes continued their search for the missing, including 10 girls and a counselor from Camp Mystic, an all-girls summer camp that sustained massive damage.

Governor Greg Abbott said 41 people were unaccounted for across the state and more could be missing.

In the Hill Country area, home to several summer camps, searchers have found the bodies of 68 people, including 28 children, Kerr County Sheriff Larry Leitha said.

Ten other deaths were reported in Travis, Burnet, Kendall, Tom Green and Williamson counties, according to local officials.

The Governor warned that additional rounds of heavy rains lasting into Tuesday could produce more dangerous flooding, especially in places already saturated.

Families were allowed to look around the camp beginning Sunday morning.

One girl walked out of a building carrying a large ball. A man whose daughter was rescued from a cabin on the highest point in the camp walked a riverbank, looking in clumps of trees and under big rocks.

One family left with a blue footlocker. A teenage girl had



Families sifted through waterlogged debris on Sunday in central Texas

tears running down her face as they slowly drove away and she gazed through the open window at the wreckage.

Nearby crews operating heavy equipment pulled tree trunks and tangled branches from the river. With each passing hour, the outlook of finding more survivors became even more bleak.

Volunteers and some families of the missing came to the

disaster zone and searched despite being asked not to do so.

Authorities faced growing questions about whether enough warnings were issued in an area long vulnerable to flooding and whether enough preparations were made.

President Donald Trump signed a major disaster declaration Sunday for Kerr County and said he would likely visit

Friday. "I would have done it today, but we'd just be in their way."

"It's a horrible thing that took place, absolutely horrible," he told reporters.

Governor Greg Abbott vowed that authorities will work around the clock and said new areas were being searched as the water receded.

He declared Sunday a day of prayer for the state.

Among those confirmed dead were an 8-year-old girl and a 10-year-old boy from Mountain Brook, Alabama, who was at Camp Mystic, and the director of another camp up the road.

Two school-age sisters from Dallas were missing after their cabin was swept away.

Their parents were staying in a different cabin and were safe, but the girls' grandparents were unaccounted for.



## No Cutting Corners On Compliance Rules

Sebi move on Jane St boosts market integrity

Sebi's recent restrictions on the US proprietary trading firm Jane Street for alleged manipulation will raise the compliance bar without affecting market depth. India is the world's largest derivatives market, particularly the segment where Jane Street is accused of entering into manipulative trades, with robust retail participation. This is typically the environment in which proprietary trading desks operate, and a low tolerance for deviant behaviour will not impact genuine interest. Sebi has been trying to curtail excessive retail speculation in the segment by increasing trading lot sizes and reducing the frequency of contract expiry. Regulatory sensitivity to abnormal trading activity will naturally be high in this scenario, and it extends to market participants operating abroad.

The curbs follow a prior notice to Jane Street about its trading activity and an assurance by the firm of compliance with concerns raised by NSE and Sebi.

The abnormal activity was flagged some time ago, and due process has been followed. Jane Street has legal recourse against the findings, and indications that Sebi could widen its investigation. The signal to other global trading firms expanding in India is that the market is

well-governed and growing at an astonishing pace. Regulators are interested in making the market more efficient without excessive accumulation of speculative froth.

The size of the Indian securities market improves its resistance to manipulation, although the regulatory stance is broadly conservative. This is guided by the recent swing in household savings behaviour in favour of equities. The young age profile of new retail investors warrants some regulatory concerns over pockets of speculative buildup, and it also raises the oversight threshold for manipulative behaviour. Technology-assisted trading poses special risks that need focused oversight. Institutional capacity is being built to oversee securities trading in the age of AI. Indian equities offer foreign investors relative stability in a world that is tearing up the globalisation playbook. The regulatory environment contributes in no small measure to this stability.

## Multilateralism Must Trump US-First Policy

Donald Trump's America-first stance reflects his belief that the US has lost global dominance, and he aims to restore the US to its former glory by ensuring that the world 'respects' the US. On Sunday, Trump injected himself into the summit of the BRICS group of nations in Rio de Janeiro, warning countries that aligning with the 'anti-American' policies of the grouping would attract a 10% tariff. At the summit, BRICS leaders expressed 'serious concerns' about the rise in unilateral tariff and non-tariff measures. Though the US was not mentioned by name, the signals were clear.

Whether it is BRICS, of which the US is not a member, or the Quad, of which it is, what is increasingly clear is that the Trump administration is focused on pursuing an 'America for itself' policy. Washington has hosted two Quad foreign ministers' meetings in the last six months, with a focus on security. There is little doubt that this recalibration is driven by China's ambitions and influence in the Indo-Pacific region. But then, Trump's US is not the poster child for steady ties—consider the renewed engagement with Pakistan. The BRICS summit was about what lies ahead—how emerging economies deliver on their promises. Contrary to Trump's apprehension, the US remains the pre-eminent global power. That explains China's response to the 10% additional tariff.

The Rio summit and the Quad foreign ministers' meeting point to the same thing: multilateralism remains the only viable response. To ensure that the world does not move from a US-dominated world order to one defined by the Beijing-Kremlin combine, countries like India need to step up and engage more globally to build a multilateral system that is fit for the 21st century.



## This Column Must've Used AI (It Didn't)

Once upon a time, there was the worry that when you banded in your school essay, it would be so decent that your teacher would return it a few days later, accusing you of getting your mother to write it for you. Now that you're a big boy/girl/bird, your concern is that everyone will think you've used an AI chatbot. 'Bet DeepSeek or Copilot wrote that,' is a tough accusation to shake off—especially if your natural writing style has a knack for being a tad purple, and your fondness for words like 'symphony' and adjectives like 'delightful' and 'mesmerising' can't be curbed.

People who love the style in which AI writes—still overwhelming in English, since Hindi, Marathi, Bengali... walaas are busy gawking at the tech—are usually unaware of the concept of 'style'. You write (in AI-speak 'you pen') a scathing, bullet-pointed, too-many-adjective wooden op-ed, and even with the help of only cutting-edge Spellcheck Holmes and no ChatGPT, others will hiss, 'Oh my, it smells like AI.' At this rate, even writing 'Happy Birthday' with proper punctuation is grounds for running a Turing Test. So, beware. If you show signs of intelligence—especially one that's suspiciously artificial—stop writing. The other option is that you get a smart person to ghostwrite for you. Because writing yourself without using a chatbot might expose your incompetence further.

## TESSSELLATUM

Credit revival likely faster this time due to stronger fundamentals

# Coiled For a Comeback



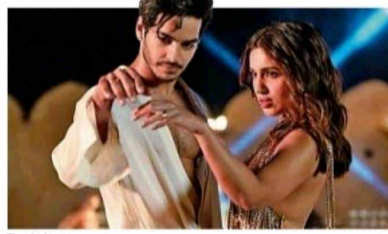
Neelkanth Mishra

RBI has eased monetary conditions, with MPC members talking of 'the need to support growth'. The focus now shifts to the first step in growth restoration—a revival in credit growth, that is, monetary transmission.

How fast can credit growth pick up, and by how much? Several commentators lament the current weak demand for loans and point to prolonged lull in the monetary-easing episodes of 2002 and 2014. Whereas their concerns and observations hold merit, current conditions are meaningfully different than in prior cycles and so should outcomes. Let us assess four major channels of monetary transmission: rates, credit, asset prices and exchange rates.

► **Exchange rate** When interest rates fall, a country's currency tends to weaken, which becomes a growth stimulus (exports become more competitive and import substitution becomes an opportunity), boosting demand for credit. However, given that the rupee is not fully convertible, it is only weakly affected by interest rate differentials, limiting the impact of this channel.

► **Asset price** A reduction in interest rates boosts prices of both financial and real assets. Borrowers then feel more emboldened, and lenders have more collateral to lend against. This channel is also not potent here, as the economy is far less financialised than other major economies, and interest rates have, at best, a marginal impact on asset prices.



Two to tango

► **Rates** Lower interest rates increase demand for loans. Rates on new loans change in the same direction as policy rates, though the gap between them varies, reflecting transmission lags. For example, interest rates on term deposits (TDs), which account for 60% of funds for banks, would only come down over a year, as 75% of TDs are of greater than one year duration currently.

That said, most banks have cut interest rates they pay on savings account balances and wholesale funding rates, as measured by rates on certificates of deposit (CD) of 12-month duration are down more than 1.75%. Thus, banks are now cutting interest rates on new loans, which should boost loan growth.

► **Credit channel** In the 1980s paper, inside the Black Box: The Credit Channel of Monetary Policy Transmission, Ben Bernanke and Mark Gertler, between heroes and heroines is not new—namely that monetary easing helps credit availability via its impact on borrowers and lenders. Creditworthiness as well as lender's risk appetite. Given that banks are also businesses, their willingness to take on credit risk will depend on economic momentum. Usually, monetary easing starts when the momentum is weak, like it is now, so naturally at such points banks are less willing to take business risk.

This is the most potent channel of monetary transmission in India. The low debt-to-GDP ratio in India indicates demand for loans far exceeds their supply at all points of time.

Whereas many believe that credit growth slowed last year only due to curtailment of unsecured personal loans (PL), data shows a broad-based slowdown driven by banks de-risking. Unsecured PLs contributed to only a fifth of the growth decline; bigger contributors were bank loans to non-banking financial companies and agriculture.

In fact, a 2018 St Louis Fed paper focused on the US shocks to unsecured firm credit explain more of economic fluctuations than shocks to secured credit, demonstrating how banks' risk appetite affects economic momentum. They found unsecured firm credit is pro-cyclical and tends to lead GDP (meaning growth in risky loans occurs before economic growth), whereas secured firm credit is a cyclical.

Whereas in 2014 nearly 90% of bank loans were at interest rates higher than 12% (loans at higher rates are considered riskier), today that ratio is just 11%. Over the past year, the banking system curtailed loans at rates above 10%, collectively de-risking further. For these loans to grow again, banks' risk appetite must improve, and that may not occur immediately at the start of monetary easing.

We expect this to be a gradual process that slowly gains momentum—the first percent point increase in loan growth would improve economic momentum, which, in turn, would affect the demand and supply of higher-interest rate (riskier) loans.

It is also likely that improvement should be meaningfully faster than in prior cycles due to three reasons.

► **There is no overhang of unsecured bad loans**, whereas in 2002-04 due to SARFAESI Act, and in the

Market share has shifted to private banks, which pose greater risk appetite—so credit transmission may be quicker now

2014-16 period due to the Asset Quality Review (AQR) and then the new IBC, borrowers as well as lenders were cautious.

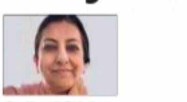
► **There is much more capacity to lend and borrow**, as lenders are well capitalised and borrowers have low debt-equity ratios.

► **Market share in the banking system has shifted towards the private sector**. In the 2002 and 2014 cycles, PSBs held nearly three-fourths of assets and liabilities, but their share is now just half. As private banks have more incentive to take risk, once economic momentum builds, the credit channel of transmission should work faster in this cycle.

The first signs of improvement could be visible in a few months. The acceleration thereafter can be faster, as regulatory easing (cuts to risk weights as well as the cash reserve ratio) is likely to amplify the recovery, and bank capital buffers are strong.

The writer is chief economist, Axis Bank

## Kamal's Kiss Unsettled Fans



Sudha G Tilak

There's a moment in Thug Life, directed by Mani Ratnam and starring Kamal Haasan, that has sparked not adoration but alarm, at least on social media. Kamal strides onscreen with his signature swagger, lean frame, and that unmistakable, gravelly voice that has weathered both time and trend. And lit the match.

The 70-year-old legend, playing a gun-slinging rebel, locks lips with a much younger heroine playing his wife. And he has a concubine in the story, claimed with all the quiet entitlement of a man who knows he's still alpha in the room.

The internet did what it does best: served up memes, mockery and moralising. At the centre of it all lies the question no one can stop asking: what is it about old men and their eternal onscreen virility?

To his credit, Kamal leans into the absurdity. In a cheeky nod to cinema history, his character whispers to Trisha, 'Madam, I am your only Adam,' a throwback to Amitabh Bachchan's infamous flirtation with

Aishwarya Rai in Bunty Aur Babli (2006). Point made. But the line also invites an uncomfortable chuckle. Is geriatric testosterone believable? Aspirational? Or just absurd?

To understand the optics of Thug Life, it helps to zoom out. The age gap between heroes and heroines is not new—neither in Indian cinema nor in Hollywood. Sean Connery kissed Catherine Zeta-Jones in Entrapment at 68. Harrison Ford, Clint Eastwood, Liam Neeson and Tom Cruise have all romanced much younger women while dodging bullets, bombs and biological reality.

In India, the older-hero-younger-heroine trope is practically a genre. Rajinikanth (73) was paired with Nayanthara (39) in Darbar. Chiranjeevi, Nagarjuna, even the ageless Shah Rukh Khan—tame a senior male star and you'll find him romancing someone two to three decades younger.

So why is Kamal's kiss or his concubine in Thug Life triggering? It's not really about the kiss. It's about male mythology. In South Indian cinema, especially the hero is more than a character. He's a force—a beady mix of power, invincibility and simmering sexuality. Age? Just a minor inconvenience. 'Testosterone?' An eternal supply. Onscreen, our heroes remain lithe, lascivious and legacy-lubricated. The older male lead isn't portrayed

as someone fighting against age but as someone untouched by it. Welcome to Hormonal Replacement Therapy.

But here's where Thug Life gets interesting. Kamal doesn't mask the years. The film acknowledges his age, the scars, the complex power dynamics of keeping a concubine. It attempts to both flaunt and interrogate male privilege. And yet, it walks a tightrope—trying to be woke while indulging in the very fantasy it critiques. The niggles are real.

So again, why does Kamal get troubled? Perhaps because Kamal, unlike many of his peers, doesn't hide behind stylised heroism. He has, throughout his career, chosen complexity over comfort: playing a grandfather in his 30s (Nayakan), a wrinkled freedom fighter with prosthetics (Indian), a dwarf in

Apoorva Sahodargal, an aged failed classical artist in Sagara Sangamam. In Thug Life, he owns his aging reality, complete with his kiss, concubine and charisma. It's not fantasy—it's provocation. And maybe that's why it stings. As Kamal says in the film, 'Screen is my "seasoned charm".' When Kamal does it, it's creepy. What's being poked isn't just age—but race, region and who's allowed to age. The real dissonance, though, lies in the arc. We're happy to suspend disbelief for dying cars and bullet-riddled heroes who walk away from explosions. But one kiss between a vintage rebel and a young heroine? Suddenly, we're clutching pearls.

Meanwhile, the leading ladies remain stubbornly youthful. The double standard is glaring. While male stars age like whisky, women are discarded like soda gone flat. Actresses over 40 struggle to get leading roles, let alone lead action ones. It's not just sexist, it's systemic. We equate masculinity with eternal potency and femininity with a ticking clock.

As Kamal kisses and quips his way through Thug Life, the audience will watch some in admiration, some in mockery, but all in curiosity. Maybe what we need, less testosterone on screen, but a little more honesty about what it costs to keep the myth alive.

The writer is chief investment officer, ASK Wealth Advisors

## THE SPEAKING TREE

### Choose the Right Handle

NAJIB SHAH

Epictetus, a Stoic philosopher, raised issues which have resonance to this day—how can I live a happy life? How can I be a good person? He considered the two synonymous, that you cannot be happy without being virtuous. He postulated the theory of two handles—one by which it may be carried, by which you can address a situation amicably, and one by which it cannot.

The two-handle theory can be applied to all aspects of life. If a close friend were to behave badly and you were to grasp the situation by the handle of hurt and anger, it would leave you feeling unhappy. If on the contrary, you were to focus on the fact that you had shared many happy times with the friend, you would not rush to judge his conduct. You would try to understand the reason for his behaviour; you would forgive and forget. You would act virtuously and carry no bitterness. You would not be unhappy.

Happiness, as Epictetus says, depends on three things, all of which are within our control—our will, ideas and the use of our ideas. In other words, happiness is independent of the external conditions. You realise that nobody can hurt you. This requires you to be confident enough to live life on your terms. None of this is easy but it is only by struggling to do what is right that we develop spiritual awareness. And then you would definitely make a virtuous choice, you would choose the right handle.

## PARANORMAL ACTIVITY

### Fear and Loathing in Las Vegas

Hunter S Thompson

We were somewhere around Barstow on the edge of the desert when the drugs began to take hold. I remember saying something like 'I feel a bit tight-headed' and you should drive.

And suddenly there was a terrible noise as the vast sky filled with the sound of a great big, white, swarming, and screaming. A low sound and then whizzing and swooshing and diving and on the edge of the desert there were a hundred miles an hour with the top down to Las Vegas. And a voice was screaming: 'Holy Jesus! What are these goddam animals?'

Then it was quiet again. My attorney had taken his shirt off and was pouring beer on his chest, to facilitate the tanning process. 'What the hell are you yelling about?' he muttered, staring up at the sun with his eyes closed and covered with wraparound Spanish sunglasses. 'Never mind, I said. It's your turn to drive.'

I hit the brakes and aimed the Great Red Shark toward the shoulder of the highway. No point mentioning those bats, I thought. The poor bastard will see them soon enough. It was almost noon, and we still had more than a hundred miles to go.

## Chat Room

### A Country Fit For Children

Appropriates the 'Missing Children? Fix Root Causes' (July 7). The statistics alone give us a sense of the extent of the problem. Stolen children, hoodlums rank among the most heinous crimes. That poverty and deprivation often push parents to sell their children is a cry that rings in a country that prides itself on its growing economy. Better investigation of child-trafficking rings, and improved and swift prosecution can help tackle this menace. We also need a society that cares, that creates opportunities for all children to enjoy a carefree childhood and become the best versions of themselves. Anthony Henriques, Mumbai

Letters to the editor may be addressed to editor@timesofindia.com



Somnath Mukherjee

Latest World Bank data puts India's Gini index at 25.5 in 2022-23, making it the fourth most 'equal' country in terms of income, after Slovak Republic, Slovenia and Belarus. While Gini has described this as a 'remarkable achievement' that 'reflects how India's economic progress is being shared more evenly across its population', the insight is different.

Other indicators are also trotted out to show India's achievement in growing 'equality'. Household Consumption Expenditure Survey (HCES) 2021 claims a decline in consumption inequality between 2011 and 2021 across rural and urban India. But data becomes more acute, with less uncertainty, in wealth—compared to income. India's wealth concentration is high and increasing. But so is the case with China, at a rate faster than ours. Brazil is higher than both. An obvious rationale could be the stage of development—lower and middle-income countries have

higher structural inequalities compared to high-income countries. Perhaps it's the price to pay for growth? Even accounting for that, India's wealth concentration is high by Asian standards.

India's financial markets are an outlier—in terms of efficiency, sophistication and global interest, they compare with developed countries. Bangladesh, Brazil, or even China don't have comparable markets for infrastructure. This enables India's entrepreneurs to monetise assets efficiently. It also prices Indian assets at a premium to most other EMs.

Is the paper wealth of promoters a function of structural wealth inequality or merely a function of the premium pricing of assets?

There have been several cases, including storied start-up founders, where paper wealth has been evaporated overnight as businesses floundered or investor interest dried up. So, promoter equity valuation is an imperfect measure of wealth, given how unmonetisable and ephemeral it can be. The bulk of common outrage on inequality, though, hangs its coat on the banner of this singular variable. Besides redistribution, the other fix to inequality has been to expand and deepen the tax base. With grand totals too—the number of 17 filers has doubled in the last decade while 17 as a % of GDP has gone from under 2% in 2020 to nearly 4% in 2025. Despite progress, a small cohort—2-3 % of the population—accounts for all income taxes and a large proportion of indirect taxes.

Find new growth drivers

At less than \$3,000 per capita income, India's tax-to-GDP ratio, at 17.1%, is in line with global averages. Similar income levels, however, with four times India's per capita income, has a slightly higher ratio. There are some extreme anomalies—unpaid income is an obvious one—but by and large, Indians pay enough tax. Affluent Indians, as they should, pay more than enough—peak tax rates in India are at the top end of Asian levels.

India, since 1991, has been a great macroeconomic story and a spectacular markets story. A steady, compounding GDP growth rates of 6-6.5% is an achievement. But it pales against the performance of other Asian countries—the Tiger economies in the 1970s/80s and Asia since the 1990s—most of them clocked 8% and more for decades at a stretch.

More worryingly, the single biggest structural lever of development since 1991—growth in IT services that enabled the creation of tens of millions of high-paying jobs—is running out of steam. AI and automation are rendering large swathes of IT jobs redundant globally. There is a desperate need for India to identify the next big thing, without which it will be near impossible to make growth up from the sticky 6-6.5% handle.

The biggest challenge now is to graduate to at least upper-middle-income status quickly, before demographics start to militate against the effort. It's not only an economic imperative but a national security imperative. A national policy of wealth inequality will make suboptimal policy choices and perform sub-optimally as India has often done in history.

The writer is chief investment officer, ASK Wealth Advisors





Elections belong to the people. It's their decision. If they decide to turn their back on the fire and burn their behinds, then they will just have to sit on their blisters

Abraham Lincoln

INDIAN EXPRESS IS NOT AN INDUSTRY. IT IS A MISSION.

—Rannath Goenka

## INDIA'S CALCULATED BRICS BET: BALANCING MORALITY & REALPOLITIK

INDIA'S engagement with BRICS reflects a deliberate pursuit of multi-polarity, leveraging the platform to amplify the Global South's concerns while preserving strategic autonomy. As BRICS evolves from an economic coalition into a more politically assertive bloc, India is tasked with carefully navigating its role to maximise national interest without alienating key partners such as the US. The condemnation of the April 22 terror attack at Pahalgam in the summit declaration underscores BRICS' growing alignment with India's counter-terror agenda. It strengthens New Delhi's global campaign against cross-border terrorism, while reaffirming that terror cannot be justified by religion or ideology.

India also endorsed BRICS' strong statement on the humanitarian crisis in Gaza, condemning the Israeli strikes and aid blockades. It voiced concern over Palestine while preserving its vital defence and strategic partnership with Israel in demonstration of the ability to balance moral leadership with realpolitik, which has become a strategic imperative. The bloc also denounced Israel's strikes on Iran, a country critical to India's regional calculus, especially because of the Chabahar port and energy routes. Support for Iran's sovereignty, without deepening confrontation with the West, reflects India's nuanced diplomacy amid regional volatility.

However, BRICS' growing geopolitical assertiveness has rattled Washington. In a post on Truth Social, Donald Trump warned: "Any country aligning themselves with the anti-American policies of BRICS will be charged an additional 10 percent tariff. There will be no exceptions." The blunt threat reveals a deeper fear that BRICS is becoming a counterweight to US-led global structures. India's strategy has not been about confrontation; it's about hedging bets in a world of fractured alliances. However, it will take a great deal of convincing to drive home this point with President Trump. India also made clear it does not support de-dollarisation or a BRICS currency. While it promotes bilateral trade in local currencies, New Delhi has acknowledged that the US dollar remains central to global finance.

India's message is subtle but firm: BRICS is not an anti-Western alliance. Rather, it's a platform to reshape global governance more equitably. As power centres shift, India must balance Great Power ties with pragmatic multi-polar engagement. Having a role in shaping outcomes need not always mean choosing sides. In a divided world, India's BRICS playbook should evolve into a strategic clarity that is driven not by ideology, but by national interest.

## SHUBMAN EARNS RESPECT, TEAM GAINS MOMENTUM

WHEN Shubman Gill took the final catch and led India to a famous win against England in the second Test at Edgbaston, he became part of Indian cricketing folklore. The records sum up the enormity of the achievement. It was India's first Test win at the venue and the biggest margin of victory (336 runs) playing abroad. This assumes significance as India are not considered successful travellers. One of the most satisfying parts of the show was the captain's own performance—scoring a double-hundred and following up with a hundred. It seemed like a perfect antithesis to Leeds, where the visitors crumbled despite having dominated large chunks of the first Test.

Eyebrows were raised when head coach Gautam Gambhir and Gill decided to play more all-rounders rather than Jasprit Bumrah. However, quite a few individual performances smoothened the creased foreheads. Among them, those of Shubman, and pacers Mohammed Siraj and Akash Deep had a lethal edge. The captain himself scored a record 430 runs while batting for 12 hours over the two innings. Then Siraj and Akash Deep filled Bumrah's vacuum. Siraj became the leader and Akash Deep, playing his first match of the series, took 10 wickets before dedicating the performance to his sister who is battling cancer. As much as it will be about Siraj and Akash Deep doing the improbable in what was considered a flat pitch, Gill will walk away with the most valuable player's honours.

Gill needed this knock to stamp his authority as India's captain, especially after the first Test loss. This showed everyone in the dressing room that he is a leader they can look up to. Like they say, respect is earned through action and not words. It is more than fitting that from now on, this will be known as Gill's India Team. At the same time, Gill and Gambhir will have to get the playing 11 right at Lord's. With Bumrah back in the mix, if India get the team's composition right, they will have a chance to take a 2-1 lead in the five-Test series. The wounds from the Australia series last winter are still fresh and there is no room for complacency. However, as of now, India have both the buzz and the ball.

### QUICK TAKE

#### DUCKING UNDER HEALTH COVER

THE glare of spotlight on a sensational case can reveal a deeper rot. After Narendra Vikramaditya Yadav was arrested in April for impersonating a British cardiologist to perform heart procedures—at least seven of which resulted in deaths—at a church hospital in Madhya Pradesh's Dahoh, the National Human Rights Commission joined the probe. Its recent recommendations include checks on the possible misuse of Ayushman Bharat, including soliciting foreign donations for treating Ayushman card holders. It has requested all state governments to check whether the scheme is being implemented properly in letter and spirit. Monitoring of the world's largest health insurance scheme should be continuous and its reports made public at the soonest.

THE public has often heard of the two-front threat to India's border security. However, for the first time in recent history, the country finds itself confronting an active and complex threat environment on three distinct fronts. Each adversary—Pakistan, China and potentially Bangladesh—presents a unique security challenge demanding entirely different response spectrums.

Bangladesh is really not an adversary yet. But in view of the current dynamics in bilateral relations, it's fair enough to consider threat options from that direction too. Together, this creates a continuous arc of strategic tension along India's western, northern and eastern borders. Managing this tri-junction of pressure calls not just for better resource optimisation, but for a complete review of how India perceives threats, including those in concert, in the near future.

In the case of Pakistan, it's all about hybrid war under a conventional and nuclear umbrella. The conventional military question remains in India's favour, but the role of Pakistan's military remains dangerous because of its historic irrationality, an offensive nuclear posture and the continued patronage of radical non-state actors. The terrain here is a complicated mosaic—high-altitude battle zones in J&K, riverine and canal obstacle systems in Punjab, and deserts in Rajasthan.

While Pakistan's army remains a professional conventional force, its real warfighting doctrine continues to be hybrid in nature. Radical proxies, extremist ideological mobilisation, information operations, cyber warfare, and cross-border terrorism remain the preferred instruments. Despite the recent failings in West Asia in the domain of hybrid conflict, Pakistan is likely to persist with its more refined and technologically proficient ventures.

Importantly, Pakistan is also increasingly reliant on air and missile deterrence. The emphasis appears to be on counterbalancing India's emerging air dominance and growing missile strike capabilities. Pakistan's strategy also appears designed to pose limited but credible offensive threats—particularly to ensure India keeps its reserve formations committed in the proximity of the western theatre, creating the inevitable decision dilemma about insufficient reserves for the northern borders.

The northern border with China presents a different class of threats—of intimidation, strategic distraction and geopolitical messaging, rather than imminent all-out war. Unlike Pakistan, China does not rely on proxies. It employs a calibrated strategy of grey-zone operations—transgression across the Line of Actual Control (LAC),

India faces risks on its borders with Pakistan, China and Bangladesh. The fact that the fronts represent three different types of threat increases the complexity in strategic thinking

## URGENT NEED TO PLAN AGAINST 3-FRONT THREATS

LT GEN SYED ATA HASNAIN (RETD)



Former Commander, Srinagar-based 15 Corps; Chancellor, Central University of Kashmir



military infrastructure buildup, psychological warfare and diplomatic signalling. The People's Liberation Army (PLA) is technologically far more advanced, better funded and integrated. But it's untested in modern conflict. Its preference has been to maintain controlled tensions along the LAC without triggering full-scale war. From Galwan to Yangtze, the PLA has sought political dividends from military standoffs while keeping escalation tightly managed. Missile exchanges, cyber intrusions, isolated special forces engagements, and forward base upgrades are more likely PLA scenarios than a full-frontal assault.

The strategy comes at a steep cost for us. India must commit significant, high-quality troops year-round to Ladakh, Arunachal and Sikkim, often dual-tasked with other roles. This stretches human endurance, operational readiness, and logistics in some of

the world's harshest terrains. The application of pressure on the Himalayan borders is designed to divert focus from maritime aspirations that China has in the Indian Ocean, where its freedom of operation is linked to its export-led growth story.

The third front is perhaps the least expected. Bangladesh, until recently a dependable—if delicate—partner, has now become a strategic question mark. The fall of Sheikh Hasina's government and the rise of a radicalised political ecosystem marked by Janat-ul-Islami's resurgence, has changed the character of Dhaka's policy orientation.

At a purely military level, Bangladesh is not in the same league as Pakistan or China. Yet, its nine-division army has strategic utility for India's adversaries. A hostile or neutral Bangladesh creates two immediate problems for India. First, it makes the Siliguri Corridor more vulnerable than ever.

## THE DISTURBING RETURN OF 'SCIENTIFIC RIGGING' CHARGES

THE Election Commission's special intensive revision (SIR) of electoral rolls in Bihar is turning into a political confrontation that's threatening to spread like wildfire to the four states and one Union territory due for assembly polls in 2026.

The documentary proofs required to verify citizenship under the new SIR rules are highly unusual. It seems not all citizens are presumed equal in the eyes of the Election Commission. Voters who have been enrolled after 2009, when the previous SIR was conducted, need a new set of documents that effectively delegitimises Aadhaar voter IDs, ration cards, MGNREGS job cards and even passports. In 2025, voters need to produce birth certificates for themselves and their parents, land deeds and revenue receipts. By adding this new list of documents, the EC has inserted itself into the vicious political clash that routinely descends into accusations of being 'anti-national', converting the accuser into a self-appointed vigilante. The disruptive format and the obvious rush to get it done have transformed the Bihar election into a confrontation between the EC and non-NDA political parties. The face-off will likely spread to West Bengal, Assam, Tamil Nadu, Kerala and Puducherry, where the next round of elections are scheduled in 2026.

The list of additional documents demanded is problematic for more reasons than one. Neither the Union home ministry nor the police ministry have recently embarked on a mission to identify and deport illegal immigrants from Bangladesh accept land deeds, school certificates, revenue receipts, pension records, caste or other certificates as proof of citizenship. As it happens, some deportees submitted land deeds, school certificates and revenue receipts going back beyond a generation.

The West Bengal government has been dealing with thousands of such cases of wrongful deportation from the BJP-ruled states Haryana, Rajasthan, Maharashtra, Gujarat, Delhi and Madhya Pradesh—where, to be Bengali-speaking, lungi-wearing and Muslim seem to be enough evidence of illegality.

In West Bengal, the legitimacy of residents as citizens has loomed large with every election for over a decade, coinciding with the BJP's ascent as a challenger to Mamata Banerjee's Trinamool Congress. Politics has divided the state's population into Hindu and Muslim vote banks—the

first group deemed citizens by virtue of their religious identity and the second often deemed illegitimate because of the presumption of illegal migration.

The politics of weaponising the legitimacy of citizens as voters has an even longer history in Assam. The rise of Asom Gana Parishad in the 1980s was based on a demand for verifying citizenship and excluding anyone the party deemed not a 'bhumi-putra' (son of the soil).



SHIKHA MUKERJEE

Senior journalist based in Kolkata

The hurried voter roll revision in Bihar risks disenfranchising up to a quarter of the state's voters. With this, the Election Commission has needlessly inserted itself into a vicious political fight that threatens to spread to other states soon

The timing of the SIR in Bihar—which is just the beginning, as Chief Election Commissioner Gyanesh Kumar announced—is a political bunker-buster grenade with the pin pulled out. The EC is not mandated by the Constitution to undertake this verification; its job is to enlist voters and remove dead persons or fake voters, including those whose names have been incorrectly listed more than once. A clarification is necessary that not all fake voters can be presumed to be illegal Muslim immigrants given documents by political parties, as has been alleged by the BJP.

Fake voting and "scientific rigging" by the CPI(M)-led Left Front was converted into a mammoth protest by Banerjee, who

launched a mission in 1983 to forcibly occupy Writers' Buildings, the state secretariat at the time, and throw out the Jyoti Basu government. Distribution of EPIC (Elector's Photo Identification Card) or voter card was initiated in 1983 to weed out fake voters and, by extension, kill the rigging methodology the Congress alleged had been put in place by the CPI(M).

The EC's SIR exercise, however, is different—it is focused on citizenship, not falsification or misrepresentation. Even before SIR was unrolled in Bihar, Banerjee had sounded the tocsin about revising the rolls in West Bengal and warned that the opposition had to prepare to fight the EC over inclusions and exclusions. Post the Maharashtra polls, her politically hyper-sensitive antenna had interpreted the emanating signals for potential trouble over the rolls and a revision in the EC's jargon.

"The cat is out of bag as to how the BJP is manipulating the voter list with the blessing of the EC," Banerjee declared in February 2025 after reports that voter IDs with the same EPIC number had been issued in more than one state. In March, she accused the EC of issuing duplicate IDs in Haryana and Gujarat. The accusation amplified Rahul Gandhi's charge that some 30 lakh new voters had been added in Maharashtra in just five months before the assembly elections.

In Bihar, SIR could disenfranchise up to an estimated 2 crore or 25 percent of the voters. The July 9 state-wide agitation called by opposition parties looks like the start of a battle that will spread to Bengal. In March, Banerjee declared that as a person who had gone on a 26-day hunger strike in 2006 to protest against the then state government, "If required, we will protest indefinitely in front of the EC office."

India's electoral democracy project—a bold adventure when it began in 1950—had a very large purpose as an inclusive exercise through universal adult franchise. With that backdrop, EC's current agenda is open to interpretation as a multipurpose de-weeding machine that goes to the heart of that project.

(Views are personal)

### MAIL BAG

WRITE TO: letters@newindianexpress.com

#### Vox populi

Ref: Guiding principle is to defend, not deny the right to vote (Jul 7). The intention behind the exercise is neither positive, nor negative. The nature of reforms and the timing gives it away as it makes compliance not only difficult, but next to impossible for many poor villagers. **Raju Mathai, Kochi**

#### Cleaning Yamuna

Ref: Dying Yamuna symbolises India's apathy to rivers (Jul 7). Yamuna's clean-up would require joint efforts by the public and the administration at multiple levels. A monitoring committee comprising experts and representatives chosen by the public must evaluate the progress regularly. Only a sense of urgency can prompt such endeavours. **S M Visakh, Thiruvananthapuram**

#### Bharat's moment

Ref: Caught in the Larousse trap (Jul 7). With world powers at loggerheads with each other, the ordinary people are not helped. India's actions speak louder. Maybe, Bharat has a more complete 'Larousse'. The only thing we don't trumpet is quaintness. **A Rajkumar, email**

#### Presidential journey

Ref: Nationalist President on the move (Jul 6). It is worthwhile to say that the President represents the struggle and success saga of India and the Indian masses. Coming from humble tribal roots, her journey is so enlightening because of her humility, honesty, simplicity, determination and grit. **Hullasa Behara, Bhubaneswar**

#### Akash's tribute

Ref: Birmingham breached, over to Lord's (Jul 7). Akash Deep, who led India to a historic victory, wasn't just claiming wickets, but was scattering rays of hope on his sister's fate. When the young seamer got emotional about his sister's ailment, his words shook many hearts. This isn't just a sporting win, it's a tribute to brotherly love. Akash's story inspires every soul, giving wings to every courage. **R K Jain, Barwani**

#### Roll call

Ref: After Bihar, poll panel now plans revision of rolls in Bengal, Delhi (Jul 7). The move seems dispensable, as the former Election Commissioner Ashok Lavasa has also struck out a name for the Election Commission to check the identities of voters. **CV Aravind, Chennai**





### A thought for today

My mom is the only one who still writes me letters. And there's something visceral about opening a letter - I see her on the page. I see her in her handwriting

STEVE CARELL

## Smooth Landing

India Post & other GOI depts can easily earn good money, by monetising their land & buildings

It's a bad time to be in the mail business. Denmark is removing all letter boxes because the volume of personal mail has fallen 90% since 2000. UK's 500-year-old Royal Mail was sold to a Czech billionaire last year, because it's not popular anymore. From a peak of 20bn letters per year in 2004, it came down to 7bn in 2024. US Postal Service lost \$9.5bn last year, up from \$6.5bn in 2023. With 1,651 post offices, India Post is the largest mail carrier in the world, and its losses aren't insignificant either. But scrapping it is not an option as 90% of post offices serve rural locations, and remote or tribal areas.

Govt has been trying to boost revenue by turning India Post into a logistics firm - delivering Amazon packages in remote areas, for example. But monetising the larger post offices, especially the 15,823 in urban areas, could also improve finances. As communications minister Jyotiraditya Scindia told **TOI** in an interview: "You can have the post office on the ground floor and build the whole building and lease out space." It's a timely idea, not only for the department but also private businesses and institutions scouting for leaseable premises in India's fast-growing cities. As Scindia said, India Post is already examining its paperwork to identify post offices that could be developed first, and other govt departments should follow its lead.

GOI is the largest landowner in India, possessing some 15,500 sq km, more than 10 times the area of Delhi. Indian Railways alone owns at least 4,900 sq km of land. The defence ministry reportedly owns about 50% more. And there are dozens of other departments with large landholdings. Most of this land cannot be commercially developed, of course, but if even 1% can, we're talking 155 sq km - a quarter of Mumbai. Niti Aayog has pointed out that India's public sector is sitting on an inventory of "underutilised land assets". Consider that railways has leased out only 88 sq km or less than 2% of its land bank for passenger and cargo facilities, and commercial development. Niti's advice, under the National Monetisation Pipeline, is to "own, hold, manage and monetise" land and building assets of GOI-owned public sector enterprises. This strategy can not only trim losses, but also help improve passenger experience in trains and stations, and ensure India's letter boxes don't go the way of the pay phone.



# OUR EYES IN THE SKY

Damage assessment of conflicts like India-Pak, Israel-Iran is shaped by satellite images. But these can be gamed. Iso & pvt companies in space sector must up the game so that Indians get good domestic data

Nithyanandam Yogeswaran



In today's dynamic geopolitical landscape, information warfare is increasingly shaped by social media platforms. It's widely believed that what we're witnessing here is driven by traditional open-source intelligence (OSINT), especially satellite images. But there's a crucial distinction between open-source images and commercial satellite imagery.

OSINT refers to information gathered from sources legally accessible to the public, such as academic articles, govt reports and media publications. On the other hand, openly available information may be accessible to the public but comes with conditions, such as the need for payment, licensing, or specific permissions for use and share. The difference lies in purpose, accessibility and control. Using commercial images with necessary permission is not strictly adhered to in today's social media world, but these can have serious consequences.

The distinction becomes particularly relevant in modern conflict zones. In the current Israel-Iran conflict, much of the public discourse around 'damage assessment' is asymmetric - due to the limited availability of high-res images to social media analysts.

Are these images truly open source? Not quite, they are made available for information discourse. They are provided by a small number of commercial satellite firms, often selectively. Images that align with the narrative being reported tend to be released first. This selective availability is often market-driven and shaped by client priorities, commercial strategy, or geopolitical alignments.

This selective disclosure shapes public perception and often becomes the sole basis for assessing whether a military operation was a 'success' or not.

In fast-paced modern conflicts, where situations evolve rapidly, high-res satellite images often become the primary source of visual evidence. They are eye-catching and easy to interpret. Average viewer doesn't need a background in remote sensing to spot a crater or a damaged road. That's exactly why these images are so powerful - and so misleading, if not understood in context.

These typically show only the surface, the 'cosmetics' of the situation. In case the damages are external, they are sufficient. But in cases of underground damage and damage inside the building, social media lacks the patience to corroborate with ground alternate sources.

Other, more technical forms of remote sensing,

which could offer a more comprehensive view, are seldom shared. Because these require expertise to interpret and don't lend themselves to instant conclusions that social media thrive on.

Dependency on high-res images is only going to increase exponentially in the days to come. The larger question is, who has access to high-res images? Not everyone. Access is often limited to those who can afford it, or those who have strategic partnerships with satellite image providers. This creates an uneven



playing field in shaping the narrative.

During the recent India-Pakistan conflict, aside from official govt briefings, the first public images and updates came not from Indian sources, but foreign commercial satellites. These high-res visuals, quickly picked up by media and social platforms, helped shape the narrative - this time, one largely favourable to India due to broader geopolitical alignments. Yet, Indian analysts had limited access to comparable domestic data, curbing their ability to provide independent assessments when it mattered most.

Iso possesses the capability to image strategically important regions. While data from conflict zones is understandably sensitive, well-defined protocols could be established to allow selective sharing with

authorised users. Doing so would support timely, independent analysis and enhance India's ability to shape global information narratives with credibility.

To keep pace with global players, private Indian firms must be further encouraged to invest in advanced imaging capabilities. At present, the market remains narrow and largely oriented towards govt use. A more open, structured approach, aimed at civil use and international relevance, could help bridge this gap.

Consider the imbalance playing out starkly in the Israel-Iran conflict. Satellite imagery showing the aftermath of Israeli strikes in Iran has been widely circulated. When it comes to Iranian strikes on Israel, similar imagery is scarce. Or absent.

While Western commercial imagery dominates global media, other players such as China's Gaofen series or Iran's own satellites may also have imaging capabilities. But their outputs are typically not shared publicly or lack comparable resolution. The public is left with a skewed view of events.

While high-res satellite imagery is an invaluable tool in today's conflict analysis, we must remember that what we see is not always all there is. A crater on a rooftop may speak volumes, but what lies beneath the surface might be the real story, one that demands expertise, context, and a healthy dose of scepticism.

As conflicts and linked narratives ride on information, the risk of disinformation through doctored satellite images is real. With today's generative AI tools, it's surprisingly easy to tweak visuals, altering a background, erasing objects, or creating entirely misleading scenes.

Satellite images are particularly vulnerable, especially those shared without proper geolocation tags. And in the heat of war, manipulated images can spread fast on social media, shaping public opinion before the truth can catch up.

Debunking such content isn't easy. It needs access to high-quality, time-stamped images, which isn't always possible, especially when the location information is unclear or the manipulated image. Even when verification is possible, it depends heavily on commercial satellite companies being ready and able to capture and release the necessary data on time. That's a tall order in the middle of a fast-moving crisis.

This is why it's becoming essential for countries to invest in their own advanced imaging capabilities. Having sovereign control over satellite data doesn't just strengthen national intelligence; it also gives analysts the tools to challenge false narratives quickly and credibly, when timing matters most.

The writer heads *Tukshashila's Geospatial Research Programme*

## Marathi Manoeuvres

BMC polls made Uddhav team up with bro Raj. He may not recover politically if he fails

U BT Sena's Uddhav Thackeray, a practitioner of fluid politics, joining hands with MNS boss cousin Raj, a far-right hardline Marathi-Maratha politician, is unsurprising - the bro was to win elections in India's richest civic body BMC. Shiv Sena has won BMC polls since 1985, barring 1992-1996. Raj broke away in 2005 after Uddhav inherited the party. Shiv Sena split in 2022 - Eknath Shinde toppled Uddhav govt and walked away with CMship, saikins, party and symbol. Cut to the present: MNS has zero electoral relevance. Uddhav is floundering. After Lok Sabha and state polls, elections to BMC - the jewel in Sena's crown - will be Uddhav's third test. He has struggled to articulate his idea of a more inclusive



Sena within the secular camp. When he resigned his post ahead of a floor test, it was a principled stand for a politician. It however cost him a potential return to office in the Supreme Court case that followed. Uddhav won the people's sympathy, sweeping LS polls, only to come a cropper in state elections. Mahayuti (BJP-Shinde Sena) has held ground as a unit. UBT Sena long announced it wouldn't contest BMC polls as part of MVA. In tying up with MNS, Uddhav has turned another corner. Is there a meeting ground? If anything, it was Raj who raised eyebrows. He created an opening for a patch-up when he criticised Centre's reaction to Pahalgam attack. MNS brings saikins, UBT Sena brings Uddhav. Will it be enough? In 2022, OBC quota within BMC was a contentious issue - in 2020, under Uddhav, delimitation increased the number of wards from 227 to 236. Shinde scrapped that in Aug 2022. As the process for the election gets underway, it's such issues that will influence outcomes. The stakes are high for both Shinde Sena-BJP and UBT Sena-MNS. But for Uddhav personally, a loss can be hard to recover from. In the last BMC polls in 2017, undivided Shiv Sena won 84 seats, junior ally BJP 82. No one got a majority in the 227-seat BMC. Sena retained mayor's post. But eight years on, BJP's the Big Bro, and CM Fadnis is aggressively if quietly calling the shots.

## Full nest sighs

Adult children are home, with no plans to leave again

Shinie Antony



Once was a time when Indian elders gathered at the well and praised the 'adult children' for living at home - the daughters till they were married off and the sons forever. Unlike *phoren log* who rent out their kids' rooms the minute they leave for college, we keep everything intact. Barbie posters and Pokemon cards, the sheets with strawberry or football prints on them. While the kid is away, we keep in touch and send saags.

Now the tables have turned. Children post-studies come and plunk themselves in their old bedrooms, staying out all night, waking up late, harking back to their monosyllabic adolescent selves. You suspect they are too lazy to do their own laundry; they say it's because they are deep in thought about what to do next. So terrified are they of doing the wrong thing, they'd rather do nothing at all. The children are home, and have no plans to move out. They are stancer.

Interested in helping around the house nor in finding a job, preserving their energy for some mysterious event in the future. It is the young who now get to lament over the empty nest once the old are gone - or settled into old-age homes. After studying medicine or architecture, they spend their time meeting other friends who are sitting at home just like them because, you know, they don't think medicine or architecture is for them. Unlike the previous generations, who wrote poetry and paint sunsets only as geriatrics because they spent their prime in gobs with pensions just as their ancestors wanted, no parent today dares to tell anyone what to study. Replacing canon with befriending of children was an error, say some historians - a tad late.

Good news is we won't be grandmas. Bad news is this child-free generation will never know how much we suffered bringing them up. There is going to be no apology from contrite progeny while handling their own cranky progeny. They are also sure they don't want to marry - this isn't to be clumsily questioned as they may cite their own parents' alliance plans for their anti-incest stance. Everything you remember as character-building is a traumatic memory for them; it is between them and their therapist. You may be thinking, burrah, I don't have to save for their wedding. But you do have to save for your own funeral.

## Bowling Against The Batsman Called Life

What's truly special about Akash Deep, India's newest sensation with the ball, is that his talent survived numerous personal tragedies

Anand Vasu



There are some magical days when a small window opens and allows you to see why some of the most mundane pursuits are elevated to magical proportions that capture the imagination of an entire country.

When India beat England in Edgbaston to level the series 1-1, Shubman Gill completed his transition from prince charming to the king of his castle. But if batsmen set up matches, bowlers win them for you, especially in Test cricket.

It is here that the unlikely hero emerged, in Akash Deep, whose 10 wickets in the game, including four on the final day, repaid the faith reposed in him and allowed him to play a vital role in making a piece of history. Whether Akash knew that no Asian team had won a Test at that ground before is unclear, but it will be years before he realises the gravitas of his achievement. On a pitch that was considered a batter's beauty - asked for by England and delivered by the groundsmen - Akash got the ball to do more than anyone else.

"I think he [Akash Deep] bowled with so much heart and the areas and the lengths that he hit, he was just getting the ball to move both ways." Gill would say soon after the win. "On wickets like these, it's very difficult to get the ball moving in both directions, and he was able to do that. He was

just magnificent for us."

But if bowling with heart alone won Test matches, everyone would be a hero, for there is no shortage of effort at that level. Akash is what India lacked when Mohammed Shami was deemed not yet Test match ready for this series. Akash lands the ball on a hard length through dint of muscle memory. This is something that can be learnt, if you have the right bent of mind, but not taught. It comes from bowling your heart out on large lifeless pitches in domestic cricket, something Akash is no stranger to in his 36 First Class appearances.

Akash's journey, from Sasaram in Bihar to Burdwan in West Bengal to pursue cricket, may have been less than 600km, but it is an unimaginable leap of faith for someone who had no money or time to pursue sport growing up. Why it was under the pretext of searching for a job that he even undertook. That's something of a trip, enrolling in a cricket academy without his parents' knowledge.

Even after he took that step - and this is an act of someone who knows his mind and is willing to back it up with the sheer force of his will - nothing came easy. Twin tragedies struck in 2015 when Akash lost his father and elder brother in the space of a few months, forcing him to quit the game for three years. If this was not enough, the Covid pandemic claimed the lives of his aunt and sister-in-law, while his mother was also seriously ill at the time.

A move to Kolkata, entry into a second division team, and the gold dust of Shami's advice brought him back into the system. Wickets in domestic cricket moved him forward, but even then, nobody could have prophesied Akash's Birmingham heroics.

When the team for the first Test of the series was picked, Akash had a niggly, and the Indian team was forced to call in Harshit Rana as cover. All the while, though, the coaching staff assured Akash that even he did not know just how good he was, keeping him in a state of preparedness, the powder dry, if you will, when the opportunity arose.

With 4 for 81 and 6 for 99, Akash gave a disbelieving country belief. In the absence of

Jasprit Bumrah, on a flat pitch, it appeared that India's team selection was defensive. But Gautam Gambhir had insisted all along that this unit had the depth to pick up the test. Akash's performance showed - if proof was needed - that the selectors who watch domestic cricket, the coaches who balance playing elevens and the captains who deploy resources, have a plan in mind, even if that is not always obvious to those on the outside.

Akash's effort took so much out of him that he spoke publicly for the first time about what had powered him when he stood at the top of his bowling mark. "This performance is for you. Whenever I picked the ball, only thoughts of my sister crossed my mind. I am with you," said Akash, dedicating his performance to Jyoti, his sister, who is battling Stage 3 cancer.

Despite receiving two video calls from her brother, who was now the toast of the nation, Jyoti could not quite believe that Akash had publicly spoken about what they were going through as a family. Akash explained that he was trying to hold it in, but just could not, and then told his sister not to worry for the whole country was now behind them. In the much bigger battle they were fighting, if that does not convince you that even sport, in this case the simple act of hurling a ball, can elevate us into being a part of something almost divine, nothing will.

The writer is a sports commentator

### Calvin & Hobbes



Jug Surajya

Walk the walk has become a popular trope, meaning practise what you preach. But walking the walk has other, more consequential meanings.

In the Australian Aboriginal community the 'walkabout' is a traditional rite of passage, a coming of age from youth to adulthood, which requires the adolescent male to go alone into the bleak desolation of the Outback following the 'Songlines', the trails in the bush left by generations of his forebears. More than a trial of physical and mental endurance, the walkabout is the initiation of an individual seeking a sense of oneness with the land and of his ancestral legacy, a holy communion linking a single consciousness with the universal.

In contemporary investment idiom Random Walk Theory refers to the

principle of unpredictability that underlies the rise and fall of stock markets. An often used analogy for this is that of an inebriate who wanders aimlessly about and ends up not knowing where he is. Stock market analysis apart, Random Walk Theory is used in a number of disciplines, from the sociology of group behaviour to devising military strategy.

However, as cognitive scientist Alexandra Horowitz shows in her delightful book, *On Looking: Eleven Walks with Expert Eyes*, we don't have to venture into the Australian wilderness, or be a market analyst, or military strategist, to learn new ways to walk the walk. Horowitz begins her walkabout of discovery by noting how our ability of mental concentration, of focusing and harnessing our minds to immediate

tasks, enables us to get on in the practical, workaday world. But this laser-like concentration also blunders us and narrows our field of outer and inner vision.

By the act of reading, you are "marshalling your attention to these words... You are ignoring the vast majority of what is happening around you." The events unfolding in your body, in the distance, and right in front of you."

So, while concentrating on reading, or anything else, is essential for us to get on with everyday living, it also makes us literally lose sight of a world unseen and unlivd.

Horowitz explores this univd world by taking eleven walks of the same block of her native New York City with eleven different companions, ranging from Pumpernickel, her

### Sacredspace

When we walk, we can walk for our ancestors and future generations. Maybe they had to walk with sorrow; perhaps they were forced to march or migrate. When we walk freely, we are walking for them.

Thich Nhat Hanh

## Learning To Walk The Walk

THE SPEAKING TREE

'curly-haired, sage, mixed breed' canine buddy to an artist, a geologist, and other 'Experts', each with a different way of seeing the same things.

"Minor clashes between my dog's preferences as to where and how a walk should proceed and my own indicated that I was experiencing... an entirely different block than my dog... I had become a slober or a sloper... what my dog showed me was that my attention invited... inattention to everything else."

Horowitz's walks became excursions into the art of observation, of seeing with a fresh set of eyes. "Together, we became investigators of the ordinary... in this way the familiar becomes unfamiliar, and the old the new."

The next time you go for a customary stroll, make it uncustomary by taking along a walking companion, with two legs or four. Who knows what new world, or worlds, you might find yourself in.