



Stifling a sane voice

U.S. sanctions against a UN official
are dangerous and absurd

The U.S. decision to impose sanctions on a United Nations Special Rapporteur for her criticism of Israel's war in Gaza has been called a "dangerous precedent" by the UN and top UN Human Rights Council officials. The comments followed U.S. Secretary of State Marco Rubio's announcement that Francesca Albanese, a "Special Rapporteur on the situation of human rights in occupied Palestinian Territories since 1967", would face restrictions as a result of her engagement with the International Criminal Court (ICC). The ICC has already been sanctioned by U.S. President Donald Trump in an executive order, shortly after he took office. While the scope of the sanctions are still unclear, they are understood to include travel and visa bans, and possible asset freezes for Ms. Albanese, who has drawn American ire with a report in June that urged international organisations to prosecute corporate entities and multinationals whose work helps fund the war. Ms. Albanese has frequently accused Israel of conducting the "cruelst genocide" in Gaza, as well as its takeover of the Gaza Strip. She has also been calling for scrutiny of the "Gaza Humanitarian Foundation", a U.S.-Israeli NGO. The U.S. actions have no doubt been spurred by Israeli Prime Minister Benjamin Netanyahu's latest visit to Washington, where he announced that his government would nominate Mr. Trump for the Nobel Peace Prize.

Amidst the rising death toll in Gaza and no ceasefire or deal for the return of Israeli hostages in sight, Washington's focus on a UN official is absurd and outrageous. Ms. Albanese's work is mandated by the UN Human Rights Council, and the U.S. actions undermine the global multilateral world order by calling those actions criminal. It is irrational to hold her responsible for the war and orders issued by the ICC and the International Court of Justice, which have heard testimonies from representatives of at least 40 states and international organisations on petitions calling for action against Israel. Mr. Rubio's contention, that Ms. Albanese should be sanctioned for engaging with the ICC to prosecute U.S. and Israeli nationals "without the consent of those two countries", is not legally valid. Further, his allegations that she "has spewed unabashed antisemitism (and) expressed support for terrorism" are not borne out by facts. As global outrage over Israel's killing of Palestinians, and the U.S. support for these actions, grows louder, as well as the BRICS summit condemnation this week, that India too joined, it is time for the U.S. to look in the mirror. The need is to effect an immediate ceasefire, and not in bringing the considerable might of the most powerful country to bear over one individual, in order to silence her voice.

English dreams

Imposing any language as the medium
of instruction is unacceptable

English medium education is an aspiration for many Indians, but state policy regarding the medium of instruction has been uneven across times and regions. The ongoing language debate in India, which stems from the renewed efforts of the Bharatiya Janata Party to enforce a three-language policy, has many components, the medium of instruction being one. Educationists generally argue that instruction in the mother tongue helps children achieve better learning goals in their early stages of development. This view is supported by pedagogical research, but it cannot, and does not, operate in isolation from other factors such as constitutional rights and ground realities. India's linguistic diversity and distribution is such that even the question of what is a child's mother tongue can often be a contested one. There is also the constitutional question of freedom of expression and choice. In 2014, after a protracted legal tussle, the Supreme Court of India held that a Karnataka government order of 1994 that made instruction in Kannada mandatory until Class four was not valid under the Constitution. For children have a right to choose, and the state cannot enforce its view on what is good for them. The rights of private educational institutions to offer education as per market demand is another related issue.

The National Education Policy that is being aggressively pushed by the Centre has a particularly anti-English edge, which is not in line with popular aspiration. Many States that want to promote their local language and culture also want to promote English education and English as a medium of instruction. In Karnataka, Andhra Pradesh, Kerala and Tamil Nadu, there are aided English medium schools. The demand for English medium education is growing – this includes the Hindi-speaking regions – which is met largely by sub-standard and expensive private institutions. English skills help individuals and the country in gaining a place in the global services sector. India's subaltern caste groups in particular seek to empower themselves through English education, which remains a currency for upward mobility. If state schools do not offer English medium instruction, relatively richer families could still access it through private schools. In this context, education becomes a continuing reproduction and even aggravation of social inequalities, which is the exact opposite of its purpose. The fact is that knowledge of English is empowering and convertible for other outcomes. There can be a debate on whether it should be the medium of instruction at the primary level, but a basic test of any policy is in how it advances the ambitions of the most disadvantaged sections.

New political contours in Tamil Nadu's shifting sands

With its Assembly elections less than a year away, Tamil Nadu faces a pivotal moment in its pursuit of an upper-middle-income economy. Distinct historically, the State has long resisted national homogenising forces, forging its unique political and social identity. This trajectory is now being tested by complex economic challenges and an assertive central government. The years ahead will determine whether Tamil Nadu can sustain its equitable growth model and preserve its ideological moorings amidst new political realities. Tamil Nadu's political landscape has long been defined by two distinct Dravidian strands. The Dravida Munnetra Kazhagam (DMK), known for what political scientist Narendra Subramanian calls its 'assertive populism', leveraged social justice and federalism to uplift marginalised groups. Despite criticisms of patronage, the DMK's ideological commitment has been consistent.

Conversely, the All India Anna Dravida Munnetra Kazhagam (AIADMK) practised 'paternalistic populism', prioritising patronage and welfare over ideology. Led by charismatic figures such as M.G. Ramachandran and J. Jayalalithaa, the AIADMK united diverse anti-DMK forces, from traditional upper-caste Congress supporters to landowning castes and welfare beneficiaries. It also mobilised Dalits against intermediate castes dominant in the DMK, forming a stable bipolar system, with the AIADMK as the DMK's enduring adversary.

This bipolar Dravidian system, while fostering patronage and corruption, also drove a competitive populist economic model. This facilitated comprehensive industrialisation as well as welfare in health, education, and services. The State's political exceptionalism has been crucial to its economic success, making it a beacon of inclusive growth, India's second largest economy, and significantly reducing poverty.

However, the Dravidian model has its limitations. Its competitive populism has delivered impressive quantitative outcomes such as good high school enrolment, extensive health care, and widespread industrial growth, but quality has often lagged. Learning outcomes are mediocre, employment quality needs improvement and unchecked industrial growth has degraded the environment. Critically, policies designed for the inclusivity of Other Backward Classes (OBC) may have reinforced caste divisions. Despite the State's social justice rhetoric, there is persistent and deep-seated casteism with ongoing discrimination against Dalits and inter-caste tensions. The focus of the Dravidian parties on caste-based mobilisation, while politically successful, has often institutionalised rather than transcended caste identities.

The rise of the BJP

The national ascendancy of the Bharatiya Janata Party (BJP) has fundamentally disrupted this binary system. Lacking significant ideological traction in Tamil Nadu, the BJP has sought to carve out space for itself by fracturing the AIADMK's traditional base, and fostering internal dissension and multiple splits. The irony is stark: a disarrayed AIADMK is now in alliance with the very force that is threatening its ideological and electoral space.



Srinivasan Raman

This opportunistic alliance now prioritises dislodging the DMK over ideological alignment. The AIADMK cynically leverages the BJP's central strength: blaming the DMK government for failures in securing central funds or abolishing the National Eligibility cum-Entrance Test (NEET) despite the Centre's refusal. More alarmingly, the AIADMK, under the leadership of Edappadi K. Palaniswami, a former Chief Minister, has now sought to use the BJP's corrosive ideology as a crutch, seen in his criticism of the current government using temple funds to construct colleges.

The DMK's strategy, in response, has been astute: forging a robust ideological alliance with the Congress, Left parties, and the Dalits-led Viduthala Chiruthaigal Katchi (VCK) among others. Chief Minister M.K. Stalin's accommodative leadership has maintained cohesion, with the perceived threat of BJP hegemony providing an ongoing ideological imperative. The coalition's strong anti-BJP stance, crucial for cohesion, has also risked unfavourable central policies.

The strength of this alliance lies in its inherent framework of mutual accountability. The Congress ensures a national perspective while the Left parties ensure awareness of worker and peasant and environmental issues, pushing beyond narrow industrial progress. Crucially, the VCK's presence represents a corrective mechanism to the DMK's historical limitations – anchoring the alliance to a comprehensive understanding of social justice that extends beyond OBC mobilisation to include Dalit recognition and upliftment – seen in the alliance's attempts at addressing caste discrimination and caste hierarchy more robustly.

Tamil Nadu's active civil society further underpins the State's ideological bedrock, championing a nuanced secularism. Unlike other States, where secularism can be defensive, Tamil Nadu's communities often identify as Tamilians alongside their religious identities, fostering inter-religious bonds. Rationalist movements, film-makers and writers have created popular support for progressive policies that attack casteism, patriarchy, and superstition whilst enabling redistributive governance. However, this intellectual and social foundation now faces its greatest test as the political landscape fragments.

Four-cornered contest, implications
Today, Tamil Nadu faces a new four-cornered contest. The economic implications are profound. New charisma-driven forces have emerged. Actor Vijay's Tamilara Vettai Kazhagam (TVK) attempts to replicate the AIADMK's matinee idol success with superficial Dravidian and social justice assertions. Conversely, film-maker Seeman's Naam Tamilar Katchi seeks to redefine Tamil nationalism away from its Dravidian core.

This fragmentation threatens to exacerbate the existing limitations of the Dravidian model. The AIADMK-BJP alliance aims to exploit rather than resolve caste tensions. Parties such as the Pattali Makkal Katchi, mobilising specific caste identities, have aligned with the BJP for narrow identity gains. These formations offer little towards solutions for environmental degradation, gender discrimination or improving education and employment quality – causes of concern in an

The changing political landscape could pose a challenge to the bipolar Dravidian system as well as the State's diverse ethos and distinct model of governance and development

otherwise developing State.

The DMK alliance's progressive framework offers superior conditions for economic transformation. Its emphasis on secular outcomes and social amity creates the governance capacity needed for such transitions. This is aided by the internal dynamics of the alliance. This structure, despite contradictions, provides the best framework for evolving beyond the Dravidian model's limitations while supporting social gains that are essential for economic progress.

The new fragmented political landscape could also affect the State's economic trajectory. New battles rooted in casteism or communalism could threaten its ambitions. Social conflict approaches that pit community against community and propagate medieval communal values undermine this transition.

As the State seems to progress to an upper-middle-income economy, it must avoid the middle-income trap, shifting to an innovation-driven, high-value manufacturing model. This requires heavy investment in research and development, digital literacy, and diversifying exports into more higher-value products and services – all of which demand greater state facilitation and fiscal autonomy.

The State contributed 11.9% to India's manufacturing GDP and has the most factories nationally. Its manufacturing sector grew at 8.33% between 2021-22 and 2023-24. Yet, a significant impediment is the central government's increasing fiscal centralisation and anti-federal policies. The Centre's broader fiscal policies increasingly constrain Tamil Nadu's financial autonomy even as the State demonstrates economic vitality with State Goods and Services Tax (SGST) collections growing 20.12% to ₹35,414.05 crore in H1 2024-25, reduced fiscal allocations post-GST and higher cesses continue to cut mandated devolution. More concerning is the refusal of development funds to Opposition-ruled States as a form of political pressure.

Regional resistance to national relevance
These challenges highlight a broader strategic imperative for Tamil Nadu's ruling alliance. Sustaining its distinct model requires moving beyond regionalism toward proactive coalition-building. As one State alone cannot effectively challenge central fiscal policies, coordinated opposition can create national pressure. Facing a hostile Centre, the DMK-led alliance must think beyond regional confines, mobilising opinion among other Opposition-ruled States on shared concerns: delimitation, a two-language policy, and greater fiscal decentralisation.

For the alliance to achieve its aims within Tamil Nadu, its national partners – particularly the Congress and Left – must actively foster a favourable discourse on federalism, social justice and secularism nationally. The political battles in Tamil Nadu are thus not merely about retaining power. They are about preserving a distinct model of governance and development that has delivered tangible progress. The stakes for Tamil Nadu, Indian federalism, and its diverse ethos, could not be higher.

Supporting senior citizens
India is at a demographic turning point. While it continues to draw benefits from a young population, its percentage of senior citizens is expected to nearly double by 2050, reaching close to 20% of the population. This demographic shift will predominantly comprise very old women, especially widows, who often experience high dependency. At the same time, fertility rates have already fallen below replacement level, as noted in the NFHS-5. This means that the working-age population will shrink and the care needs of the elderly will rise. The only way to sustain economic growth in this context is to ensure women – half the population – are healthy, supported, and economically active. Gender equality is no longer just a rights issue. It is a demographic and economic necessity.

If women continue to exit or be excluded from the workforce, the dependency ratio will rise even faster, placing greater strain on fewer workers and undermining fiscal stability. Reversing this trend demands integrated policies that connect health, labour and social protection. India does not lack frameworks or ambition – the slogans are there. What is required is real investment: in public health systems that prioritise women's needs; in care services that redistribute unpaid work; and in policies that see women not as beneficiaries, but as builders of the economy.

The Global Gender Gap Report is not just a ranking. It is a warning: unless India treats gender equality as central to its economic and demographic future, it risks squandering the gains it has worked so hard to achieve.

The end of humanity?
Lives no longer seem to matter whether it is in Gaza or Ukraine. The world watches silently as genocide unfolds, livelihoods are destroyed and hope is extinguished. Across the world, we pride ourselves on our technological progress, but empathy, morality and life's true purpose are eroding.

Senthil V. Gunaseelan, Hyderabad
Letters emailed to letters@thehindu.co.in must carry the postal address.

View India's Gender Gap Report ranking as a warning

India is now a global economic power, a digital innovator, and home to the world's largest youth population. But the World Economic Forum's Global Gender Gap Report (2025) is a sobering reminder that when it comes to gender equality, India remains far behind.

Structural issues

India ranks 131 out of 148 countries, with particularly low scores in economic participation and health and survival – the pillars essential for meaningful gender parity. These are not just social indicators. They are signs of a structural failure holding back national progress.

Despite progress in educational attainment, India continues to struggle in ensuring women's health and autonomy. The report shows that India's sex ratio at birth remains among the most skewed in the world, reflecting a persistent son preference. The healthy life expectancy for women is now lower than men's.

Such outcomes point to chronic neglect in reproductive health, preventive care and nutrition, especially for women from lower-income and rural backgrounds. Increased Budget allocations for health, especially at the primary care level, are a necessity to improve women's well-being and their access to basic services, such as education and health care. Without good health, economic inclusion becomes impossible. Nearly 57% of Indian women in the 15 to 49 age group are anaemic – as reported by National Family Health Survey (NFHS-5) – which reduces their ability to learn, work, or carry pregnancies safely. Such a widespread and correctable issue is emblematic of the broader failure to treat women's health as a national development priority.

India ranks 143rd on the Economic



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India must treat gender equality as central to its economic and demographic future

Participation and Opportunity subindex. Women continue to earn less than a third of what men do, and female labour force participation remains stubbornly low. The McKinsey Global Institute, in 2015, had projected that closing gender gaps could add \$770 billion to India's GDP by 2025. Yet, in 2025, India appears to have lost out on the opportunity. At the current pace of progress, it may take over a century to close the global economic gender gap – and India lags behind even that trajectory.

A sidelining

This is not just about employment numbers. Women remain busy in informal and subsistence work and are grossly under-represented in decision-making spaces – from boardrooms to budget committees. The result is a policy ecosystem that repeatedly sidelines women's real realities. The burden of unpaid care work continues to be a major drag on women's time and agency. Indian women perform nearly seven times more unpaid domestic work than men, as highlighted by the Time Use Survey. Yet, this critical labour remains invisible in national accounting and underfunded in public policy.

Investing in care infrastructure such as childcare centres, elder care services and maternity benefits would not only ease this burden but also enable millions of women to enter or re-enter the workforce. The vacuum in these services reflects both a gender and an economic blind spot.

Central and State governments must begin to account for unpaid care work in their economic and social policy frameworks through time-use surveys, gender budgeting, and direct investment in care infrastructure. India can look to countries such as Uruguay and South Korea, which have

begun integrating care economies into their development plans, with positive results.

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LETTERS TO THE EDITOR

Bihar and the ECI
Bihar is a State that has been plagued with corruption and poor administration for decades. Therefore, any exercise that

will result in change for the better must be encouraged. This must also be supported by robust law enforcement and a clean administration. The Election

Commission of India must ensure that its special intensive revision of electoral rolls is a success.

Manas Agarwal,
Ghaziabad, Uttar Pradesh

The end of humanity?
Lives no longer seem to matter whether it is in Gaza or Ukraine. The world watches silently as genocide unfolds,

livelihoods are destroyed and hope is extinguished. Across the world, we pride ourselves on our technological progress, but empathy, morality and life's

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THE IDEAS PAGE

Our times, their words

Indians aren't 'Boomers', 'Millennials', 'Gen Zs'. We must find our own language to describe ourselves at different moments and stages



MADHU BHAVARAJU

MILLENNIALS, GEN Z, Boomers. These tags have become so embedded in our vocabulary that we seldom question them. They're used in marketing decks, recruitment discussions, and even family WhatsApp debates. But their origins are distinctly American. The "Boomers" emerged from post-World War II prosperity in the US. "Gen X" from the disillusionment of the Cold War. "Millennials" came of age during the tech boom. These markers are born from Western economic, social, and political events.

US-based frameworks don't account for the complex social, economic and cultural factors that play out in India. An 80-year-old "Boomer" in the US is very different from an 80-year-old in India. This is because India's story is different. It is a nation where the pace and nature of change defy imported frameworks.

The same household often contains people born in different Indias — an Independence-era grandparent, a liberalisation-era parent, and a child who is fluent in the language of reels.

We need a generational framework that reflects our own reality. One that is shaped by Independence and post-Independence idealism, by black-and-white Doordarshan and colour cable TV, by the 1991 liberalisation and the 2010s internet boom.

A framework that captures India's own unique and eventful journey over the last 75-plus years. Here's an attempt to decode India through five homegrown generations:

The first generation (1940-1960): Their defining traits are a scarcity mindset, frugality, and nation-building. This is the generation of Independence and Partition. Of handmade goods, ration lines, and radios. They witnessed wars, food shortages, and the slow churn of the socialist economy. Their icons were J R D Tata and M S Subbulakshmi.

They placed immense value on institutions such as LIC or HMT — brands that stood for trust and self-reliance. For them, ownership meant pride. Travel was rare and mostly by rail. They taught us "Jugad" — not as a hack, but as a necessity.

The middle generation (1960-1975): This generation's defining trait is that they were aspirational, but restrained. They grew up waiting: Waiting for milk, gas cylinders, scooters, jobs and opportunities. They were used to delayed gratification and their dreams often went unfulfilled.

Icons ranged from Amitabh Bachchan to Rakesh Sharma. Brands like Nirma and Bata dominated consumption. Foreign travel meant migration out of India. This is the generation that taught us to "study hard" so we could escape the system they were stuck in.

The post-liberalisation generation (1975-1990): Their defining traits were a sense of dual identity, with one foot in the old India, one in the new. Cable TV, the cola wars, Sachin Tendulkar, Shah Rukh Khan. This was the generation that saw the first PCs and dial-up internet. They grew up on Doordarshan and graduated to MTV. They were the first to experience choice. They



C R Sasikumar

have a strong brand affinity and will pay for quality. Brands like Levi's, Coke, and Maruti became badges of identity.

Taste behaviour slowly changed to budget airlines and international vacations. They were the first to see India go from scarcity to abundance and they remember both.

The tech generation (1990-2010): This generation embodies the Americanised digital native, with less baggage, more choice. This is the generation of smartphones, Instagram, and global exposure. They grew up with Facebook and YouTube.

Their icons are Virat Kohli, Elon Musk and Deepika Padukone. They value convenience over brand loyalty and experience over ownership. They travel to Insta-worthy places and stay in Airbnbs. They are India's first truly digital consumers but also the most distracted.

The Indian Gen Z (Post-2010): This generation's defining traits are native internet fluency and cultural confidence. They don't know a world without smartphones. They are growing up with ChatGPT tutors and influencers. The big cultural change is that their worldview is shaped by social media influencers.

They don't just consume content, they create it. They expect brands to play by

Any strategy to connect with the people needs to account for cultural memory, not just age. A 40-year-old in India is not the same as a 40-year-old in the US. The reference points, anxieties, and aspirations are different.

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their rules. They will shape a future of creator-founded D2C (direct to customer)-first brands.

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Policy makers designing pension plans or digital literacy schemes need to understand generational mindsets shaped by tough times, not purely income brackets. EdTech companies need to speak to parents or grandparents who fear technology and children who are digital natives. Consumer brands must evolve rapidly to catch up to internet native customers who will soon become primary decision makers with big spending capacity.

India has seen major events from Independence to wars to socialism to economic stagnation to growth. At the level of the family unit, we have changed from large joint families to solo living within two generations.

We've lived many lives in a single lifetime. We deserve to define those lives on our own terms and not borrowed ones.

The writer is founder, The Brand Ignition Co

WHAT THE OTHERS SAY

"No one should count on Mr Trump remaining aggrieved by Russia for long, still less on that producing significant action." — THE GUARDIAN

Farm crisis, Made in China

Beijing is weaponising fertiliser exports, but Centre has shown little urgency to help farmers



PAWAN KHERA

I WAS in Bihar last week. A young farmer named Raju Singh greeted me with folded hands. But his smile didn't quite reach his eyes. "Sir, bijli kabhi hai, kabhi nahi. Ab DAP (Di-ammonium Phosphate) bhi gaya. Ab bolye, kya ugayein? Kyu ugayein?" (The power supply is erratic. Now even DAP supplies have stopped. What do we grow now?) The question, "Why even farm?" should give nightmares to policymakers in Delhi. When farmers stop wondering what to grow and start asking why, we are not facing an agricultural crisis. We are staring at an abyss of depleting national morale.

Raju isn't alone. Across Bihar — in Siwan, Samastipur, Darbhanga — I heard versions of the same story. Farmers queuing up for fertiliser and being told to "wait", while private agents jack up prices under the counter. Some bought DAP at Rs 1,750 a bag — Rs 400 above the notified price — according to local mandi reports. Others simply gave up.

Fertiliser stock levels in India are nearly half of what they were at the same time last year. With such limited availability, prices are skyrocketing. The decline is largely due to China's informal ban on fertiliser exports to India. Despite the absence of a formal notification from their government, customs authorities and port officials in China have stopped clearing fertiliser shipments destined for India.

India is the largest importer of DAP in the world, the second-most used fertiliser in the country after urea. China has historically been the top exporter of DAP to India. Eighty per cent of India's specialty fertilisers — crucial for high-value horticultural crops like fruits and vegetables — also come from China. As the kharif sowing season (June-July) is underway, the shortage of DAP and specialty fertilisers is back-breaking for Indian farmers.

The government has shown no urgency. It has repeatedly raised slogans of *Atmanirbhar Bharat*. But this spirit of self-reliance is hardly reflected in primary sectors like agriculture. We are told to blame global forces for the disruptions, but this isn't a global halt. This ban is exclusive to India.

Why the ban? China has a tendency to weaponise trade to solve territorial disputes. In 2010, a collision between a Chinese fishing boat and Japanese coast guard vessels near the disputed Senkaku Islands (known as the Diaoyu Islands in China) led to the detention of the Chinese captain by Japan. In response, China halted rare earth exports to Japan, although this was not officially announced. India, of course, has its own unspoken territorial dispute with China. This is China's way of arm-twisting India into submission. The Narendra Modi government is yet to call out China.

At the time of the dispute, Japan, too, was heavily reliant on China for its rare earths. The writer is chairman, media and publicity department, AICC

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LETTERS TO THE EDITOR

WE NEVER LEARN

THIS REFERS TO the editorial, 'A bridge falls' (IE, July 11). It is truly disheartening that while ancient Indian bridges and roads still stand strong, those built only a few years ago collapse, killing innocent people. Despite India's progress in fields like space and sports, such internal failures expose deep weaknesses in our system. Bridges and railway tracks must be inspected at least quarterly, yet authorities continue to neglect this. Taxes are paid diligently, but often vanish into inflated salaries, air-conditioned offices, and lavish perks — while infrastructure crumbles. Corruption is the real culprit, eating into both safety and governance. Superficial repairs won't fix broken bridges and systems.

Eksha Srivastava, Patna

SC'S INTERVENTION

THIS REFERS TO the report, 'SC lets EC revision continue, suggests adding Aadhaar, ration, voter card to list of documents' (IE, July 11). The Supreme Court's serious questions to the Election Commission (EC) in respect of the urgency with which it was conducting the Special Intensive Revision (SIR) of the electoral rolls in the poll-bound state of Bihar has exposed the partisan attitude of the EC in favour of the ruling BJP. It is a tragedy that the EC, which is expected to facilitate democratic participation in its entirety, has ventured into a partisan exercise like the SIR. The advice of the SC to the EC is as good as a stay on the process.

Tharicus S Fernando, Chennai

A POLITICAL TOOL

THIS REFERS TO the editorial, 'Nobel Prize' (IE, July 11). The recent nominations of US President Donald Trump for the Nobel Peace Prize by Israeli Prime Minister Benjamin Netanyahu and Palestinian Field Marshal Asif Munir are less endorsements of diplomacy and more indictments of the Prize itself. Once a symbol of global moral aspiration, the Nobel Peace Prize now risks becoming a tool of political theatre. Trump's record, marked more by brinkmanship than resolution, hardly reflects the spirit of Alfred Nobel's vision, to reward rhetoric over results to the end of the meaning of peace.

K Chidambaram Kumar, Bengaluru



K J ALPHONS

I AM NOT a defence expert, even though I was a keen member of the Parliamentary Consultative Committee on Defence. But, can anyone call themselves a defence expert after Operation Siddhant's Web? Carried out by Ukraine, it saw 117 drones, each reportedly costing less than Rs 50,000, apparently destroying or damaging 41 Russian aircraft — most of them strategic cruise missile carriers — including at a location 4,000 km from the Ukrainian border. In another instance, several US B-2 stealth bombers flew thousands of kilometres, passed over enemy territory, bombed Iranian nuclear facilities and returned safely, undetected. Experts will propose dramatic changes in defence strategy, just as the art of war changed with the invention of gunpowder, machine guns, fighter planes, rockets, nuclear bombs, missiles etc. In light of recent developments, I have the following observations on future planning.

First, fighter planes are flying ducks, and horribly expensive, too. Earlier, fighters were lost in dogfights; now, they can be shot down in one's own air space from enemy

Preparing for a future war

India should focus on UAVs, not fighters or tanks

territory. It is foolish to use them when a Rs 50,000 drone can do the job much better at a fraction of the cost. It could be argued that a fighter plane can carry much bigger payloads, but with precision munitions, this is no longer so critical. In any case, unmanned aerial vehicles (UAVs) can be designed to carry payloads of any size. Besides, for precision delivery of large payloads, missiles are the best. Our Agni missiles can hit almost anywhere in the world accurately. They are our pride and the best demonstration of *atmanirbharata*; we owe a lot to former president A P J Abdul Kalam and Tessa Thomas — the DRDO's former director general of aeronautical systems and project director for Agni-IV — for them.

Even stealth fighters have no place in future warfare — sooner rather than later, better radar technology or satellite-based observation techniques will be developed to detect them. The DRDO and HAL should stop wasting resources on fighters. Only transport planes and transport choppers will be relevant in the future. Even reconnaissance planes will be obsolete, with

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satellites doing a much better job. Second, aircraft carriers are sitting ducks for UAVs. A torpedo can also sink even the most protected carrier. And protecting one requires a lot of paraphernalia — it's like an emperor who needs to be closely guarded. They are also enormously expensive: The USS *Gerard R Ford* cost \$13.3 billion to build. India has two aircraft carriers: INS *Vikramaditya* and INS *Vikrant*. *Vikramaditya* has a displacement of 44,500 tonnes and *Vikrant* around 43,000. Both cost a fortune. China has three and is building one more. Their only purpose is to carry fighter planes and helicopters. They are good for national pride and not much else — don't build more. The money can be used to develop equipment that is far more critical.

Third, tanks are expensive. They can be immobilised with drones, and there are a variety of shells that can destroy any battle tank. They can easily be replaced with more effective and less expensive equipment — don't waste money on them.

Fourth, future wars will be satellite/UAV-driven conflicts. Not only will these track

everything, they will deliver the munitions as well, including nuclear warheads. Spend lots of money on these.

Over all of the world, the best defence equipment is manufactured by the private sector. Prime Minister Narendra Modi has focused on the development and production of defence equipment locally. He knows what he wants. It has produced some good results like the Akash air defence control and reporting system, designed and produced by BEL, which was very effective during Operation Sindoor. The DRDO's wings should be clipped drastically and it should stick to its areas of core competence, such as missile technology. Let the private sector do the rest, without any supervision by the DRDO. They will produce world-class products. Give them a free hand and have a large PLI for the sector.

Our armed forces are incredibly competent and we need to give them the best for future warfare.

Alphons is a former Union minister and author of 'The Winning Formula'

10 The EDITORIAL PAGE

The Indian EXPRESS

FOUNDED BY
RAMNATH GOENKA

BECAUSE THE TRUTH INVOLVES US ALL

LISTEN TO THE COURT

EC must not stand on prestige. At stake is the integrity and credibility of the process it has fine-tuned so painstakingly

THE SUPREME COURT has not stayed or stopped the Election Commission's Special Intensive Revision of electoral rolls in Bihar, an exercise that has stoked confusion on the ground and raised spectres of disenfranchisement. But that's not the most important message after the EC's day in court Thursday. It is, instead, this: The Court has flagged important issues that the Commission would do well to heed and act upon, before it files its counter-affidavit in a fortnight — the SC is scheduled to hear the matter again on July 28. Even as the Court has framed its concerns with a respectful tentativeness, given that it is addressing a constitutional authority, the EC must know that they resonate widely. It needs to ask itself whether the electoral roll revision exercise — unprecedented not in itself, but for asking for documentation at the stage of enumeration, for shifting the burden of proof onto voters, and for disregarding the sanctity of existing electoral rolls — can be carried out according to due process with only months to go before the Bihar election. It needs to consider seriously the Court's suggestion that, "in the interest of justice", it should include more accessible and ubiquitous options like the Aadhaar card, ration card and voter ID card in its list of required documents. The Court has asked the EC to give reasons for not including these. The EC must know that the onus is now on it to prove that it is acting in good faith.

It is ironic that the EC, for long seen to be one of India's most trusted institutions, should find itself in the dock. The reforms initiated and supervised by the EC in a sprawling country of staggering diversities have ensured that the Indian election sets the gold standard for the conduct of free and fair polls, and for ensuring that no voter is left out, every vote is counted in. Now, that institution must show that it also listens, that it knows when not to stand on prestige. For, at stake is its own record and legacy, and more importantly, the integrity and credibility of the process that it has refined and fine-tuned so painstakingly. Apart from suggesting the inclusion of three documents in the EC list, and pointing out that the tight timeline creates practical difficulties, including in the matter of providing a reasonable opportunity for a hearing in cases of deletion, the Court has also drawn attention to the question of remit. It is the Ministry of Home Affairs, not the EC, the SC has rightly said, whose task it is to ascertain or verify citizenship.

But most of all, the EC must listen to the Court because it is giving the Commission another opportunity to listen to the voice of India's voters. Ground reports in this paper have captured some of those voices, especially in vulnerable sections that are more likely to fall through the cracks of a complicated bureaucratic exercise. The EC must listen to the undocumented people, the poor and the migrants, the SCs and STs and extremely backward castes, and to the women who move from their parents' homes to their marital homes. It must update and clean the electoral rolls, of course, and make them more accurate. But it must do so without making the process arduous for the people, and without stoking their anxieties.

CALL BACK THE BILL

Maharashtra Special Public Security Bill will aid state over-reach, criminalise dissent. Fadnavis government must step back

THERE ARE SALIENT differences between Left Wing Extremism (LWE) — which has been flagged by successive governments at the Centre and in the states as a grave internal security threat — and "urban Maoism". The former, an insurgency against the state, has targeted security forces, government officials, civilians and politicians and invited a whole-of-government response that includes armed engagement, development work and a host of other policies and actions. The latter is a political trend of relatively recent vintage that has been deployed controversially against activists, students and academics who have expressed dissent with the dominant ideology or political establishment. Disturbingly, the Maharashtra Special Public Security Bill, passed by the lower House, conflates the two. Its loosely defined scope and stringent provisions raise spectres of state overreach and misuse. Armed with vague and opaque definitions, it invites the danger of blurring the lines between extremist violence and non-violent dissent.

The Bill fails the test established by the Supreme Court as far back as 1962 in *Kedar Nath Singh vs State of Bihar*. Words and ideas, no matter how critical of the government, even state itself, do not constitute sedition or a crime unless they can be directly linked to an incitement to violence. The Bill provides for a jail term of up to seven years for "any action" that is "spoken or written" or "by visual representation" that can be construed as a "danger to peace and tranquillity" or interferes with "maintenance of public order", and it allows for attaching the property of an accused. In this respect, it is more stringent than the most controversial sections of the Prevention of Money Laundering Act. Democracy, in practice, is the right to speak and write, to draw and debate, to disagree and criticise. The Constitution recognises this in its guarantees of the fundamental rights to speech and expression. The Special Public Security Act violates that promise in letter and spirit.

Chief Minister Devendra Fadnavis, who tabled the Bill, said that it was needed to counter organisations that are "brainwashing the youth". He should have more faith in the maturity of the young. He spoke of how LWE influence is waning in the state, as in much of the "red corridor", which, he said, is down from four districts to two blocks. Why, then, raise the bogey of "urban Maoism"? It is difficult not to see the Bill as an attempt to arrogate more powers to the state and to help it to criminalise political-ideological opponents. The Maharashtra government must rethink the law.

MAN AT REST

At a time when burnout is a badge of honour, Hugh Grant's Wimbledon nap is a reminder of the body's limits

WAS IT THE sun-dappled ambience, the strawberries and cream, the frustration of Flavio Cobolli's unforced errors against Serbian Novak Djokovic on Centre Court or simply the crushing weight of being a 64-year-old man in the third act of a very public life? Whatever the reason, Hugh Grant deserves empathy. There he was, in the royal box at Wimbledon, seated behind Queen Camilla, and flanked by Britain's well-dressed and well-rested, watching the men's singles quarter-finals, when the actor did something quietly radical: Head at a tilt, eyes closed, utterly unbothered, he took a nap.

The internet, of course, did what it does best — it giggled, memed, and gently roasted. But far from a gaffe, Grant's power nap was a vibe. At a time when hustle culture is practically a moral code and burnout a badge of honour, his shuteye was a tiny, silent rebellion, a reminder that in a world obsessed with presence and polish, the human body sometimes refuses to cooperate with the agenda. That it may cock a snook at the tyranny of being always-present and simply opt out. It makes Grant a perfect ambassador for existential exhaustion. Because, honestly, is there anyone who hasn't been in his shoes? After a hard day's work, settling down with a book, or to a movie to slough off the day's drudgery, who hasn't found their eyes glazing over mid-sentence, or the soundtrack of the movie fading to a pleasant drone in the background?

So praise be to Grant for serving up an unexpected ace. In that small, delicious moment, he didn't merely catch forty winks — he made an elegant case for surrender. Not to laziness, but to limits. To the body's quiet wisdom over society's relentless performance metrics. Wimbledon had its tennis. The perpetually sleep-deprived discovered a leading man, not of action, but of rest.



MANISH SABHARWAL

AN AUTOIMMUNE DISEASE occurs when your body's immune system treats its own healthy tissues as invaders and attacks them. America's policies currently targeting its three powerful muscles — universities, companies and immigration — create short-term pain for India in remittances, student enrolment, manufacturing jobs, foreign investment and exports. While these attacks feel like a passing shower, it's too early to conclude they aren't the climate change of Pax Americana ending. Regardless of how politics unfolds in America, India must seize the long-term economic opportunities by making itself stronger through a 180-day plan for deregulation for employers, decentralisation of power and deepening of human capital.

Some people date Pax Americana — US dominance in the world order — to World War II. I prefer January 1992, when President George H W Bush, referring to the Soviet Union's collapse, said, "The last year has seen changes of biblical proportions. By the grace of God... a world once divided... now recognises one sole end and preeminent power, the United States of America." Despite this biblical hubris — and 9/11, two wars, a financial crisis and Covid since — the US has dominated in digital innovation, new drugs and stock market growth because it stole the best people in the world, made public investments in basic science and its companies globalised their supply chains. But America is now pouncing on all three.

America's universities are home to 50 per cent of Nobel Prize winners. Funding from the National Institutes of Health contributed to 99 per cent of all drugs approved between 2010 and 2019. In biotech, US government funding accounted for 38 per cent of total investment in 2024, almost as much as all global venture capital combined. Global consumers of medicine and information technology innovations (chips, internet, and GPS) have benefited from generous US government funding that supported cutting-edge basic science research and grants to academic scientists. Some of the backlash against universities is earned as some intolerant humanities professors with physics envy gift-wrapped their disciplines as social join FREE Telegram Channel <https://t.me/+JUYKQAFHBAwMGQ1>



RUCHI GUPTA

AS THE US and China drive a never-ending AI competition, and the EU asserts leadership on AI regulation, India has articulated its ambition to lead in technology and shape global AI governance. With its democratic legitimacy and digital capacity, India is positioned to represent the Global South in AI forums. However, without a comprehensive, politically grounded national strategy, it risks falling behind in technological capability and managing the attendant strategic and social transformations.

The India AI Mission, approved last year with a budget of over Rs 10,000 crore, is a welcome step. But it is a mission without a mandate. Housed as a division of a Section 8 company under the Ministry of Electronics and Information Technology, it is led by a bureaucrat. Operating without a Cabinet-endorsed national strategy, it lacks both the political heft to drive whole-of-government coordination or signal the long-term political commitment required to align public and private actors. The US, China, the UK and the EU anchor their AI efforts in formal, Cabinet-endorsed national strategies with clear roadmaps and timelines.

This governance gap is critical because India faces structural deficits that impede its AI ecosystem, which cannot be overcome through incremental approaches. The Indian R&D base remains relatively shallow. Our universities are underrepresented in global AI rankings; the pipeline of AI-specialised PhDs is limited; collaboration between academia and industry is weak. India continues to lose top-tier AI talent to global hubs.

In the private sector, India's IT industry remains oriented toward services. Research investments are modest relative to international peers. Join FREE WhatsApp Channel <https://www.whatsapp.com/channel/0025Vn2YRb0R8GJK016k0d0F>



The US is undermining what made it great. India will suffer short-term pain — it also has opportunities

The political popularity of America's economic irrationality — Make America Great Again, feels like Make America White Again — suggests healing will take time. But Indians showing schadenfreude at America's challenges should pause. Despite our short-term pain from the US's actions, its democracy remains the best partner for India's students, emigrants, investment needs and exports. Suppose the government-funded American research engine in basic science suffers. It's hard to imagine the Indian state or pharma, software, and manufacturing companies responding with resources of the same intensity and impact.

sciences, ignoring Richard Feynman's warning that physics would be impossible if electrons had feelings. This conversion of economics to mathematics, political science to statistics, and sociology/anthropology to racism paralleled a crisis in peer-reviewed, journal-published academic papers around replicability, scalability, and generalisability. It's also unclear whether a private university like Harvard, with an endowment of \$50 billion, should take \$80,000 per student per year in government funding.

President Donald Trump's economically illiterate advice to Walmart, a hyper-efficient American retailer with 3 per cent profit margins, to "eat" its import tariffs is a long way from the global supply chains described in the new book *Apple in China* by Patrick McGee. Ignoring the author's patronising and unfair portrayal of Apple's motivations, the book insightfully demonstrates how the globalisation of manufacturing supply chains became the most significant factor in reducing global poverty by attracting investment, training managers and accelerating productivity. India came late to manufacturing supply chains; only one in 10 of our workers works in a factory. However, China's recent dismissal of Deng Xiaoping's economic genius presents India with a manufacturing opportunity to attract factory refugees despite America's tariff drama.

If demography is destiny, immigration has ensured America doesn't face the problems of Japan (adult diapers outsell baby diapers) or China (Nigeria may have more people by 2060). Approximately 14 per cent of Americans are foreign-born, and immigrants, including their US-born children, account for 27 per cent of the country's population. These numbers conceal the disproportionate contributions of Indian immigrants to new company formation, university teaching, scientific research, technology innovation, and taxes. India's improbable success in two Indian industries — economists never envisioned poor countries exporting software and medicines — benefited from America's skilled worker visa regime and brain circulation. A new book by Sriragh Raghavan of Ashoka University on the India Gandhi years suggests they represent

conjoined crises of hegemony, representation, and governance. This may also explain America's political backlash. Universities became idealists with illusions. The geographic (rural) and sectoral (manufacturing) concentration of wage declines were ignored. Liberals denied that illegal migration would hurt legal migration, a path to citizenship is not necessary for a path to work. And migrants are easier to vilify than technology.

The political popularity of America's economic irrationality — Make America White Again, feels like Make America White Again — suggests healing will take time. But Indians showing schadenfreude at America's challenges should pause. Despite our short-term pain from the US's actions, its democracy remains the best partner for India's students, emigrants, investment needs and exports. Suppose the government-funded American research engine in basic science suffers. It's hard to imagine the Indian state or pharma, software, and manufacturing companies responding with resources of the same intensity and impact. Let's compare America to the alternative: imagine the tyranny and soullessness of a global order hinged on China.

Every problem is an opportunity. India must capitalise on this one in three ways. First, cut employer compliance, filing and criminal provisions. Second, shift some of Delhi's power (funds, functions and functionalities) to state and city governments. Third, while the troubles of America's Ivy League universities are probably temporary, granting *poorna swaraj* to IISc, IITs, IIMs, and Ashoka to innovate, disrupt and teach would accelerate their disruption of global university rankings.

All three reforms are hard. But as a song from the movie *Pink* reminded us, *Jo tujh se lipi bediya samajh na inko vestra tu je bediyaan pighal ke banale in ko shastra tu* (Don't mistake the chains that bind you for clothes! Melt these chains into weapons). In policy, there is no such thing as being too late, but there is a "fierce urgency of now". Success is far from guaranteed, but the moment feels auspicious.

The writer is co-founder of TeamLease Services

MISSION WITHOUT A MANDATE

India's AI ambitions need bipartisan consensus. Parliament must be brought in

Venture capital majors are frank: They see India as a consumer market, not a deep-tech innovator. Funding remains skewed towards consumer tech, not foundational research. Bridging these deficits will require a coordinated transformation, guided by a national strategy, anchored in political consensus and designed to provide long-term policy stability. That consensus is what India's current approach lacks.

Without parliamentary anchoring, India's governance risks remaining fragmented and vulnerable to administrative shifts. The consequences of this democratic deficit are evident. Important debates around strategic autonomy, use of public data, energy demands and national security implications have received short shrift in the largely technocratic policy discussions. This absence also undermines India's international credibility. While India's leadership of the Global Partnership on AI signals global ambition, other

democracies will look at whether its domestic governance aligns with its aspirations abroad.

The path forward is clear. India needs a Cabinet-endorsed National AI Strategy — presented to Parliament — that sets out a vision, an actionable roadmap, and mechanisms for democratic accountability. This strategy must establish an empowered coordinating authority with a whole-of-government mandate; align R&D, industrial policy, and security strategy; and create frameworks for public engagement and parliamentary oversight. AI is not just another technology. It is a general-purpose transformation that will reshape national security, economic structures and the social contract itself. Mandating that transformation requires policy stability and legitimacy — built through broad-based national deliberation.

India's strengths are undeniable: A young population, a competitive digital economy, and the world's largest democracy. These assets position India to chart an AI trajectory that combines innovation with inclusion. But that future will not emerge by default. The window for action is closing. As global AI governance frameworks take shape and capabilities advance rapidly, India must move beyond piecemeal initiatives toward a comprehensive strategy. AI governance must be treated as a national strategic priority — grounded in democratic consensus — if India is to shape an AI future aligned with its national interests and global leadership aspirations.

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Gupta is executive director of Future of India Foundation. This article draws from the Foundation's report, *Governing AI in India: Why Strategy Must Precede Mission*

JULY 12, 1985, FORTY YEARS AGO

ASSASSINATION FOILED

THE SRI LANKAN government said that a plot by Tamil separatists to assassinate President Junius Jayewardene was foiled when the police discovered 120 kg of gelignite wired to a timing device in a parked van. A statement by the Information Minister said the alleged conspirators "told police that the target was to be the presidential secretariat". The government said a group called the Eelam Revolutionary Organisation of Students was responsible. The five militant groups and the TULF delegation participating in talks with

the Sri Lankan government condemned the alleged attempt and in a joint statement, denied involvement.

US ARMS PAKISTAN

THE UNITED STATES is rushing to Pakistan 100 AIML sidewinder air-to-air missiles and an unspecified number of shoulder-fired surface-to-air Stinger missiles worth \$8.5 million. In addition, a Pakistani request for ground or airborne radar for improved detection and interception of Afghan aircraft remains under study. A state department state-

ment said that the defence equipment is "in response to repeated violations of Pakistan's airspace and territory by Communist aircraft approaching from Afghanistan".

CJI RETIRES

CHIEF JUSTICE YV Chandrachud retired after seven years in the post and 25 years as a judge. Justice P N Bhagwati, the senior-most judge of the Supreme Court, will be sworn in as the new Chief Justice. While Chandrachud had the longest term as CJI, Justice Bhagwati will be one of the shortest — one and a half years.

What Maharashtra's 'urban Maoism' Bill says

Bill passed by voice vote in Assembly targets 'unlawful activities of left-wing extremist organisations'. First introduced last year, Bill has seen 3 amendments

MOHAMED THAYER
MUMBAI, JULY 11

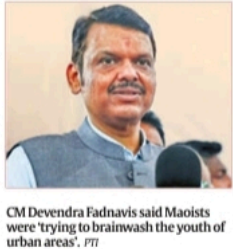
THE STRINGENT Maharashtra Special Public Security (MSPS) Bill, which seeks "to provide for effective prevention of certain unlawful activities of left-wing extremist organisations or similar organisations", was passed by the state Assembly by a voice vote on Thursday.

The MSPS Bill has been debated widely ever since it was first introduced in the monsoon session of the state legislature last year by Chief Minister Devendra Fadnavis, who was Deputy Chief Minister at the time. The Opposition has raised concerns over the definition and interpretation of some of the terms and clauses in the Bill.

The Bill will now be introduced in the Legislative Council where it is expected to pass as well. It will then be sent to the Governor for his assent, following which it will become law.

Why did the Fadnavis government introduce the Bill?

The statement of objects and reasons of the Bill states that the Government of Maharashtra has been facing a serious threat to its security and public order from the activities of left-wing extremist organisations. These organisations are engaged in unlawful activities, including recruitment, training, and propaganda, which are aimed at overthrowing the Government of Maharashtra and establishing a communist regime in the state.



CM Devendra Fadnavis said Maoists were 'trying to brainwash the youth of urban areas'. PTI

whether by committing an act or by words either spoken or written or by sign or by visible representation or otherwise, which constitute a danger or menace to public order, peace and tranquillity, or interferes with the maintenance of public order, or interferes with the administration of law or its established institutions and personnel; or is designed to overawe by criminal force or show of criminal force to any public servant, etc.

Indulging in or propagating, acts of violence, vandalism or other acts generating fear and apprehension in the public; encouraging or preaching disobedience to established law and its institutions; or collecting money or goods to carry out any of these unlawful activities are also included.

What happened when the Bill was first introduced last year?

The Bill was first brought at the fag end of the 2024 Monsoon Session of the Assembly. The day after the Bill was tabled, the Assembly was prorogued and the Bill was not passed.

After the Assembly elections, following which Fadnavis became Chief Minister, the Bill was introduced in December last year. Fadnavis said that since many organisations

had expressed apprehensions, the Bill would be sent to the joint select committee, and taken up again after all views and opinions had been considered.

What changes were suggested by the Joint Select Committee?

The Joint Select Committee, comprising 25 members from both houses of the legislature, was headed by BJP leader and state Revenue Minister Chandrashekhar Bawankule. The Committee held five meetings between March 4 and June 26 this year.

The Committee received more than 1,200 suggestions and objections from various stakeholders including opposition parties, NGOs, and citizens until the April 15 deadline. Some objections were raised about open-ended definitions of terms like "unlawful activity", some like the People's Union for Civil Liberties (PUCI), asked for the Bill to be withdrawn in its entirety.

Eventually, the Committee made a total of three amendments to the original Bill.

■ The first amendment was regarding the "long title and preamble". Initially the long title and preamble read: "A Bill to provide for the effective prevention of certain unlawful activities of individuals and organisations

and for matters connected therewith...".

The introduction to the amended Bill says that "since the Bill intends to destroy Urban Naxalism, the Committee opined to bring clarity on this aspect", and changed unlawful activities of individuals and organisations to "unlawful activities of Left Wing Extremist organisations or similar organisations...".

■ The second amendment was to clause 5(2) of the Bill, which says that "the Advisory Board shall consist of three persons who are or have been or qualified to be appointed as judge of the High Court. The Government shall appoint the members and designate one of them as the Chairperson".

The Committee suggested that the Board shall consist of a chairperson who is or has been a judge of the High Court, and two members of which one shall be retired judge. Some then circumvented Mount Kailash, a much more arduous 52-km trek that takes around three days to complete.

■ The third amendment was made to clause 15(2). Instead of the acts defined under the Bill being investigated by a police officer not below the rank of Sub Inspector, it was suggested that it should be entrusted to officers of the rank of Deputy Superintendent of Police.

EXPLAINED LAW

What are the provisions of the Bill?

The Bill gives the government the power to declare any suspect "organisation" as an "unlawful organisation". It prescribes four offences for which an individual can be punished: (i) for being a member of an unlawful organisation, (ii) when not a member, for raising funds for an unlawful organisation, (iii) for managing or assisting in managing an unlawful organisation and, (iv) for committing an "unlawful activity".

These offences carry jail terms of two years or fine.

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EXPLAINED FASHION

'THE MOST FAMOUS BAG OF ALL TIME': HOW THE BIRKIN CAME TO BE

THE FIRST-EVER Birkin handbag sold for a whopping 8.6 million euros (\$10.1 million) on Thursday, becoming the second most expensive fashion item ever sold at an auction (after the ruby red slippers from *The Wizard of Oz*, which sold for \$32.5 million in 2024).

Named after the late actor Jane Birkin, for whom French fashion houses Hermès created it, the auctioneer called accessory the "the most famous bag of all time".

(The Birkin bag was notably featured in the 2011 Hindi film *Zindagi Na Milegi Dobara*. The film contained several references to its hefty price tag.)

A practical luxury

Hermès exclusively commissioned the bag for Birkin in 1984, branding it with her initials JB on the front flap, below the lock. The subsequent commercialised version of Birkin's bag went on to become one of the world's most exclusive luxury items, extravagantly priced and with a years-long waiting list.

The bag was born out of an encounter between Birkin and Jean-Louis Dumas, then the head of Hermès, on a flight. Birkin split some of her things on the cabin floor, and asked Dumas why Hermès didn't make a bigger handbag. Dumas sketched a design on an aeroplane vomit bag and soon, sent Birkin her specially-made bag.

"There is no doubt that the Original Birkin bag is a true one-of-a-kind... It is incredible to think that a bag initially designed by Hermès as a practical accessory, has become the most desirable bag in history," said Morgane Halimi, Sotheby's head of handbags and fashion.

Height of French chic

Sotheby's said that several design elements on the handcrafted all-black leather prototype set it apart from Birkins that followed. For one, this was the only Birkin with a non-removable shoulder strap — fitting for the busy life and practicality of the singer, actor, social activist and mother. The bag that Hermès handmade for Birkin also has gilded brass hardware, bottom studs and other features that differ from commercial models.

Birkin's casual, breezy style in the 1960s and early 1970s — long hair with bangs, jeans paired with white tops, knit minidresses and basket bags — still epitomises the height of French chic for many.

Cultural legacy

Birkin kept the prototype for nearly a decade before auctioning it for an AIDS charity in 1994. It was auctioned again in 2000 and has since been in private hands.

Sotheby's said.

"Its presence spans the worlds of music, film, television and the arts" and that "it is a red-carpet staple, a fashion magazine mainstay, and a coveted piece in the wardrobes of celebrities, artists and stylists."

AP

EXPLAINED HISTORY

Kailash-Mansarovar yatra resumes after five years: history of a storied pilgrimage

AISWARYARAJ
DEHRADUN, JULY 11

AFTER A five-year hiatus triggered by the Covid-19 pandemic and extended due to tensions between India and China, the Kailash-Mansarovar yatra has resumed in 2025.

This year, the Ministry of External Affairs chose 750 pilgrims who would be making the storied pilgrimage: five batches of 50 yatis will cross into Tibet through the Lipulekh pass in Uttarakhand, and 10 batches of 50 pilgrims will make the longer but relatively easier journey through the Nathu La pass in Sikkim. The first batches of pilgrims on both routes are currently on their way.

The mountain & the lakes

With an elevation of 6,638 metres, Mount Kailash (Gang Rinpoche in Tibetan) is located in the Ngari Prefecture of the Tibet Autonomous Region, near the tri-junction of India, Tibet and Nepal. To its south on the Tibetan plateau are two lakes: the freshwater Mansarovar (Mapam Yumtso) and saltwater Rakshasthal (Lhanag Tso).

Both lakes and the towering mountain in their background are significant in Hindu, Buddhist, Jain, and Tibetan Bon traditions.

"For Hindus, [Kailash] is the home of the Hindu god Shiva... for Jains it is where their first leader was enlightened; for Buddhists, the navel of the universe; and for adherents of Bon, the abode of the sky goddess Spalmimen," Alice Albinia wrote in her award-winning book *Empires of the Indus: The Story of a River* (2008).

Four major rivers — the Yarlung Tsangpo (which later becomes the Brahmaputra), the Indus, the Sutlej, and the Kamal (later known as Ghaghra, a major tributary of the Ganga) — trace their origins "the watershed of this iconic mass of rock," Albinia wrote.

Mainstreaming a pilgrimage

Despite its age-old sacredness, however, the Kailash-Mansarovar complex was not a popular pilgrimage site till "as recently as the early 1900s," wrote Tibetologist Alex McKay in his book *Kailas Histories: Renunciate Traditions and the Construction of Himalayan Sacred Geography* (2015).



Mansarovar lake with Mount Kailash in the background. Wikimedia Commons



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The actual mountain was visited only by the occasional renunciate and not by ordinary Indian pilgrims. Indeed early Hindu and Buddhist texts clearly stated that Kailas was a heavenly place that could only be visited by advanced spiritual practitioners," he wrote.

This changed after 1904, when Tibet officially opened up to British subjects (including Indians), and courtesy the efforts of a certain Charles Sherring, then the district collector of Almora. Sherring in 1905 undertook an inspection of the Kailash-Mansarovar complex, and in his report recommended improving the pilgrimage route.

In 1906, he would go on to publish a book, *Western Tibet and the British Borderlands*, about the sacred mountain which was a stunning photograph of Kailash on its cover.

According to McKay, this book was an attempt to mainstream the beliefs of a small sect of Shaivite renunciates among the larger Hindu

year. Two months later, the first batch of a total of 60 Indian pilgrims set off for Kailas via Almora and the Lipulekh pass; Subramanian Swamy was among them," McKay wrote.

The pilgrimage, then and now

Pilgrims typically travel to and circumambulate Mansarovar, a 90-km walk that takes between three to five days to complete. Some then circumambulate Mount Kailash, a much more arduous 52-km trek that takes around three days to complete.

C M Bhandari in his book *A Journey to Heaven, Kailas-Mansarovar* (1998) described his pilgrimage in 1997. The Tseti camp, on the western shore of Mansarovar, was the starting point for the circumambulation of the lake, after which pilgrims travelled to Huace, some 30 km to the north. Then they reached the Serlung monastery to the south of Huace, before travelling to Trugo Gompa, on the southern shore of the lake, and returning to Tseti.

The Kailash trek began on the southern side of the mountain, at Tarchen. Pilgrims typically travel clockwise around the mountain, always keeping Kailash to their right. The trek passes through Dirapuk, Dolma La, Zutul Puk, and finally culminates in Tarchen.

According to Bhandari, pilgrims must acclimatise to the high altitude before reaching Tibet. "The arrangement via the Indian route allows almost 10 days of gradual climb from about 3,000 feet at Dharachula to 14,000 feet at Navidhang. This helps the body to get used to trekking in mountains at high altitudes," he wrote.

This year, yatis will stay at Dharachula for one night, then acclimatise at the village of Gunji for two nights, spend two more nights at Navidhang, before journeying through Lipulekh. In Tibet, pilgrims will be spending around a week before returning to Lipulekh.

Due to the construction of motorable roads, the amount of trekking on the Lipulekh route has reduced considerably, down from 27 km in 2019 to only one km this year on the Indian side, Pooja Garbhal, additional secretary of tourism at Uttarakhand, told *The Indian Express*.

On the Nathu La Pass route, which first opened in 2015, the journey is even easier: pilgrims travel the entire 1,500 km from Nathu La to Mansarovar by car or bus.

How a novel initiative helped Tamil Nadu bring down TB deaths in the state

ANONNA DUTT
NEW DELHI, JULY 11

TAMIL NADU has witnessed a dip in the number of tuberculosis (TB) deaths in the state after the rollout of the Tamil Nadu Kasanori Erappilla Thittam (TN-KET), or TB death free initiative, in 2022.

What does the data show?

Due to the initiative, three districts — Dharmapuri, Karur, and Villupuram — witnessed a reduction in the number of TB deaths between 2022 and 2023, according to a paper published in the *Indian Journal of Community Medicine*. The TB death rate in Dharmapuri went down from 12.5% to 7.8%, in Karur from 7.1% to 5.2%, and in Villupuram from 6.1% to 5.2%.

Scientists at the National Institute of Epidemiology told *The Indian Express* that within the six months of the TN-KET pro-

gram, Tamil Nadu saw a dip in the number of early TB deaths by 20% across the state. Two-thirds of the districts in the state documented a 20% to 30% reduction in total deaths in 2024, according to scientists.

Experts say, the program has been successful for two reasons.

One, it uses a quick, easy-to-use tool, which helps a doctor determine whether a patient is severely ill and needs to be hospitalised soon after being diagnosed with TB. The tool does not require any laboratory-based investigations.

Two, the initiative follows a differentiated care model which offers a patient-centred approach instead of a one-size-fits-all treatment.

How does the tool work?

Tamil Nadu health workers use a paper-based triage tool which prioritises patient care based on the severity of the illness. To determine the severity, health workers record five

key parameters for all TB patients in the state.

■ Height and weight of the patient is used to calculate body mass index (BMI) which is fat undernourishment;

■ Swelling of the leg is determined by pressing it for 15 seconds;

■ Respiratory rate per minute is recorded in a sitting position;

■ Oxygen saturation is taken using a pulse oximeter; and

■ It is determined whether TB patients can stand without support.

If a patient has a BMI of less than 14 kg/m², or suffers from respiratory issues, or performs poorly on any of the other metrics, they are tagged as "severely ill". Such a patient is immediately referred for comprehensive assessment and inpatient treatment (care provided in a hospital or in some sort of medical facility).

Note that this paper-based triage tool is simpler than other tools which health

workers have to record 16 parameters of a patient, and send them for laboratory-based investigation. This makes the process of diagnosis at least a week long. Using the TN-KET program's triage tool, a diagnosis can be made within a day.

Since the implementation of the initiative, 98% of the patients diagnosed with TB in Tamil Nadu get examined using the triage tool, and 98% of those confirmed to be severely ill are admitted to hospitals within seven days of diagnosis, according to scientists.

The Tamil Nadu government has also launched a portal called Severe TB Web Application, where once the recorded parameters are entered, one can assess "the probability of a patient dying", Manoj Murhekar, head of the National Institute of Epidemiology, told *The Indian Express*. "This will help guide the health workers to take immediate action and pre-

vent TB deaths," he said.

What is a differentiated TB care model?

The TN-KET is one of India's first initiatives to implement the differentiated care guideline issued by the National Tuberculosis Elimination Programme (NTEP) in 2021. By following a patient-centred model, it provides treatment based on a patient's medical history and medical parameters such as age, weight, and specific disease conditions. It also considers the severity of the disease in all patients diagnosed with TB, and provides comprehensive care to the worst affected.

Combined with a quick examination of TB patients through the triage tool, this model has been highly effective in preventing early deaths of the worst affected patients. Usually, 50% of those who die due to TB, lose their lives within the first two months after being diagnosed.

"Immediate inpatient care can reduce the probability of early death in severely ill

patients by 1% to 4%. Usually, the probability of death in such patients is between 10% and 50%," said Hemant Shewade, senior scientist at the National Institute of Epidemiology, who has studied the implementation of the TN-KET.

Why is this significant?

Currently, India bears the highest burden of TB across the world. With an estimated 28 lakh cases, the country accounted for 26% of the global TB burden in 2023, according to the Global TB report, which was released last year. With 3.15 lakh deaths due to TB in 2023, India accounted for 29% of the global burden, the report revealed.

The success of the TN-KET program has demonstrated that a differentiated care model combined with the use of a simple triage tool could save the lives of TB patients. This initiative can now be emulated by other states, helping reduce the number of TB deaths across the country.

GROUND ZERO



The school van after it was hit by a train at the Semmankuppam railway crossing between Cuddalore and Alappakkam. M. SAMRAJ

In Cuddalore, a tragedy on the tracks

On the morning of July 8, a train rammed into a van at a non-interlocked manned level crossing in Cuddalore district. While eyewitnesses blame the gatekeeper for alleged criminal negligence, Southern Railway says that the fault lies with the driver, according to its preliminary enquiries. **S. Prasad** reports on the tragedy, which points to the dangers of the continued use of non-interlocked manned level crossings.

Charumathy, 16 and Chezhiyan, 15, usually sat together in the school van. On the morning of July 8, as was routine, the siblings climbed into the van together, clutching their bags and water bottles. Their 55-year-old father, Dravidamani, stood in front of their house in Chinnakattusagai village and waved at them, says their aunt, S. Rani, 42. The bright yellow vehicle belonged to the private school where the two of them had studied since lower kindergarten — Krishnaswamy Vidyanikethan, located at S. Kumarapuram, in Cuddalore district of Tamil Nadu.

A few minutes later, at 7:45 a.m., as the van ferrying the siblings and two other children — V. Nimalsh, 12, and V. Viswesh, 16 — tried to edge past a gated level crossing at Semmankuppam village, a passenger train barreled into it. Charumathy and Nimalsh died by the time he was wheeled into the emergency and trauma care ward of the Jawaharlal Institute of Postgraduate Medical Education and Research in Puducherry, 44 kilometres from the site. V. Viswesh and the van driver, S. Sankar, 47, were rushed to the Cuddalore General Hospital. Doctors say their condition is stable.

The collision

Among the first few people to rush to the scene to rescue the children and van driver was P. Annadurai, 55, a resident of Semmankuppam. He says he heard wails and ran out of his house. "I looked out across my compound wall and saw the mangled remains of the van on the side of the track. The gate was open and I rushed out. When I tried to rescue the children, I came in contact with an overhead power cable and suffered some burn injuries," he says.

Rangan, 50, an employee of a private company in Cuddalore SIPCOT, lives near the level crossing gate 170, a non-interlocked manned gate between Cuddalore and Alappakkam. He was getting ready for work when he heard a loud crash. Sensing that something was horribly wrong, he rushed to the level crossing and saw the mangled van.

"The gate was open and the area was engulfed in smoke. I dialled the ambulance service and then went near the van. The van driver was bleeding profusely and I immediately carried him on my shoulders. There was one child inside the van. One child's body had been dismembered. Another child's body was lying near the tracks. Other locals attended to them," he says.

The residents rushed Sankar and Viswesh in an ambulance to the Cuddalore General Hospital. Viswesh, a resident of Thondamanatham, lies on

OFFICIAL
The Railways should expedite the interlocking of gates on a priority basis

a bed in the emergency ward with an intravenous drip inserted into his wrist and a cast on his left arm. "I was travelling with my brother Nimalsh and two other students apart from the van driver," he recalls. "The gate was open. There was no whistled warning from the approaching train. There was no signal either. The train hit our van as we were crossing the tracks. I was thrown out of the van. Everything happened in a flash."

The Villupuram-Mayiladuthurai passenger train hit the vehicle with such force that it dragged the van for about 50 metres before coming to a halt. By then, the van had been reduced to a mangled heap. Eyewitnesses say they saw blood on the tracks and school bags, water bottles, and shoes strewn around the area.

The gatekeeper's job

According to eyewitnesses, the gatekeeper, Panikaj Sharma, had failed to close the gate when the train was passing. R. Sivanvel, a resident of Semmankuppam, a village near Cuddalore SIPCOT, says, "Another express train had crossed the same gate about 20 minutes before this incident. The gate was open then too."

He also says the train did not give any warning and came thundering down the tracks. The Divisional Railway Manager, M.S. Anbalagan, told the media that the train was travelling at 95 kilometres per hour.

Rangan says the van driver, Sankar, had been operating the school van for nearly 15 years and had taken the same route several times. He adds that more than 15 vans and buses belonging to various educational institutions in the vicinity pass through this level crossing daily.

Residents of the area also allege that Sharma

came out of his room only after they rushed to the accident spot. They contend that this was why an angry crowd pounced on him and manhandled him. Sharma has since been suspended and arrested.

Following the usual route

Southern Railway officials say their preliminary inquiries revealed that the gate was closed when the van arrived. They say the van driver insisted that he be allowed to cross the gate so that he could quickly pick up more children and take them to school on time. "Sharma allowed him to go through, which he should not have done," says an official.

A statement issued by the Chief Public Relations Officer, Southern Railway, said that it had sanctioned a fully funded underpass at the level crossing gate where the accident occurred. However, it alleged that the Cuddalore collector has not given permission for it in the past year. The collector, Sibi Adithya Senthil Kumar, did not respond to phone requests for a comment.

Another Railway official says the road leading to the level crossing was curved. He believes that the trees on the side of the road may have obstructed Sankar's view of the train. The trees mostly fall outside the boundary of the Railways. Workers were pressed into service to clear the trees the day after the accident.



Another express train had crossed the same gate about 20 minutes before this incident. The gate was open then too

R. SIVANVEL
Resident of Semmankuppam

Residents say the driver of the school van took the usual route and tried to cross the tracks since the gate was open. The van had been fitted with speed governor and CCTV but it had no attender to ensure the safety of the students.

"If an attender had been present, he could have got down and checked both sides of the level crossing," says an official from the School Education Department. "There has been negligence on the part of the school administration, and the department has served a notice on the school seeking an explanation."

An outdated system

The level crossing at Semmankuppam was a non-interlocked gate. This means that the gate's position, whether open or closed, is not automatically linked to the status of signals and points, requiring manual operation and vigilance. There are at least two gatekeepers posted there and they work in shifts.

A Railway official explains what happens when a train passes a non-interlocked level crossing. "Normally, the station master at a non-interlocked section communicates the details of an approaching train, along with a private number, to the gatekeeper. The gatekeeper then closes the gate and confirms this to the station master. The gatekeeper provides another private number, enabling the station master to allow the train into the block section. The private number is different for each train and is entered into a register maintained for the purpose. A private number that has been used can be used again only after 24 hours," he says. In this incident, the station master was at Cuddalore station.

However, in non-integrated level crossing

gates, there is no mechanism for the station master to confirm the claim of the gatekeeper that the gate has been closed, he says. "In this incident, they may have exchanged the private numbers, but the gatekeeper could have still failed to close the gate," he says.

Across India, as of October 2024, there were 11,053 manned level crossing gates. Though all the level crossings were to be upgraded to interlocked gates in 2019, Southern Railway still operates trains through 276 non-interlocked gates, mostly in the Madurai and Tiruchi divisions. In Cuddalore, nearly 40 trains on average cross the Semmankuppam level crossing daily. "The Railways should expedite the interlocking of gates on a priority basis," says an official.

Another official speaks of the drawbacks of this outdated system. "The non-interlocked system depends on verbal communication. If the gatekeeper says the gate is closed to road traffic, the station master takes that for granted and clears the train to run at sectional speed. The system is manual and runs on trust. On the other hand, at integrated level crossings, the gate is connected to the signalling system. The signal at the gate will turn red if the gate is open. The station master cannot clear a train to pass unless the gate is closed. And the gatekeeper cannot open the gate until the train passes," he says.

There are other issues with the non-interlocking system as well, and these may not necessarily be the fault of the Railway. Officials say sometimes, people in a tearing hurry even assault gatekeepers for their delay in opening the gate. "One such incident was reported in Mundiampakkam level crossing in Villupuram district in 2008-09. A closed gate should not be opened at any cost. The locomotive of a train weighs nearly 100 tonnes. If the train had derailed at Semmankuppam, more casualties could have occurred," an official says. Officials say the records and statements of the station master, gatekeeper, loco pilot, and train manager will throw more light on the sequence of events that led to the tragedy.

Unbearable grief

Leaders of various political parties condemned the deaths. Tamil Nadu Chief Minister M.K. Stalin announced compensation of ₹5 lakh from the Chief Minister's Relief Fund for the families of the deceased children, ₹1 lakh each for those severely injured, and ₹50,000 each for those with minor injuries. Southern Railway also announced ₹5 lakh compensation for the families of each of the deceased, ₹2.5 lakh for the kin of those grievously injured person, and ₹50,000 for other injured persons.

Meanwhile, Dravidamani's family is in shock, having lost both their children. Rani says Dravidamani, a farmer, had battled against all the odds to ensure that his two children were educated at a private English medium school. Charumathy and Chezhiyan shared a close bond. "Even after coming back from school, they would spend their time together. They rarely went out," she says.

She adds that the siblings were similar in many ways: they were studious, intelligent, and ambitious. "Charumathy stood first in class and won many medals in school. She wanted to pursue an MBBS degree. Chezhiyan wanted to write the civil services exam and become an IAS (Indian Administrative Service) officer," she says.

Rani adds the whole village is shocked by the tragedy and collectively pins the blame on the gatekeeper and the Railways.

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With inputs from Vijay Kumar S.
M-10-NEE



The relative of a deceased student grieves outside the Cuddalore District Government Hospital. M. SAMRAJ

An 'honourable' man in the gentleman's game

In what can be described as a better late than never move, Telangana police on Wednesday arrested the incumbent President of Hyderabad Cricket Association (HCA) A Jagannathan Rao and four of his accomplices, doubling up as 'respectable' officers, including treasurer C J Srinivas Rao and CEO Suneel Kante, on a slew of charges, such as forgery, coercion, graft, misappropriation of funds running into crores and blatant abuse of power. Also, the execution of the cleansing operation has been overly delayed as calls for his head have been gathering momentum for years together. What cannot miss the eye of those closely following the embezzlement saga and the dictatorial rule is that the money swindled by Rao and his henchmen goes way above the Rs 2.3 crore that is being projected. If one goes by the manner bills have been inflated for procuring material like ACs, during the conduct of the Hyderabad leg of Indian Premier League (IPL) and other championships, shows that it has shelled down amounts that would put to shame the spendings on a big fat wedding.

Findings by vigilance and enforcement investigators, after the Telangana Crime Investigation Department (CID) filed a case under a multitude of Sections expose the criminal traits of the shady man, who did nothing except use the Association as a money-spinner. A look at the bills that have been raised and settled reveals the extent of Team Rao's criminality. Rs 11.85 lakh (new ACs), Rs 6.85 lakh (electric material), catering (Rs 31.07 lakh) and apparel (Rs 56.84 lakh) ostensibly for meeting the requirements of the domestic season, and buying 1,340 cricket balls for a whopping Rs 1.03 crore.

HCA has been in the news for all the wrong reasons since the time Rao assumed office, under dubious circumstances using forged documents to lend credibility to a club that was technically non-existent. The HCA-controlled RGICS has been the headquarters of Sunrisers Hyderabad (SRH). Not ironically, it was the SRH that came up with damning charges against the HCA, including harassment, intimidation and using pressure tactics. SRH, in fact, threatened to relocate its base from Hyderabad unable to bear the ill-treatment by the HCA 'gang', which also demanded more than the earmarked 3,900 complimentary passes for each match played at RGICS. This case took off after a complaint was lodged by Dharam Gurava Reddy, general secretary of Telangana Cricket Association (TCA) on June 9. Reddy charged that Rao, a 'master manipulator' who was never associated with the HCA or the game, contested its elections using fake documents and a forged cricket club membership to qualify for the 2023 elections. His candidature gained 'credibility' when it was backed by the equally notorious Gowdipura Cricket Club president G Kavita and her husband Rajender Yadav, its general secretary, who have since been arrested.

A sad fallout has been that Hyderabad, which was once revered for churning out exceptionally gifted cricketers, is in doldrums, the domestic season seems like a ritual that has to be complied with and there has been no promotion at the district level. The dubious machinations of Rao have been so notoriously high that everyone associated with the sport in the state is hoping that this episode will mark Rao's Waterloo. Mark Antony's 'honourable man' suits men of Rao's ilk, who, as an official pointed out, out-surpass Brutus in terms of treachery and hanging on to power by hook or crook.

LETTERS

Kudos to Politickle cartoon on corruption

MANJULS Politickle cartoon (THI July 11) 'speaks' volumes about the level of corruption in today's India. Indeed, nothing can shake the bridge of corruption. It is everyday news that we come across about corrupt top authorities across fields, being caught red-handed. This practice is not new in our democratic country. It is a sad commentary that leaders come to power and go, but the flow of corruption is not bridged by anybody. Changing of legal codes are untenable if they are not implemented in a short period. We have often noticed that criminals and those guilty of indulging in corrupt practices get bail, a reality that further emboldens such criminal minds. It is an incurable epidemic.

N Ramalakshmi, Secunderabad

Govt must act tough against betting Apps

CEBRITIES from tinsel town, including actors and directors, enjoy a tremendous mass following, across the globe. Heroes and directors come up with films that are drawn on real-life incidents, including crimes and criminals, social dogmas and corruption. Many directors and actors get global acclaim for such realistic portrayals. However, it is unfortunate that such personalities are luring lakhs of innocent people towards online betting activity by doubling as brand ambassadors. Facebook and YouTube are attracting the youth, including kids, by the liberal manner with which they show sex, violence and criminal elements. The government alone can put an end to this sordid practice by coming up with a policy on how to save all potential victims. Punishing the culprits can be an effective deterrent.

Guadipati Shanti Priya, Secunderabad-11

Bengaluru brouhaha-Kharge ineptness to the fore

APROPOS your editorial 'Bengaluru brouhaha resonates in distant Delhi'. The power tussle for Chief Ministership in the Congress ruled Karnataka, between the incumbent Siddaramaiah and D K Shiv Kumar is unmissable as MLAs loyal to the latter are demanding a rotational policy for the CM's post. Siddaramaiah has unequivocally said that the gaddi is occupied - and there is no vacancy for the post as of now, and he would complete his full term. Ironically, he was saying this before the media, and in the presence of Shivakumar, who was smiling as if he was acknowledging the remarks. The AICC boss Mallikarjun Kharge proved helpless in resolving the issue and left it to the party high command. There is a strange situation in Karnataka as people are questioning their chances in choosing the Congress government that has miserably failed to deliver.

K R Parvathy, Mysuru

Bengaluru froac echoes in Delhi

THERE is no iota of doubt that the Congress central leadership fumbled as regards the power play between Karnataka Chief Minister Siddaramaiah and his deputy D K Shiv Kumar. The way it is handling the tricky issue has left deep cracks in the edifice of the party's state leadership. Despite damage control exercises, the factional divide appears to have widened further. Even though Siddaramaiah's grip on power may have been affirmed by Congress High Command, which has since pacified Shiv Kumar for the present, it cannot be construed as surrender because Shiv Kumar is not a leader to be lied for long. Though the storm has receded for the time being, the Congress party has not learnt its lessons. By and large, the actions of the Congress think tank throughly expose its inadequacies. It is trying to save its face for a momentary relief even as it stares at long-term disaster.

K R Srinivasan, Secunderabad-3

Government alone can save the people

THERE are many approved toddy shops and liquor outlets across the country. It is commonplace to find advertisements and statutory warnings saying 'Alcohol and cigarettes are harmful for health'. These appear on screens, in newspapers and hoardings. Given the open sale of liquor and toddy, many people, including ladies and youth, are getting hooked on to such vices and falling sick. It is up to the government to come up with ways and means to put a stop to such outlets operating in the open.

G Murali Mohan Rao, Secunderabad-11

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BENGALURU ONLINE

High Court stays defamation case against CM

BENGALURU: The High Court has stayed the trial proceedings against Chief Minister Siddaramaiah in a high-profile defamation case filed by the BJP, which alleges that the Congress leader defamed the party through front-page newspaper advertisements accusing the previous BJP-led state government of large-scale corruption.

A single-judge bench headed by Justice S R Krishna Kumar passed the interim order while hearing a petition filed by Siddaramaiah seeking to quash the private complaint lodged by BJP state secretary and Legislative Council member B.S. Keshav Prasad.

During the hearing, Advocate General Shashikiran Shetty, appearing for the Chief Minister, argued that the trial court had already stayed proceedings against the other accused in the same case and hence the same relief should be extended to the Chief Minister as well. After considering the submissions, the bench ordered a stay on the trial pending further hearings. Advocate Surya Mulikaraj also appeared for the petitioner.

The defamation case dates back to the run-up to the May 2023 Assembly elections when the Congress made corruption allegations a central theme of its campaign.

On May 5, 2023, the Congress published advertisements on the front pages of major Kannada and English newspapers, branding the BJP regime as a "40% commission government".

Read more at <https://epaper.thehansindia.com>

Opposition or obstruction? A nation held hostage by political rowdiness



V RAMU SARMA

IN a democracy, the opposition plays a critical role. It comprises political parties or groups not in power but with a significant presence in legislatures like Parliament or State Assemblies. Their primary function is to question, critique, and scrutinise the government's actions, ensuring no abuse of power. They are also expected to suggest alternate policies, champion transparency, and give voice to diverse concerns of the public.

A responsible opposition acts as a watchdog, not a saboteur. It is not an enemy of the ruling government but a guardian of democratic values. A strong opposition keeps authoritarianism at bay and preserves the spirit of the Constitution. But what we witness today, across parties and states, is a disturbing deviation from this principle.

Instead of offering constructive criticism or alternative solutions, many opposition parties have chosen disruption, division, and destruction as their political weapons. Arrogance, street-style rowdiness, inflammatory speeches, walkouts, and the deliberate blocking of legislative processes have become commonplace. Sadly, this degeneration is pan-Indian—no North-South

divide here. Take Andhra Pradesh, for example. Former Chief Minister Y S Jaganmohan Reddy, who had dismantled institutions, and demands status of leader of opposition though his party doesn't meet the criteria, boycotts the Assembly and incites supporters with violent rhetoric like "Rapa Rapa"—a grotesque reference to slitting throats. His rallies are routinely marred by mismanagement; recently, during a visit to Sattenapalli, civilians lost their lives due to crowd chaos. One of his own supporters was crushed by the vehicle he was travelling, yet there was no remorse.

Worse, Jagan triggered a law-and-order scare by breaching security protocol, trying to step out of his car to confront a situation based on unverified reports on Wednesday in Chittoor district. His party indulges in street theatre, disrupting mangoes procured from neighbouring towns on roads in protest minutes before his visit. There are also whispers that YSRCP leaders are discouraging investors from entering Andhra Pradesh by sending emails. Each Jagan appearance now signals potential chaos—a serious concern for both the government and police.

In Maharashtra, political rowdiness has taken another form. Eknath Shinde's Shiv Sena leader Sanjay Gaikwad assaulted a canteen owner over an alleged state food that was served. This is the same leader who had earlier of-



In a thriving democracy, the opposition is expected to uphold constitutional values, offer constructive criticism, and act as a watchdog against authoritarianism. But today's political reality tells a grimmer story—one of disruption, deception, and dangerous theatrics. From violent rhetoric and legislative walkouts to stoking cultural divisions and shielding religious extremists, opposition parties across India are abandoning democratic duties in favour of vote-bank politics. This Op-ed dissects this descent into political rowdiness, exposing how leaders like Jagan Reddy, Rahul Gandhi and L.N.D.A. bloc allies are subverting democracy—not strengthening it. This isn't opposition—it's obstruction at the cost of the nation.

fired a bounty to anyone who would cut off Rahul Gandhi's tongue. Such rogue elements make a mockery of law and democracy.

The response from state governments has been tepid. Whether in Andhra Pradesh or Maharashtra, it's time for democratic action against those who refuse to adhere to the democratic ethos. If such elements are allowed to flourish, the brand image of the state—and indeed the nation—will suffer.

Elsewhere, opposition parties are actively stoking linguistic and cultural fault lines. In Karnataka, Tamil Nadu,

and Maharashtra, they cry foul over an alleged 'Hindi imposition', manufacturing a controversy where none exists. Strangely, their outrage never extends to celebrities or industrialists who don't speak the local language—wealth, it seems, buys silence and exemption.

Neither Rahul Gandhi nor his L.N.D.A. bloc allies will utter a word about how a mere ring-seller with a pushcart morphed into 'Changur Baba', amassed over ₹100 crore by getting foreign funds through coerced conversions in Uttar Pradesh, and owned a palatial bungalow with

foreign-breed dogs, Arabian horses, and links to criminal networks. They won't speak against those who routinely attack Sanatan Dharma. Why? Because they believe Hindus, being largely silent and tolerant, are politically dispensable. For them, it's not about principles; it's about vote banks.

In Bihar, which heads to polls later this year, the opposition continues to beat the tried drum of 'Constitution in danger'. The L.N.D.A. bloc—fragmented and opportunistic as it is—offers no fresh vision. The same leaders who celebrate electoral wins cry foul when they lose, questioning EVMs, VVPATs, and the Election Commission's integrity.

Rahul Gandhi remains stuck in denial. He speaks of stolen votes and rigged systems, yet refuses a formal EC invitation to discuss electoral processes. His hit-and-run tactics miss the mark every time. People want jobs, growth, and governance—not dynastic theatrics or divisive slogans. Even his repeated chant of 'caste census' lacks seriousness. In Karnataka, it took enumerators mere seconds per household; in Telangana, stickers were pasted in many places with no actual data collection.

When Congress wins—be it Karnataka, Himachal, or Telangana—there's silence on electoral malpractices and selective revision of electoral rolls. But when they lose—like in Haryana or Maharashtra—EVMs suddenly become the suspect, and the EC is accused of being BJP's

puppet. Rahul accuses the Commission of withholding critical data and voter footage. One must ask: what were Congress booth agents doing during these elections? They colluded with the BJP! Or is it just another excuse from a party running amok?

Even the CBI brigade of the opposition, like Tejashwi Yadav, is mimicking the old dynamic play. In Bihar, he calls for 'Krant' against BJP and mocks CM Nitish Kumar's initiatives. This from a leader of a party that has never embraced democracy within its own ranks. For him, democracy likely means the power shuttle from father to mother to son—not the people.

Leaders like CP's D Raja, CPI(M)'s Dipankar Bhattacharya, Congress President Mallikarjun Kharge, Mamata Banerjee, and Noida-aspirant Arvind Kejriwal must introspect. What kind of democracy are they promoting when they stand against national security measures or indulge in disruptive politics?

The time has come to differentiate between a democratic opposition and a destructive force masquerading as one. The Indian public is not fooled anymore. They seek accountability, not anarchy. They want development, not drama. And they deserve an opposition that rises to the occasion—not one that drags democracy into the gutter for political gain.

(The author is former Chief Editor of The Hans India)

Parental controls over kids' tech devices is no child's play

SARA M GRIMES AND RILEY MCNAIR

PARENTING in the digital age can be stressful and demanding, a lot for parents. The Family Online Safety Institute (FOSI) recently released its annual Online Safety Survey, which discovered that almost 50 per cent of parents surveyed aren't using parental controls to manage their children's devices.

These are tools that would ostensibly help parents filter out inappropriate content or unwanted interactions on their children's devices. The FOSI authors conclude that the reason parents aren't using the tools is because they feel 'overwhelmed' and recommend parents educate themselves a lot from parents' first step toward broader use.

While overwhelm is a real thing, we suggest a bigger problem with parental controls is how they are designed. This includes how little attention is given to supporting open communication between parents and children.

Over a year for the past three years, we've asked the same 33 children (initially aged six to 12) what they think about content ratings, online safety, game monetization and privacy. Our team's combined expertise in communication, education, policy and game studies analysed their answers.

We also asked their parents how they mediated their kids' gaming. Nearly half of them don't use parental controls either. They say parents would use parental controls as promised, offer little context about how settings affect gameplay and force binary choices that don't align with household rules or with children's maturity levels.

The parents we asked said that they aren't avoiding parental controls because they feel overwhelmed by them. It's that the tools are poorly designed.

Controls can create more problems: At the same time, many of the parents described themselves as highly engaged in their child's gameplay, talking with their children regularly or encouraging play in shared, supervised spaces. Several said they choose to trust their child rather than set top-down limits. Our findings align with previous research on digital parenting.



Open communication between parents and children on safety topics fosters trust, which increases the likelihood that kids will turn to their parents for help when something dangerous happens. It enables children to build resiliency, which in turn reduces the risk they'll be harmed by negative online encounters.

Awareness about risks: The six children whom we interviewed were not aware that their parents were using controls, and at least two children revealed they didn't even know why a parent would use parental controls in the first place.

In this context, parents' efforts to protect their children had the unintended side effect of obscuring vital knowledge, leaving the children unaware of some of the key risks associated with playing online. Parental controls can remove opportunities to teach

kids about safety if they aren't part of the conversation. We believe that the behind-the-scenes protections enabled by (some) parental controls can be detrimental to parent-child communication about online safety. What are the risks? How can children avoid the riskiest behaviour? What should they do when or if they've encountered danger? Meanwhile, parents aren't always familiar with the features and activities they are asked to restrict or allow. Very few parental controls contain information about how gameplay will be impacted by their settings. Many times parents limit

someone familiar with the game would understand, while others are hard to navigate. All of this can lead to misinterpretations and parent-child conflicts, making the tools even harder to use.

Power of communication: Open communication between parents and children on safety topics fosters trust, which increases the likelihood that kids will turn to their parents for help when something dangerous happens. It enables children to build resiliency, which in turn reduces the risk they'll be harmed by negative online encounters.

Research also suggests that parent-child communication may be more effective and help avoid harm than embedding restrictions enabled by parental controls. The importance of open communication is also emphasised in the FOSI report.

In households where conversations about online safety happened regularly (six times or more a year), parents and children were both more likely to view parental controls as a useful and valuable tool for online safety. This, the authors conclude, "supports the view of online safety as a collaborative effort as opposed to a priority imposed by parents on their children."

On this point, we couldn't agree more. Families would benefit from making parental

controls and safety settings a family affair. Kids and parents have a lot to learn from each other about the digital world, and reviewing these systems together can provide a much-needed opening for crucial conversations about risk, safety and what kids find meaningful about digital play.

Rethinking safety tools:

Let's not pretend parental controls are a panacea for child safety. Many parental controls contain serious design flaws and limitations. Very few comprehensively address the needs and concerns of either children or their parents. Now that lawmakers are starting to make parental controls a mandatory part of new child safety legislation, we urgently need to start taking a closer and more critical look at what they can and can't do. Parental controls can be a useful tool when they are designed well, applied with transparency, and provide families with ample options so they can be tailored to not only fit with but foster household rules and open communication. There's a lot of work to be done before this is the standard. And growing impetus for games and other tech companies to make it happen.

(Sara M Grimes is from McGill University and Riley McNair is with the University of Toronto)

Opinion

SATURDAY, JULY 12, 2025

Levers of change

The new HUL boss should tread cautiously on Unilever's strategy to lower focus on local and regional brands

THE SWIFT LEADERSHIP change at Hindustan Unilever (HUL), announced on Thursday, came as a surprise to many, which is understandable as Rohit Jawa is only the second CEO in HUL's long history to have got just a two-year stint at the helm. But if you dig a little deeper, the change was expected for at least two reasons. First, the average CEO tenure in companies around the globe is anyway becoming shorter, courtesy the mindboggling changes and uncertainties in the external environment. Second, Unilever itself saw the abrupt exit of Hein Schumacher as the global CEO just 20 months into his tenure in February. He was replaced by Fernando Fernandez, who the board thought has the ability to capitalise on the company's growth plan "with urgency". It all came down to that one word, much beloved by Wall Street: urgency.

So it can be a safe assumption that Priya Nair, a tried and tested hand at both HUL as well as Unilever, has been given the job to lend urgency to the business rejuvenation plan that Fernandez, another Unilever veteran, has in mind. The overarching global theme of this plan is to move faster with a focus on demand creation and execution. It is clear from Fernandez's public interventions so far that he seeks an acceleration in the rollout of global brands in India and a lower focus on local and regional brands. He expects quick commerce to become a much bigger force with nearly a 15% share in HUL's sales in three-four years, from the 2% plus level now. That's a massive increase and points to the disruption that lies ahead in the distribution channel. The idea is to clear the path for higher volume growth, something that the company's shareholders have been missing for some time now. The new India boss, thus, has her hands full.

The lower focus on regional/local brands can, however, prove to be a big gamble in India. HUL has prided itself on its "Winning in many Indias" strategy in a country where the market dynamics changes every 100 km. India's largest consumer goods firm has also positioned itself as one which straddles the pyramid in a country with wide economic disparities. In that context, the global CEO's strategy of "attacking" the positioning of what he calls a federation of local and regional brands can be jarring. HUL derives nearly 30% of its turnover from region-specific or country-specific brands, so this focus on power brands should not constrain country- or region-specific brands in India.

Going by the enthusiastic response to the HUL stock on Friday, the markets are clearly betting on Nair's success. There is no doubt that the first female CEO of HUL has a deep understanding of the Indian market, which is Unilever's second largest contributing 12% to the topline, and has a strong track record on execution. She has spent nearly three decades with Unilever, including key leadership roles at HUL, where she led the home care and beauty businesses. But she comes in at a time when HUL, like many other peers in fast-moving consumer goods, has been grappling with sluggish demand, margin pressures, and increasing competition from digital-first and regional brands. In fact, HUL's volume growth has been under 5% in the past six years and its traditional distribution strengths are under pressure. It also remains to be seen how the company modernises its go-to-market strategy to remain competitive under her stewardship.

Jane Street should put its secret India sauce to test

JANE STREET GROUP has told its employees that the Indian regulator, which has accused it of market manipulation, is "fundamentally mistaken" about its trades. A math nerd in London thinks there may be a way to find out.

The Securities and Exchange Board of India sent ripples through trading rooms around the world last Friday when it temporarily banned Jane Street from the local market and froze \$48.4 billion in what it alleges to be unlawful gains.

According to the New York giant firm's email to employees, the whole premise of the 105-page interim order is wrong. It is preparing a formal response. Sebi, meanwhile, is bracing itself for a grueling legal battle. The regulator says the high-frequency trading giant has made \$4.3 billion from India in a little over two years, and so far its officers have only investigated trades in one index. The stakes are high, especially if other countries launch their own probes.

That's a cue for bruised competitors to wade in. Around two years ago, rival GTX Markets Ltd.'s share ratio—a measure of profitability per unit of risk—went from 1.0 to zero overnight in India index options. A ratio of zero means there is no compensation for the risk. The trade "never recovered and was completely shut down earlier in 2023, the first time in our 17 years history when we abandoned a market where we used to make money previously", Alexander Gerko, the billionaire geek behind the UK-based algorithmic trading firm, wrote on LinkedIn.

Gerko suspects that his New York competitor got the better of GTX. But did Jane Street, one of the largest market makers, win fair and square? In a subsequent post, Gerko proposed a thought experiment to self-described puzzle solvers at Jane Street. Here's how they could prove their smarts: "Imagine reducing all sizes in your margin by a factor of 100. If it works better than before (per unit of risk) in terms of margins then it looks legit. If it stops working altogether after scaling down then question your life choices."

This is a testable hypothesis. The regulator's contention is that the Jane Street bets were intentionally super-sized. When they hit relatively illiquid equity and futures markets on a day options on the Bank Nifty—a popular gauge of 12 financial stocks—were expiring, they ended up moving the index so that the trader profited spectacularly from its much larger options positions, while consistently losing money in stocks.

But what if Sebi is wrong? What if Jane Street has a legitimate and "immensely valuable" proprietary trading strategy for India, as it claimed last year when it sued two of its former traders who had left to work for Millennium Management? (The suit was later settled.) In that case, the firm should be able to demonstrate even higher profitability for smaller position sizes.

This is a perfect setting for a contest. Sebi should invite the two rivals for a demonstration. The firm under the scanner would simply have to show that it can still make money with bets 1/100th the size of what the regulator has characterised as "an intentional, well-planned and sinister scheme" of market manipulation. GTX, on the other hand, would be required to do two things—reprise its own now abandoned trades, and implement what Sebi thinks Jane Street's strategy was. For the latter, GTX would have temporary indemnity, as long as any supernatural profits are credited to India's investor protection fund.

Jane Street has disputed the Sebi interim order and said it is "committed to operating in compliance with all regulations" in markets worldwide. A demonstration of its skills may help shore up perceptions of its global business. But should Gerko's hypothesis be proved right, Jane Street should be prepared to lose quiet talent to its rival.

Most importantly, though, such an experiment would either collapse Sebi's argument, or put it on a stronger footing when legal proceedings begin. It will be helpful for the judges to approach this complicated case with familiar courtroom tools like remanufacture and expert testimony. Otherwise the lordships might get lost in arcane option-market jargon.

Let both Jane Street and GTX show what they would cook up for the world's biggest equity derivatives market by volume, without revealing their secret sauce. The technical ingredients are far less important than the philosophical question that has come up on social media: What is the true role of large market makers in society, and are high-frequency traders fulfilling it?



ANDY MUKHERJEE
Bloomberg

REAL POLITICS

MOBILISING MANY SMALL GROUPS TO ADD TO VOTE BASE WILL BE KEY FOR POLITICAL PARTIES IN UPCOMING POLLS

Small is powerful in Bihar

BADRI NARAYAN

Director, GB Pant Social Science Institute, Allahabad



PHANISHWAR NATH RENU, the eminent novelist who used to write on the social-political churning in Bihar, made two important observations on the society and development politics in Bihar in his most famous work, *Malta Anchal* (The Soiled Linen). Firstly, he observed that "in one society, multiple societies coexist". He mapped how caste-based societies work and function under the umbrella of one society in Bihar. He documented how people belonging to the same caste described themselves as "baradari" or "samaj". Secondly, he underlined how this caste "bhar" (feeling) of the society in Bihar and other parts of India hamper development.

These observations that he made in the first decades of independent India continue to be relevant. If one converses with people in Bihar to understand electoral politics there, it isn't unusual to hear them say that "this candidate belongs to my samaj". The word here doesn't denote a macro-society ("sari samaj") that is usually the case but in the micro sense—that is a society composed of the same caste.

In the upcoming Assembly elections, one can find the prevalence of caste in development and Bihar identity-based discourses, like threads in the structure of political mobilisation. The relevance of Renu's second observation is also evident in the election-based democracy that is committed to making a modern society while confronting caste in our everyday life. It is true that in some cases, caste may help marginal communities to become upwardly mobile. However, in most cases, it weakens the democratic fervour of society.

In this year's election, development of Bihar has emerged as a core part of the electoral discourse. But like earlier, caste still works as a significant, cementing force for various mobilisations that con-

testing political parties are vying for. Bihar is known for the dominant presence of other backward castes (OBCs) in politics. Yadav, Kushwahas, and Kurmis acquired a capacity for political aspiration ahead of others in the OBC bracket as well as most backward castes (MBCs). These three communities formed an organisation named Triveni Sangh in the first decades of the 20th century. They produced leaders and started asserting their share in politics and power effectively in pre-independence India. Due to this historical edge, they emerged as the most powerful communities in Bihar politics in recent decades. According to the recent caste-based survey by the state government, the Yadavs with all their sub-castes together constituted 14.26% of Bihar's population, with Kushwahas forming 4.21% and Kurmis 2.87%.

If one analyses the political history of Bihar, among OBCs Yadavs appear as the largest community. It evolved its own caste-based politics more powerfully than other OBCs and extremely backward castes in Bihar. The Rashtriya Janata Dal (RJD) holds the largest Yadav vote base, although other political parties have also given representation to Yadav leaders.

Due to the political visibility and aggressive social assertion of Yadavs, at times other castes among OBCs such as

Kurmi, Kushwaha, Dhanuk, Kumhar, Nai, and Chaurasia have formed a social alliance in support of their politics and countering the RJD. The Janata Dal (United) (JD(U)) including its leader, Nitish Kumar, is a product of a non-Yadav rainbow alliance of OBCs and other castes. In this arithmetic of politics, MBCs play a crucial role and most of the time, a section of them favours Kumar and also supports the Bhupendra Kumar Party (BKP). This sense of marginalisation due to the dominance of one caste forms a political psychology of the public that many a times harms the RJD. However, the RJD also tries to give representation to leaders from significant OBCs and MBCs. So, in Bihar politics, binaries have emerged between the dominant and non-dominant, the politically most visible and those aspiring for visibility, the marginalised and the most marginalised, and between the newly rich and dominant OBCs and the upwardly mobile OBCs and MBCs.

In contrast with many states, Bihar's politics now does not accommodate a forward-backward binary that was witnessed in the pre-90s era. The contest is more among various OBC communities for their own political share and visibility. It may appear a clash of silent aspirations of various backward communities

for political visibility. In this grammar of political assertion, a sense of dominant versus non-dominant may play a crucial role and favour the National Democratic Alliance (NDA) in the Bihar polls. The RJD may appear more dominant in terms of electoral visibility, but in the process the party could become a catalyst in uniting the non-dominant sections in favour of the JD(U) and the BKP. That can be a caste-mobilisation. In other words, the RJD's greater visibility and aggressive campaigning may help it to fight the election effectively. But it may also result in a cohesive counter-mobilisation against it.

Also, the beneficiaries of a "double-engine sarkar" (Prime Minister Narendra Modi-led central and Kumar-led state governments) may dilute the polarisation of castes and form overlapping social groupings that benefit the NDA. Modi's development discourse could also be an influential factor. Meanwhile, the entry of Prashant Kishor and his Jan Suraj Party, and his strategy to craft a contest based on Bihar's development and identity may influence the election discourse, but it may not be effective enough at the grassroots to translate into votes.

This Bihar election has multiple political epicentres in which communities that are smaller in numbers could play an outsized role in the eventual outcome. The upper castes, who are numerically weak in Bihar, may emerge as a balancing factor in determining results in various constituencies. It is fair to say that "small is powerful" in this election. Last but not the least, due to the several strong epicentres, this election will see various fragmentations of votes. So, in my view, rather than consolidation it is the fragmentation of votes that holds the key to success. The party that goes on to mobilise many small social groups and add to its vote base will have the best opportunity to win.

Time is ripe for private damage actions

PAYAL MALIK, LUKE STRETFIELD, DEMICA KAUR NETTLEFORD & RAM TAMARAPPOO

Respectively senior advisor, Econ One and ICRIER Pross Centre; partner, Hausfeld & Co LLP; associate, Hausfeld & Co LLP; and consultant, Econ One

IT'S BEEN MORE than three decades since India replaced a command-and-control mode of governance relying on state ownership of the means of production with a new mode of governance where private sector participation in economic activity is governed by the rule of law and independent regulation.

While independent regulatory bodies are entrusted with the statutory mandate of sectoral governance in areas perceived to be at greater risk of market failures, such as telecoms, oil and gas, ports, and airports, an economy-wide market regulator, the Competition Commission of India (CCI), has supplemented these regulatory institutions to make markets function better and provide the necessary "entrepreneurial freedom" to fuel economic growth.

On the back of these economic and institutional reforms, thus far, India is poised to become the third largest economy in the world. With balanced regulatory oversight and stakeholder engagement, a strong regulatory foundation can unleash the potential of industry and preserve the appropriate incentives for investment and innovation.

The enforcement of competition law—to combat anti-competitive agreements, anti-competitive mergers, and abuse of market power—provides the ground rules of a market economy. Anti-competitive conduct affects the process of competition—how competition unfolds in the market—and as a result causes harm to competitors and consumers.

While regulatory action can deter anti-

competitive conduct by ordering violators to cease and desist (from such conduct) and/or imposing financial penalties, is such action alone sufficient to curb anti-competitive behaviour? We argue that the time is now ripe to broaden the instrumentality of competition law beyond just enforcement by the regulator.

Regulatory action, however, does not ensure that those harmed by anti-competitive behaviour are compensated for the losses suffered. Fines imposed by the regulator, which are often formulaic, may have no relation to the actual harm caused and may not be punitive enough to deter anti-competitive conduct. Moreover, it is worth noting that the fines imposed, although substantial, may be relatively small compared to the relevant business profit. Therefore, the deterrence effect may not be as impactful as one would hope.

Realising this, several jurisdictions, including the US, the UK, European Union (EU), and China allow private damage actions where consumers and competitors harmed by anti-competitive conduct litigate for damages in court. In the US, UK, EU, and China, private damage actions can be initiated even if there is no regulatory proceeding. Further, in the US, the law allows for treble damages to be awarded in private damage actions, thus

acting as a severe deterrent on firms/corporation/business entities.

Private damage actions have been filed and litigated in relation to cartels, and monopolisation, invariably all the traditional sectors of the economy—including financial services, energy, technology and transport—across the US, UK, EU, and China. For example, in transport, in 2016 the European Commission fined five truck manufacturers €2.9 billion for cartel activities.

This decision led to numerous private damage claims in the UK and EU. In the Netherlands, one of the five major manufacturers involved in the Dutch trucks cartel, DAF, recently settled with 1,000 claimants in the Dutch Trucks litigation. Similarly, the US Air Cargo Shipping Services Litigation (a follow-on damages action related to collusion on shipping charges) settled for \$1.2 billion and in the healthcare sector the *Blue Cross/Blue Shield* lawsuit resulted in a settlement exceeding \$1.6 billion.

In financial services, the UK Competition Appeal Tribunal recently approved a €200-million settlement in *Merricks v Mastercard*, a collective action against Mastercard in relation to interchange fees.

In the tech sector, the UK Competition Appeal Tribunal recently certified a €13.6-billion claim against Google over its alleged anti-competitive behaviour in

They can complement CCI's work, both to promote fair markets and to benefit competition and consumers in India's rapidly developing economy

"ad tech" which will now proceed to trial, and the court recently granted a £1.5-plus billion claim against Apple for abuse of its dominant position on behalf of 19 million UK consumers. Both these cases are also the subject of similar EU proceedings in the Netherlands.

In 2023, the Beijing People's Court in China ordered Alibaba to pay JD.com RMB 1 billion for abuse of dominant position in relation to its online marketplace (*JD.com v Alibaba Group*). This award is the largest damages award in the history of private enforcement litigation in China.

Section 53N of India's Competition Act provides the legal framework for compensation claims to be brought by market participants who are affected by anti-competitive practices. While a few claims have been filed with the National Company Law Appellate Tribunal (NCLAT), progress has been slow. Well-established regimes in the US, EU, and UK could potentially serve as models for the development of private enforcement of competition law in India in the coming years, to complement the public enforcement initiatives of the CCI.

New India has had 15 years of enforcement by the competition authority and several rulings by the NCLAT on appeals, the time is ripe to consider how private damage actions can complement the CCI's work, both to promote fair markets and to benefit competition and consumers in India's rapidly developing economy.

Views are personal

LETTERS TO THE EDITOR

Greater focus on APIs needed

India is paying for its callous approach towards the mounting import of active pharmaceutical ingredients (API) from China. India has the ability to be a tough competitor, India has the scientific wherewithal and enough technocrats to ensure local manufacturing of APIs for own consumption and even for exports. But so far, we have only allowed

Indian companies to look for profits, and trading in APIs from China was found to be beneficial in this regard. Even back in the 1980s, the United Nations Industrial Development Organization had appreciated India as not only self-reliant but as able to cater to the global market. We need greater focus on this area. Performance-linked incentives do not work in several areas, and need a thorough review. —AG Rajimohan, Anantapur

EC should heed SC

The Supreme Court has given an opening to the Election Commission (EC) to go about the revision of the electoral roll the correct way in asking it to consider the Aadhaar, elector photo identity card, and ration card as proof for voter registration. The EC should not miss the opportunity for course correction and make the "special intensive revision" people-friendly. It cannot hold that Aadhaar,

which is considered basic for getting other documents, is unacceptable while "dependent documents" obtained on its basis are acceptable. True, it is tasked with revising the electoral roll, but it should ensure that the voter registration does not become or morph into a "citizenship screening" exercise or result in the disenfranchisement of eligible voters. —G David Milton, Maruthanode

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[OUR TAKE]

ECI's Bihar
conundrum

The Supreme Court's suggestion to include Aadhaar, EPIC, and ration card as valid proofs of identity for electoral roll offers a way out

The right to vote and the freedom to exercise it are essential features of a successful electoral democracy. These are also prerequisites to ensure that the outcome of elections reflects the popular mandate. It is the responsibility of the Election Commission of India (ECI) to ensure the sanctity of the electoral process, which also means that no Indian citizen who is eligible to vote is excluded from the electoral roll, or a non-citizen subverts the process by acquiring voting rights. It is for this purpose that ECI periodically updates the electoral roll ahead of elections. However, in Bihar, where assembly elections are due soon, its Special Intensive Revision process to make a fool-proof electoral roll has run into rough weather over the conditions set for inclusion or retention of a citizen in the master document. The Opposition and some civil society groups have moved the Supreme Court, arguing that ECI's initiative will result in disenfranchisement of a large number of voters. The fears are real, as an exhaustive report in HT has revealed, and they call for immediate redress.

On Thursday, when the two-judge Bench began hearing a clutch of petitions, at least three important observations by the court stood out. One, the judges did not stall ECI's electoral revision process, though it said ECI's actions are subject to judicial review. This is understandable because the Representation of the People Act authorises ECI, a constitutional body, to conduct elections. The Court is cautious about institutional redlines, though the legal questions regarding the extent of the state ECI's actions will be settled later. Two, the Court has asked ECI to consider adding Aadhaar, Electoral Photo Identity Card (EPIC), and ration card to its list of acceptable documents. The Court has also said ECI must explain the reasons if it rejects the suggestions. ECI's decision to exclude Aadhaar, for instance, has been baffling since the government has previously said that the unique identification number and the use of biometrics make it a fool-proof document of identity. ECI will need to explain why it disagrees with the government's stance. Three, the Court pointed out that ECI has no mandate to verify citizenship — that is a task left to the Union home ministry. Aadhaar, PAN and ration card are not admissible as evidence of citizenship but can surely be treated as documents to establish identity.

Numerous reports substantiated with data have revealed that persistence with ECI's current list of documents could lead to massive exclusion of eligible voters, especially women, underprivileged, and migrant workers, from the electoral roll. This has much to do with State capacities, which reflect in low levels of birth registration (only 26.2% births were registered in Bihar in 2007, the last year that would make people eligible to vote in 2025), the absence of educational documents (only 23% of adults had completed school, as per the 2011 Census), and employment identity cards and pension documents issued by the government (just about 4.8% of Bihar's population were in government service, according to 2023 caste survey). In comparison, Bihar has generated 114 million Aadhaar cards for its projected 130 million population (as of July 2025); 83 million Biharis also have their names included on ration cards.

In this backdrop, and considering the short time window available, ECI should heed the SC's suggestion, expand its list of identification documents, and ensure that no citizen is deprived of her constitutional right to vote.

ELV to EV: What
clean mobility
policy must doPhasing out end-of-life vehicles
reduces the stock of heavy
polluters but does not
necessarily accelerate the shift
to zero-emission mobility

In a significant development for air quality governance, the Commission for Air Quality Management (CAQM) has amended its earlier directive to now mandate that fuel stations in Delhi and five high-vehicle-density National Capital Region (NCR) districts — Gurugram, Faridabad, Ghaziabad, Gautam Budh Nagar, and Sonapat — must deny fuel to petrol vehicles older than 15 years and diesel vehicles older than 10 years starting November 1, 2025. This enforcement mandate will extend to the rest of the NCR from April 1, 2026.

The move has sparked public debate, with some contending that a valid Pollution Under Control (PUC) certificate should be adequate. Yet, CAQM's action reflects an attempt to take a more decisive, data-driven approach to tackling Delhi's persistent air pollution challenges.

What critics are overlooking in this debate is that CAQM's directive is not a new rule, but an enforcement of long-standing judicial orders. The National Green Tribunal (NGT) already mandated these age-based limits on petrol sales in 2014-15, and the Supreme Court reaffirmed them in its 2018 ruling in the *MC Mehta* case. While the identification and impounding of aged vehicles is a routine annual exercise during the high-pollution winter months, the CAQM directive extends this effort year-round and brings fuel stations into the enforcement framework in a staggered manner, starting with Delhi and adjoining districts and eventually covering the larger NCR.

To help evaluate the intent and effectiveness of the directive, it is useful to revisit how vehicle

emission norms have progressed in India and why older vehicles remain a concern.

India's transition from Bharat Stage (BS) I to BS VI emission norms has drastically improved vehicle emission standards. The concern is not about a vehicle's age, but about what age represents. Older vehicles are equipped with outdated and more polluting technology. Older vehicles that only comply with BS II or BS III norms emit pollutants at levels many times higher than BS VI vehicles. Indeed, under laboratory conditions, the older BS II limits allow diesel cars to emit a staggering 18 times more particulate matter than BS VI limits. Even BS IV limits allow the diesel cars to emit five times more.

More troublingly, research on real-world vehicle emissions in Delhi and Gurugram led by The Real Urban Emissions (TRUE) and the International Council on Clean Transportation (ICCT) found that exhaust emissions under actual driving conditions are significantly higher than the levels found in the lab.

Would a PUC test be enough to address this urgent problem? For petrol and CNG vehicles, PUC tests measure only carbon monoxide and hydrocarbons; for diesel, a less reliable measure of opacity (or how much light is blocked by emissions) is used as a loose proxy for PM emissions. The PUC testing regime could be more reliable if it were supplemented with real-world emissions monitoring tools such as remote sensing.

While using vehicle age as a criterion is a sensible starting point supported by legal precedent, a more effective long-term strategy would involve identifying and targeting high-emitters through real-world screening. These vehicles could then be subjected to further checks, such as PUC re-testing or chassis dynamometer testing, to inform deregistration decisions.

Delhi continues to rank among the world's most polluted capital cities, with elevated levels of PM2.5 and PM10 persisting throughout the year. Vehicular emissions remain a major contributor,



Delhi and India more broadly need structural policies that accelerate the transition to clean electric vehicles (EVs).

particularly to PM2.5 and nitrogen oxide (NOx), both of which have serious health and environmental consequences.

The harm this pollution inflicts on public health is well documented. The citizens of Delhi face increased rates of asthma and cardiovascular disease, adverse pregnancy outcomes, and reduced life expectancy. Moreover, vulnerable and lower-income residents (who often live near high-traffic corridors) bear the brunt of pollution's impacts.

Clean air is a shared right, not a private entitlement. While restricting older vehicles is an effective first step to reduce emissions, our broader goal should be to identify and address high-emitting vehicles, regardless of age, through real-world monitoring using remote sensing and follow-up testing. Ensuring cleaner air through targeted, data-driven emissions control is not only an environmental priority but also a public health and social justice imperative.

While CAQM's directive is a welcome step, it addresses only part of the problem. Phasing out end-of-life vehicles reduces the stock of heavy polluters but does not necessarily accelerate the shift to zero-emission mobility.

To make more meaningful progress, Delhi and India more broadly need structural policies that accelerate the transition to clean electric vehicles (EVs). Critically, we must move the responsibility for shifting to clean transport from buyers to sellers through a Zero-Emission Vehicle (ZEV) sales requirement. These mandates, already imple-

mented in markets like California and China, require automakers to sell a minimum percentage of ZEVs each year. ZEV sales requirements ensure consistent supply, reduce costs for consumers through scale and competition, and make electric mobility the default choice rather than the exception.

Delhi has made commendable progress through its EV policy and investments in public electric buses and last-mile delivery vehicles. But voluntary programmes and incentives alone may be insufficient. A ZEV sales mandate (paired with scrappage incentives and robust public charging infrastructure) can create a decisive shift in the market and support domestic manufacturing goals.

CAQM's policy is not about penalising people who own older, more polluting vehicles, but about enforcing court orders to protect public health. While age-based rules offer a starting point, more effective long-term solutions lie in identifying high emitters through real-world monitoring and acting on actual emissions data.

To make real, lasting progress, Delhi and other NCR states must go beyond enforcement. A ZEV mandate, backed by public investment and clear regulatory direction, will ensure the transition from reactive enforcement to proactive transformation.

Amit Bhatt is India managing director, and Anuradh Naria is a researcher, ICCT. The views expressed are personal.

Inclusions and exclusions
in India's forest governance

Thirty years ago, when a landlord approached the Supreme Court seeking deforestation in the Nilgiris Hills, little did he know that his petition would deeply entrench the role of judiciary in forest governance. Since then, the Court has delivered orders and judgments in the continuing case of *YM Godavarman Thirumalpad v. Union of India* and has shaped India's forest policy. Responding to interstate applications, the Court has made decisions with respect to timber trade, operation of saw mills and the functioning of national parks. It also created the Central Empowered Committee (CEC) to monitor the implementation of forest-related orders, and decided the price of forests and rules for compensatory afforestation. Godavarman orders have expanded the role of the State, especially the Centre, in forest conservation.

However, forest-dwelling people are equally important stakeholders. Their land rights and participation in decision-making on forest management are key to successful conservation. It is in this context that two recent judgments of the apex court in the Godavarman case (in *Re. Anan Singh, December 18, 2024*; and in *Re. Zudip Jangle Lands, May 22, 2025*) offer compelling insights into the evolving direction of forest governance. In both cases, the Court considered the question of protecting landscapes that are not usually imagined as forests — grasslands known as Orans in Rajasthan and uncultivated grazing and scrub lands in Vidarbha, Maharashtra known as Zudip lands. Orans, historically protected by agro-pastoral communities, are now threatened by renewable energy projects in the Thar desert. In the case of

Zudip lands, whether they are a forest at all has been a matter of conflict between the state of Maharashtra and the Centre for several decades.

The question of what is a forest has been inextricably linked to the question of who owns and who should govern forests. The colonial State saw vast uncultivated landscapes as source of valuable timber and reserved them as State-owned forests in the 19th century. However, their imagination of forests as tree-covered land ignored the complex mosaic of landscapes that existed, from grasslands and shrublands to savanna and deserts. We call this an arboreal imaginary as the colonial forest department favoured commercially valuable trees like teak, pine and sal over shrubs and grasses. They and their postcolonial successors forced a binary between forest and non-forest land and prioritised legal ownership over complex histories of informal, customary uses of the forest.

The Supreme Court's *Godavarman* order (1996) extended protection under the Forest Conservation Act (FCA) 1980 to all areas that adhered to the dictionary meaning of forests and "any area recorded as forest in the government record irrespective of ownership". Thus, Godavarman continued with the idea that only an agglomeration of trees made a forest and neglected other terrestrial ecosystems. Such landscapes, known as Open Natural Ecosystems (ONEs), are critically important and harbour several endangered species.

ONEs are often recorded as wastelands or village commons in public records and are easily diverted for industrial and infrastructure projects. The narratives of degradation and deforestation that underpinned the Godavarman judgment also privileged the view of forests as stable end points of ecological succession that are always negatively affected by human activities. Within ecological science, however, this view has been challenged. Forests are seen not as pristine nature but as dynamic ecosystems that respond to both natural and human-induced disturbances. From the Terai grasslands to the dry deciduous forests in central India and the evergreen forests of the Eastern Himalayas, the ecosystem structure and function of forests have been shaped by centuries of human use including fire, livestock grazing, and shifting cultivation.

Godavarman legitimised the role of the Centre as the pre-eminent institutional agent of forest conservation through the FCA. After 1996, any landscape covered by the dictionary definition of forest is protected by the FCA and the Centre's approval is required for its diversion for non-forest purposes. This centralising tendency in forest governance has been reinforced by subsequent models of conservation and national legislations such as Forest Rights Act, 2006 (FRA) that recognise the habitation and livelihood rights of forest dwellers.

The Supreme Court has now expanded the definition of forests beyond the original Godavarman view. It has extended the applicability of FCA to Orans and Zudip lands. Telling the Rajasthan government that all Orans must be classified as forests, the Court approved the recommendation of the CEC viz., "In Rajasthan, large arid areas with sparse vegetation, grasslands and unique desert ecosystems,

including rocky outcrops and stony deserts, should be considered as 'forestland'". For the Court, the way forward seems to be that ONEs and other terrestrial ecosystems should be classified as forests and brought under the ambit of FCA. While seeing the forests beyond the arboreal imaginary is welcome, is FCA the most appropriate way of extending statutory protections to ONEs? Especially when, from 2008 to 2023, the Centre allowed the diversion of 300,000 hectares of forests to build highways, large dams and mines. In the case of Orans, despite noting the local community's role in their conservation over centuries, the Court does not seem to favour community ownership and governance. Although it recommends that they may be declared as community reserves under the Wildlife Protection Act, the emphasis of final directions is on statutory protection under FCA. In the case of Zudip lands, the court has directed they should be handed over to the forest department and be used for compensatory afforestation, seeing them as degraded forests to be reforested under State control.

This perpetuates the arboreal imaginary and excludes community-based conservation of ONEs. Unfortunately, the court did not acknowledge the dependence of tribal communities on Zudip lands and their protests against the classification of these lands as State-owned forests. In both the judgments, the court did not involve FRA to promote community-based conservation. This goes against overhauling research that local communities have a greater stake in ONEs and have frequently performed better than State in conservation of forests. It is time to recognise and prioritise the social, cultural and ecological forest over the legal forest.

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Correcting the image
of the higher judiciary

Former Supreme Court judge Madan Lokur is known for his candour and courage. His occasional pungent comments on a wide array of subjects were quite a draw when he was on the Bench and also thereafter. He never minced words even when discretion and silence were an alternative option. He often publicly speaks his mind about several issues pertaining to the Indian judiciary. His criticisms often focus on the executive's attempts to link with the independence of the judiciary. Not everybody will agree with his criticisms, but these certainly can't be ignored or glossed over.

At the recent World Justice Forum in Warsaw recently, Lokur was categorical that there were many aspects of our judiciary which should cause us concern. Pointing out

India's low rank (79/142) in the World Justice Project's *Rule of Law Index*, he stated that this showed the country in a very poor light. The emphasis during his address was on the judiciary's relations with the executive. He threw more than a hint that governments were uncomfortable with independent judges and said delays in approving the recommendations of the apex court's collegium on judicial appointments had become far too frequent for comfort. Also, the executive was not acting fast in cases of corruption in the judiciary brought to its notice. He also referred to the huge backlog of cases in Indian courts. These criticisms need to be taken seriously because

the country is doing so well on the economic front and cannot afford a poor image for its judiciary. From geopolitical standing to investment attractiveness, much will be at risk if such an image of the judiciary persists.

Except for an occasional undignified debate or two, we have had a good record in respect of the higher judiciary. Even in connection with the recent episode involving Justice Yashwant Varma of the Delhi High Court, comments by the Supreme Court have been level-headed and unprovoked. The Court cannot be said of the lower judiciary where there have been vituperative exchanges across the country's courts. What Lokur said in Warsaw was not anything that we did not already know. It has also been repeatedly said that in no other country are judges chosen by the judiciary itself. India is different and the Supreme Court has given itself this unique privilege. There is no point in getting exercised about it, unless it is proved that a nominee of the collegium which chooses him or her is a known dubi-

ous individual with no credentials at all.

Save for a few exceptions we have had none that do not excite the ire of citizens populating the Bench at the Supreme Court and the high courts. The case of Justice Varma, formerly of the Delhi HC, is more an aberration than the norm. There is a reasonable sound system of vetting of candidates for appointment to the judiciary that ensures a bad choice does not get made. If a nominee decides to be dishonest, the fault is not that of the system but that of the frailty of human nature.

The same applies to partisanship. In every high court, there are individual judges with a predilection, normally subtle and occasionally uncontrolled. Here again, suspicion of a bias colouring a decision is not good enough to paint a judge as unworthy. It is only fair that we should look for the legal correctness of a decision rather than hunt for misdeemeanor.

RK Raghavan is a former director of the Central Bureau of Investigation. The views expressed are personal.

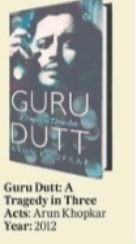
[EDITOR'S PICK]

HT's editors offer a book recommendation every Saturday, which provides history, context, and helps understand recent news events

THE MASTER OF MELANCHOLIA

An artist's work is often the best way to know their mind. But when a biography focuses on their work, it can offer a more studied gaze. With Guru Dutt's 100th birth anniversary just past — on July 9 — we recommend this week's *Guru Dutt: A Tragedy in Three Acts*, by Arun Khopkar, the National Award-winning director, actor and author.

An auteur in every sense, Dutt made sorrow and disillusionment seem poetic. Khopkar focuses on three of Dutt's films — *Pyasa* (in which a poor deals with the world's cruelties), *Kaagaz Ke Fanoon* (about a film director's disillusionment and attempt to come to terms with failure), and *Sahib Bibi aur Ghulam* (a languid exploration of failed romance and marital loneliness) — to discuss the master of melancholia's craft and what it reflected of how Dutt saw the world around him and his own profession. Khopkar's book presents the ace film-maker as being shaped by his work as much as being his creator.



Guru Dutt: A Tragedy in Three Acts. Arun Khopkar. Year: 2012

Can China compete in the AI talent war?



CATHERINE THORBECKE

The latest eye-watering artificial intelligence (AI) outlays aren't going toward high-end chips or data-centre buildouts, but individuals.

The competition for AI talent prompted Meta Platforms Inc to reportedly offer sign-on bonuses of \$60 million to lure senior staff from rivals. It feels "as if someone has broken into our home and stolen some-

thing," OpenAI's chief research officer said of the aggressive poaching in a memo to staff obtained by *Wired*. The latest victim: Apple Inc, which just lost top executive Rounding Pang to Meta.

It's telling that so many of the superstar players United States (US) tech titans are boasting about including their rosters are of Chinese origin. Adding Pang, eight out of the 12 new recruits to the Meta Superintelligence Labs team graduated from universities on the mainland before pursuing careers abroad. It means that a key driver of the global AI race is an intense scramble for the people building it: Chinese talent.

The outside role that they play in developing AI systems for its geopolitical rival isn't likely lost on Beijing. In other tech fields where western hold a knowledge advantage, the government hasn't been afraid of asking them to return home. Authorities have

already reportedly restricted travel for some of DeepSeek's employees. Instead of cracking down on immigration, US policymakers must now do more to entice the best and brightest from China and beyond and create an environment where they are likely to stay.

But American business leaders shouldn't assume that the big paychecks alone will win an international talent contest. Researchers at Harvard University last month said that the number of high-impact scientific publications shows that China dominates in "raw human capital for AI." This helps drive indigenous research despite US advantages in computing power and investment. Top workers may still be keen on making money overseas, but that doesn't mean a lot of them won't stay at home.

Separate researchers at Stanford University in May analysed data on the more

than 200 authors listed on DeepSeek's technical papers. The firm's success story is "fundamentally, one of homegrown talent," they found. Half of DeepSeek's team never left China for education or work, and those who did ultimately returned to pursue AI development. This has policy implications for the US.

China looks at international experience less as a brain drain and more as a way for researchers to acquire knowledge before returning home, the Stanford paper said. The US "may be mistakenly assuming it has a permanent talent lead."

It aligns with other data that suggests America has been losing its allure as a destination for top-tier AI researchers. Only 42 per cent of these individuals worked in the US in 2022, compared to 59 per cent in 2019. During that same period, China was closing the gap fast, rising to 28 per cent from 11 per cent.

The Chinese government, meanwhile, has been funding AI labs and research at universities as part of industrial policy. It's not clear how this investment has paid off, but it has helped incubate talent who went on to support breakthroughs at private companies. One of DeepSeek's key-people, for example, was co-authored by scholars at Tsinghua University, Peking University and Nanjing University. In this way, China has been building up an ecosystem of innovation that doesn't centre around poaching individual star players.

Domestic firms are less able to spend so lavishly to attract top talent. US private investment in AI was nearly 12 times the amount in China, according to one analysis. Earlier this year, state-backed news outlet the *Global Times* reported on the "high-paying job offers" from DeepSeek, which could amount to annual income of some 1.54 million yuan per year (just under \$21.6 million). It's a significant sum in urban China, but hardly the instant millionaire-minting figures

being tossed around in Silicon Valley. DeepSeek is nonetheless in the midst of a recruiting blitz — one that's trying to attract overseas Chinese AI researchers to come back home. It has posted a spate of roles on LinkedIn, a platform that's not used domestically. As my colleague Dave Lee has written, this is about more than just money, but instead convincing workers that their contribution "will matter most in the history books." DeepSeek may be hoping that this pitch will work on homesick Chinese talent. Ultimately, just under half of the world's top-tier AI researchers come from China, compared to 18 per cent from the US. Many may be seeking opportunities abroad, but Beijing is pulling all its levers to convince at least some to stay at a time when America isn't signalling a warm welcome. Mind boggling sign-on bonuses from Silicon Valley may be enough to win a cross-border battle for talent, but time will tell if it's enough to win the war.

Bloomberg



ILLUSTRATION: BINAY SINHA

In defence of short-sellers



VIEWPOINT

DEVANGSHU DATTA

The Viceroy-Vedanta affair that is currently front page news has similarities with the Hindenburg-Adani affair. In both cases, an overseas entity went short on a well-known group, and released reports explaining why. I'm not here to discuss the merits of the reports. It's up to traders who wish to take exposures (long or short) to make their own judgements.

There are other interesting points one can make. The strategy of taking a position and then publicly revealing the position, and taking up the rationale is not new. Long investors have been doing this for over a century. In the early 2000s, short-sellers like Mark Cuban also started employing this strategy. The difference is that they started telling the world why they had sold a stock.

The logic for revealing exposure is the same. The hope that more money piles into the trade, and creates momentum to move the price quickly in favour of the early bird. It's a creative use of the concept of disclosure.

One key difference in the 21st century is the scale of amplification. The media reach of any random trader is

much more. The subreddit Wall Street Bets (WSB) is an extreme example of reach. WSB hosts millions of retail traders and some of them are very savvy. WSB is unusual in that the research is often of high quality.

Successful traders who use WSB and publicly announce their positions along with the rationale have inspired millions of followers who enthusiastically mirror their trades. The money can run into the billions. On several occasions, hedge funds have been rendered bankrupt by the concerted retail action on WSB. Of course, on countless occasions, retail traders who mirrored positions without knowing what they're doing have also been wiped out.

While WSB is the largest public forum for traders, it is not the only one. There are countless groups on all sorts of platforms where people discuss trades and seek second opinions on their views. And yes, those forums are also places where "pump and dump" schemes, and other scams are enabled. But surely it's up to any trader to do their own due diligence before taking a trade on the basis of a social media tip, or TV channel recommendation, or random research report?

So much for the modus operandi of taking trade and then publicly talking about it and revealing the underlying logic. A deeper point is that this practice can't be stopped. Right or wrong, if somebody decides to take a position, long or short, and talk about it, they have a right to do so.

They may be sued if they vilify the company or its management, and they may lose a lot of money if they're wrong in their logic. But they have the right to

hold an opinion and to air it. And so long as they're trading through legal channels, they have the right to lose money — or make it.

Both these cases have also led to a lot of absurd nationalistic heartburn: Why were Indian businesses targeted by foreigners, for instance, is a question that's been asked. The answer is, those specific businesses were perceived as being vulnerable.

This is the flip side of the equation when economies and markets are opened up to allow overseas investors to buy shares and subscribe to bonds; you must live with the fact that foreigners may also sometimes sell shares and bonds. It cannot be one-way traffic.

Short-sellers receive a lot of opprobrium. Regulators hate them. They operate under inherent trust and disadvantages. A share can double or quadruple or multiply tenfold. So the upside is unlimited for a long investor. But a share can at worst, drop to zero value, and that limits the short-seller's return. Obviously, leverage and the use of derivatives can overcome this to an extent but taking recourse to those, adds to the risks as well.

When they put a spotlight on overvaluation, those who identified the "Big Short" in US housing mortgages, helped warn others. When shorts are based on perceived corporate mismanagement or malfeasance, as in cases like Enron and Satyam, they enable the financial system to work efficiently.

Shortselling is the obverse of value investing in that sense. There should be room for short-sellers in any well-run market.

Bhagwat sets off jitters at 75

BJP had no dynastic succession, at least not at the top. You can trace this back to the Vajpayee-Advani era. This act of spotting and empowering younger talent is even more striking with the choice of BJP presidents

Please do not fall into the trap of the usual clichés like "setting the cat among the pigeons" over the statement by Rashtriya Swayamsevak Sangh (RSS) chief (Sarsangchalak) Mohan Bhagwat that, once they attain the age of 75, leaders should think of retiring and yield to younger colleagues.

This caution is needed because in the Bharatiya Janata Party (BJP), and particularly the BJP-RSS relations, there will always be the Modi exception. To think that this is a nudge to Prime Minister Narendra Modi to step down as he turns 75 on September 17 this year, six days after Mr Bhagwat, would be reading too much into it. However, a Sarsangchalak is never to be taken lightly. In this case, Mr Bhagwat broke from a speech in Marathi to speak in Hindi, these, retirement-at-75 lines in Hindi. No slip of the tongue, or scope for misinterpretation there.

I anticipate an immediate questioning of this from those who follow national politics closely. They can indeed remind me of my own two-part conversation with then RSS chief K S Sudarshan in 2005, where he asked Atal Bihari Vajpayee (80) and I. K. Advani (77) to move on and let younger people take over. He had also attacked Vajpayee's son-in-law, close associate Brajesh Mishra, and his style of working. His response became even more vehement when I reminded him that Vajpayee had dismissed himself with his retirement with that famous line "Na humin, na retired."

Since the Vajpayee-Advani duo was still very much in control of the BJP and widely respected as its founders, and also because there was no ready claimant for their places at that point, Sudarshan drew immediate criticism, though only in whispers. It was insinuated that his ageing mind was fading. The reality was different. From the BJP-RSS point of view, if he could be faulted, it was only for his timing. It was too soon after the party's defeat in the general elections the previous year and the party didn't need a succession struggle right then. In substance, he knew what he was doing, and was vindicated in the course of time.

With his words, the die was cast. An entire line of likely successors had begun to emerge. Rajnath Singh, Suhansu Swari, Arun Jaidya, Nitin Gadkari and, most notably, Narendra Modi in Ahmedabad. In a way, he had set up an American primaries-style leadership con-

test within the BJP. Mr Modi won it by the time he swept his third state election in 2012.

Whether or not you like the BJP/RSS, you have to concede that they are the force with the most robust and meritorious HR system in Indian politics. Through decades, they have produced successive generations of leaders, with the shakha system.

It's a digression, but a significant point — that of all the parties in India's political history, the BJP has had the least defections or splits. The ideological glue mostly keeps them all in the same tent, even the disgruntled. A few significant ones who left returned, like Kalyan Singh and Yeddyurappa. Others, Shankersinh Vaghela, Balraj Madhok, and others, have stayed away.

In the same decades, the Congress has had so many splits that sometimes it seemed the entire alphabet might not be enough to find letters as suffixes for all its breakaway parties. The Janata Party, Lok Dal, or what used to be the Lok Satta, all went the same way. Not the BJP? You can't show me a hyped-up offshoot.

The BJP also had no dynastic succession, at least at the top. There are many offsprings of illustrious founders and elders in key positions in the party now, but the succession was never straightforward. It was more about "accommodating" somebody's child than a power transfer.

You can trace it back to the Vajpayee-Advani era. These were young chief ministers: Vasundhara Raje, Shriyash Chouhan, Raman Singh, Narendra Modi — averaging 49 years.

This spotting and empowering of younger talent is even more striking with the choice of the BJP presidents. In 2002, Venkiah Naidu became president at 53. Rajnath Singh became president at 54 in 2005, Nitin Gadkari at 48 in 2009, and Amit Shah at just 49 in 2014.

In contrast, through this period, Sonia Gandhi remained the Congress president, until Mallikarjun Kharge moved in after a Rahul Gandhi interregnum, sprightly still, but 80. Meanwhile, so much of the Congress party's young talent has withered away. Some have joined the BJP in frustration; others carry on in the party, even more frustrated. We make too much of the ideological differences between the two parties. We ought to be paying more attention to their respective HR practices.

NATIONAL INTEREST
SHEKHAR GUPTA

This principle has been followed even post-2014. J P Nadda took over as the party president at 59. The new chief ministers, Rajaditya (UP), Bhajan Lal Sharma (Rajasthan), Mohan Yadav (Madhya Pradesh), Vishnu Deo Sol, Mohan Charan Majhi, Biplob Deb and Himanta Biswa Sarma (Assam), Congress chief in Gujarat, Kanubhai Lal Khattar, Devendra Fadnis, Pramod Sawant, Pushkar Singh Dhami, Keshu Gupta, the 12 of them, averaged 51 when sworn in.

The Congress has inducted some younger talent in Telangana and Himachal, but in its most important state, Karnataka, it is stuck with a non-performing golden oldie in Siddaramaiah.

A most notable fact is that the ideological guru of the BJP is living up to his own counsel. The oldest active member in a Sarsangchalak has served 78: Sudarshan (2009), Rajendra Singh or Rajju Bhargava, in 2000, Madhukar Dattatraya "Balasaheb" Deoras, (1994).

From the founder group, K B Hedgewar and M S Golwalkar died young while still in office, at 51 and 67 in 1940 and 1973, respectively. All the Sarsangchalaks rose to the top, and had long tenures. As does the current one.

The fact is that despite the rumours and whispers, nobody has mentioned any retirement-at-75 within the BJP. It was only whispered as the justification to send Mr Advani, Murli Manohar Joshi and others into retirement in the Margdarshak Mandal (Group of Elders). At the same time, some ministers continued, including Kailash Mishra and Najma Heptulla. These were subsequently sent out as governors. In the latest election, Hema Malini was fielded from Mathura, though she had crossed 75, maybe to remind us that there is no "75-year-rule." The only on-record reference we can find is Anandiben Patel explaining her resignation as Gujarat chief minister in 2016 because "I have turned 75." That will for sure be no precedent for the future.

September 11 will now be the date to watch. That's when Bhagwat turns 75. If he decides to follow his own counsel and retire, there will at least be "talk" about Mr Modi in the BJP corridors. Will there be a challenge? No. Will anybody dare to seek a process of post-2009 style "primaries"? It isn't impossible, but most unlikely. But, as the calendar runs up to late 2028, some among the more ambitious in the BJP might feel impatient. Nobody would dare to even whisper, forget making a claim. Mr Modi now has the power and pre-eminence in the BJP-RSS to choose how long he wants to serve, and he is definitely going to want to contest in 2029. He will only be 79, as old as Donald Trump now, and fitter. The others will have to wait for the decision or a cue from him, even as some silent subterranean "primaries" might have begun within the BJP.

By special arrangement with ThePrint

Cricket's spirit lives

EYE CULTURE
UDDALOK BHATTACHARYA

Cricket, a team game no doubt, has enormous scope for an individual outshining the rest. This characteristic of cricket, the preponderance of numbers speaking for players' performance, somewhat sets it apart from other team games. A cricketer's tour de force goes into record books in statistical hierarchy. And there is nothing unorthodox in being ahead of others on any count. So had South African Captain Wiaan Mulder broken the great Brian Lara's record of the highest runs in a Test innings, no moral calamity would have fastened on him for doing it. Yet he declared the innings when he was just 34 runs away from reaching the apogee because Lara, he felt, deserved to be where he was. And by doing this he made many recall the sporting gesture of Lara himself. Some 35 years ago, the West Indian declared himself out in a Test in India when he was nine runs away from 100. Sunil Gavaskar, then a newspaper writer, applauded the action, saying: "Well done, Brian!"

Gavaskar had to face hostility for breaking Don Bradman's record of the highest number of centuries, 29, in Test cricket. For a long time, there was speculation as to whether he would do it. After he equalled and broke Sir Don's record in the same

series, against a very strong West Indian team in 1983, a great Australian cricketer remarked: "It is a sin to even think of breaking Bradman's record." What could Gavaskar do otherwise? Play on without centuries for the rest of his career?

Gavaskar's record too has gone long since.

Speaking of Bradman, another Indian cricketer, B B Nimbalkar, came close to breaking the Australian's record of the highest runs in an innings in first-class cricket. Bradman's was 452, and when Nimbalkar in a domestic match reached 443, the opponent, fearing that an unbroken record would go to glory, asked him to stop. The world's all-time greatest batsman, conceded the match and left the field.

The record of 452 could not stand up to the changeableness of time. The legendary Hanif Mohammad broke it, and his too was made a speck in the dust by guess who, Brian Lara.

Some records, alas, are virtually unbreakable. The first that comes to mind is Jim Laker's 19 wickets in a Test, back in the 1950s, against the Australians. The second, though not so invincible, is Sydney Barnes' 49 wickets in a series (it was a four-Test series) more than 100 years ago. Jack Hobbs's record of the highest number of first-class centuries too stands for about 100 years, perhaps because players these days do not take

domestic cricket seriously. However, it is surprising that Bradman's record of the highest runs in a series (574, against England in 1930) is there like a rock even today, when triple centuries are plentiful. But his average of 99.94? The wait to see it broken has to be long. Records can be seen in various ways. The quickest 100 can be in terms of the number of balls faced. Here Sir Vivian Richards led his top position some years ago after holding it for about 30 years. But in terms of minutes, the record, set in 1921, is with Jack Gregory, better-known as a bowler who, with Ted McDonald, formed cricket's first fast-bowling pair.

This has been Bradman's famous line — the scoreboard is an ass — seems outdated in this day and age when a cricketer's worth is largely the person's brand value. The heft of a record lies not just in the awe it evokes and also in the money it brings. In the light of this, it is palpable that what Mulder did is out of character with the times.

In Australia in the 1940s, it was a different Barnes, Sydney Barnes, who threw away his wicket when he was batting at 234 because at that cricket ground it was Bradman who held the record with the same score. Barnes did not want to go past Bradman. Instead he wanted to see his name with him. For him, it was a matter of pride with self-expression. For Mulder, it is humility and reverence for the spirit of this great game. Well done, sir!

America stays unique

TICKER
MIHIR S SHARMA

Even if the United States' (US) economic and military power declines over the coming decades, its cultural power will not. Records can be seen in various ways. The quickest 100 can be in terms of the number of balls faced. Here Sir Vivian Richards led his top position some years ago after holding it for about 30 years. But in terms of minutes, the record, set in 1921, is with Jack Gregory, better-known as a bowler who, with Ted McDonald, formed cricket's first fast-bowling pair.

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of the world revolves.

Let's look at two very different ways in which American politics has infected countries with very different social and economic structures.

The US has a particular, almost unique, history of racial oppression on its own territory. Some other countries — Brazil, for example — were also partially built by the slave trade, and have a history of legalised slavery as long as, or longer, than America. But the combination of chattel slavery, constitutional civil rights, and generations of racial segregation in the US is not replicable elsewhere. It means that how American politics deals with, or responds to, questions of relations between races or ethnicities is not exactly replicable elsewhere.

Concretely, it means that when racial resentment in the US explodes one way or another — through Black Lives Matters protests or a mass defection of young Hispanic men to Donald Trump — it is a product of a very particular, unstable racial consensus in a very particular, unstable society. Other countries with ethnic or racial tensions cannot take to the debt from it. In Europe, racial minor-

ities have a very different history from that of African-Americans; in India, caste discrimination is often compared to racial discrimination, but the successful Hinduisation agenda of the Bharatiya Janata Party shows that is very different in how it can be adapted for politics. The rest of the world can continue to be interested and engaged in how the US moves towards a better racial politics — but must always remember that nothing about it is relevant for us in our countries.

The second way in which the US is unique is in how it approaches the role of government. The legend is that Americans prefer small government. And to an extent this is correct: Government expenditure in the US is around 36 per cent of gross domestic product (GDP), as compared to 41 per cent in Japan or 47 per cent in Sweden.

It is also true that the US simply does not have any conception of what a Budget constraint is. Its federal government deficit as a percentage of GDP is 6.3 per cent, according to the Federal Reserve Bank of St. Louis. Mr Trump's new Budget Bill cannot take to the debt without any real plan to prevent

it from ballooning.

No other country can get away with such fiscal impropriety — not even the government of the United Kingdom, which has the longest and deepest financial history of any economy. And yet, economic debates and currents in the US — from industrial policy to deregulation and capital gains tax — are believed to have some implication for the economic policies in the rest of the world. Do they really? Even when the most important constraint in public finance — the government's Budget constraint — does not seem to apply?

It is simply dangerous to expect that any country can replicate or learn effective policy lessons from US subsidies, its trade policies, its research focus, its tax structure, or its regulatory debates when all of these are so different one way or another on the fact that the US Treasury can borrow apparently unlimited amounts of money from the financial markets, and nobody else can.

We are all obsessed with the US, and US politics and policy making, and will continue to be for decades. But let's please do so as interested observers, not as participants, or as students.

Lambs to slaughter

Retail derivative trades dip, but huge losses continue

If anyone needed evidence that India's derivative market is no place for retail folk, data contained in SEBI's (Securities and Exchange Board of India) recent interim order against the Jane Street group provided it. SEBI found that Jane Street entities pocketed gains of about ₹36,500 crore from derivatives trades over a two-year period, mainly by exploiting infirmities in India's cash and equity derivative markets. If one global quant firm used this route to make big profits, it is likely that others do too.



Derivatives trading is a zero-sum game. Therefore, it is Indian retail investors as counter-parties to these trades, who are footing losses. SEBI's latest study on trading patterns in equity derivatives shows that its active regulatory interventions to keep individual traders off this segment have yielded mixed results. Since 2024, SEBI has initiated a host of measures to discourage retail investors from trading in derivatives. It has asked exchanges to rationalise weekly contracts and streamline expiry dates, hiked contract sizes two-to-threefold and mandated upfront collection of option premiums, while tightening monitoring. The December 2024 to May 2025 period saw average daily traded value in the equity derivatives segment fall by 5 per cent and index options trades fall by 9 per cent. This suggests a cooling off from the 23 per cent and 72 per cent annualised growth rates in these two segments in last five years. But as the cash market also saw an 11 per cent decline in trades in this period, it is tough to gauge if the muted activity was due to regulatory tightening or bearish markets.

Individual traders cut back their equity derivative trades by 11 per cent in December 2024 to May 2025 compared to the same period last year. The number of unique traders dabbling in derivatives also fell 20 per cent, from 84 lakh to 67.5 lakh. About 8 lakh individuals punting small sums of up to ₹1 lakh accounted for much of this decline. This is good news. However, if retail investors moderated trading mainly because of the pause in the bull phase, they may return after the market's recent rally. Also worrying is the fact that despite fewer investors trading derivatives, retail losses in F&O at ₹1.05 lakh crore in FY25, were 40 per cent higher than FY24. This number has steadily mounted from ₹40,820 crore in FY22. There is also no change in the proportion of individual traders making losses in F&O at over 90 per cent since FY22. This shows that retail investors are not getting more skilled at derivative trades.

These trends present a hard choice for SEBI. A strict crack-down, with measures such as a complete phase-out of weekly options contracts, can dent commercial prospects for the many players dependent on the capital market ecosystem. But allowing retail investors to be led to slaughter by global quant firms leads to a flight of precious household savings from India. SEBI can perhaps look at a tighter product suitability framework and more restricted retail entry norms into derivatives.

OTHER VOICES.

The Guardian

Putin may be gaining ground, but he is not winning

European leaders gathered in Rome on Thursday for a conference on Ukrainian recovery, but endurance remains the priority. Russia has intensified its assault with punishing strikes far beyond the frontline—including a record 728 drones and 13 missiles one day before the conference. The UN said that civilian casualties last month were at their highest for three years, with at least 232 people killed and 1,343 injured. Russia's brutal offensive aims to break Ukraine's spirit and European solidarity. Even Donald Trump appears to be realising, with encouragement, that Moscow is not interested in peace. For Mr Trump, maximalism is a negotiating tactic, he does not recognise that for Vladimir Putin it reflects a fixation. Yet this week he acknowledged "We get a lot of bullshit thrown at us by Putin... He's very nice all the time, but it turns out to be meaningless." —LONDON, JULY 10

THE WALL STREET JOURNAL

What's Trump's Next Move on Iran?

The aftermath of the 12-day war with Iran looks mixed more than two weeks later. Iran's nuclear program was badly damaged and likely set back for years. But the Ayatollahi government isn't admitting defeat and shows no signs of dropping its revolutionary or nuclear designs. That puts into focus the next policy question for the U.S.: Will Mr. Trump's cease-fire give way to diplomacy that depends on the achievements of the war, or will it put those achievements at risk? Iran is still talking tough and rejecting Mr. Trump's demands, even after failing out of the fight with Israel and failing to respond in any serious way to the U.S. strikes. In a video message released several days after the U.S. bombing, a far-right Ayatollahi Ali Khamenei claimed that the U.S. had "invited to rescue Israel, and that Iran had 'deserted America's ship in the face.'" —NEW YORK, JULY 10

Do low interest rates spur growth?

GROWTH STORY. The link between policy rates and GDP growth is ambiguous. Demand factors also have a major play



MADAN SABNAVIS

After having reduced the policy repo rate by 100 bps in quick succession since February 2025, under the current circumstances, monetary policy is left with very limited space to support growth". These were significant words in the Governor's statement on monetary policy in June. This also probably points to the limitations of monetary policy in pushing growth beyond a point as there are other factors at play which have to also fall in place.

In a facetious manner it can be said that if bringing the policy rate to zero by all central banks can spur growth, then there should be high growth across the world. But this is not how it works as interest rates, with the support of transmission, can make an impact only to a certain extent on the growth front.

MONETARY TRANSMISSION

The fundamental question is how does monetary policy transmission work? Lower rates when transmitted by banks enables higher borrowing by customers. But does one borrow merely because rates are low? A company will borrow more only if there is need for investment which is dependent on demand conditions. If there is surplus capacity then borrowing may not be required.

Similarly if an individual is planning to buy a home or car, the cost of capital will not be the clinching factor though it may be a catalyst. When a home loan is taken, there will be phases when rates increase and decrease and hence the borrowing cost will vary over the period of 15-20 years of the loan tenure.

In this context it would be interesting to see how growth in credit and GDP behaved in various interest rate regimes over the last 20 years or so.

There have been essentially 10 interest rate regimes during this period of two decades, with some lasting for just a year. Using regimes has the advantage of taking into account lagged effects of repo rate changes on growth in credit if they involve longer time periods as most models talk of policy working with a hiatus of 3-4 quarters.

The accompanying table gives the path of movement of repo rate along with the average growth in credit and GDP during these periods.



Repo rate impact

Repo regime	Movement in repo	Growth in credit	Growth in GDP	Capacity Utilization rate
FY01-FY05	9 to 6	21.3	6.1	-
FY05-FY08	6 to 7.75	29.1	7.9	-
FY08-FY10	7.75 to 5	17.2	5.5	-
FY10-FY12	5 to 8.5	19.2	6.9	76.3
FY12	8.5 to 7.5	14.1	5.5	78.4
FY14	7.5 to 8	14.0	6.4	74.8
FY14-FY18	8 to 6	9.5	7.6	73.1
FY19	6 to 6.25	13.3	6.5	75.2
FY19-FY22	6.25 to 4	6.8	2.6	67.0
FY22-FY25	4 to 6.25	15.4	7.8	74.5

Source: NSO, RBI

As can be expected the numbers are equivocal. In the four regimes till FY12, growth in credit had been high. However, in both the regimes when the repo rate was increased sharply by 175 bps and 350 bps respectively, GDP growth was higher at 29.1 per cent and 19.2 per cent respectively.

These were also phases when GDP growth was much higher than the two regimes when the repo rate was lowered by 300 bps and 275 bps respectively when growth was 6.1 per cent and 5.5 per cent respectively.

Businesses and individuals' decision to borrow more is spurred more by demand factors than low interest rates

Hence, the sense one gets is that growth in credit is not linked with rates and investment opportunities mattered more. This was the time when investment increased on the back on high capital formation especially in the infrastructure sectors.

The next two regimes can be kept aside as they involved single years and growth in credit was flat at around 14 per cent from a high of 19.2 per cent in the increasing rate regime. The subsequent four regimes went against conventional economic wisdom.

During FY14-18 the repo rate was lowered by 200 bps but growth in credit slowed down to 9.5 per cent while GDP growth was at a high of 7.6 per cent. This was the time when the AQ4 was introduced and bank lending slowed down while growth remained buoyant. FY19 was again a single year regime of

marginally higher rates when credit growth picked up.

The last two regimes are interesting. The FY19-22 period was typified by lowest repo rate and yet growth in credit was low at 6.8 per cent with GDP growth averaging 2.8 per cent. Clearly this was a case of demand falling short which led to lower growth in credit. It was natural that during Covid investment decisions were deferred. This got reversed in the period of FY22-FY25 when rates rose but with GDP growth gathering steam did not come in the way of swift growth in credit.

THE DEMAND SIDE

Therefore, there is reason to believe that interest rate impact on growth in credit and GDP cannot be looked at with a singular lens and the demand side factor has to also be brought in. One indicator of demand is the capacity utilisation rate in industry.

Data is not available for the first three interest rate regimes. The average capacity utilisation rate for the various regimes is presented in the last column based on RBI data. This rate indicates the rise or fall in demand as it reflects the spare capacity in industry. Admittedly, capacity utilisation pertains only to manufacturing and not services or the personal loan segments.

The capacity utilisation trend is quite unambiguous. When the capacity utilisation rate moves up, there is tendency for credit growth to also pick up and vice versa. This shows that interest rate is one tool to drive credit growth but is also contingent on how the demand story evolves. As capacity utilisation rates improve there is a tendency for demand for credit to go up for both working capital and investment purposes.

It may hence be concluded that the RBI's statement is a fair one relating to the impact interest rates can have on growth even if it is assumed that inflation will remain benign given the supply side factors pertaining to food items.

In two of the three phases of high GDP growth, the repo rate had increased while in the third, the policy rate came down but credit growth was in single digit. In the other four phases of lower repo rates, GDP growth was low and the highest achieved was 6.1 per cent in the period FY01-FY05. Therefore, the demand side of the story also needs to play out.

The writer is Chief Economist, Bank of Baroda. Views expressed are personal

Climate finance taxonomy draft needs more teeth

The blueprint is welcome but needs to be refined to effectively garner the funds required for green transition

Amarendra Nandy
Aayush Anand

The draft Climate Finance Taxonomy, now made available for public review by the Finance Ministry, signals a welcome intent to align global capital flows with India's ambitious climate goals. India aims to mobilise ₹162.5 trillion (\$2.5 trillion) in green finance by 2030, even as it navigates the dual challenge of sustaining industrial growth and protecting the livelihoods of millions affected by climate extremes.

The question is, will the taxonomy truly channel investments into sustainable transitions, or will it risk devolving into another bureaucratic ritual of well-meaning symbolism? For any taxonomy to be taken seriously, it must serve three purposes—first, to convey a clear and consistent climate-alignment signal to investors; second, to anchor itself in sound scientific evidence; and third, to actively redirect finance away from high-carbon activities.

Commendably, India's draft attempts to check these boxes by focusing on sectors that matter—power, mobility, buildings, agriculture, and hard-to-abate industries like cement and steel. The draft's inclusive approach, which considers indigenous innovation and phased transitions for MSMEs, deserves credit for departing from rigid,

top-down models often seen in global frameworks.

That said, the draft taxonomy suffers from several inherent contradictions.

First, the most contentious is the inclusion of "cleaner" coal technologies like Advanced Ultra Super-Critical (AUSC) plants within the "transitional" category. The draft justifies this on the grounds of base-load energy security and India's development needs. But by effectively extending a green halo to coal, the taxonomy risks institutionalising precisely the kind of greenwashing it purports to counter.

International investors will carefully weigh this inconsistency. A growing body of research suggests that, under a 2°C scenario, the global fossil fuel sector faces stranded assets worth \$19 trillion by 2050. India, with its coal-heavy power sector, could see average losses of nearly 50 per cent, with fossil fuel firms potentially facing 100 per cent erosion in asset value.

RENEWABLE GAINS

Meanwhile, renewable energy companies are positioned to gain. Oxford's Transition Finance research shows that acting five years earlier could halve transition losses for fossil-heavy firms. Yet, the draft lacks specifics on timelines and phase-out clauses, omissions that may lock the country into carbon-intensive infrastructure.

Second, the taxonomy's initial reliance on qualitative assessments,



GREEN PATH. Funds factor COURTESY: NANGS

with quantitative benchmarks deferred to later phases, could introduce further ambiguity. While this may appear pragmatic, the risk is that the taxonomy stays fuzzy and ineffectual.

Third, the document's governance architecture raises further questions. It is labelled a "living document," meant to evolve with emerging challenges. That could be both its strength and its Achilles heel. Without clearly defined guardrails, "living" can too easily become "drifting". In a country with strong federal asymmetries and uneven administrative capacities, there is a genuine risk of climate commitments being diluted through backdoor lobbying.

Fourth, the taxonomy's handling of financial plumbing also merits reflection. While it delineates "climate-supportive" from "transition-supportive" activities, it

lacks clarity on how India's financial system, i.e., banks, institutional investors, and regulators, will operationalise these categories. The RBI and SEBI have introduced green deposit schemes and ESG disclosure norms, but the taxonomy fails to connect the dots. Without clear institutional alignment—for example, linking SEBI's BRSR framework and RBI's green credit guidelines to taxonomy labels—it risks becoming a standalone document with no real policy traction.

Finally, adaptation finance is another area where ambition outpaces structure. The draft projects a requirement of \$68.8 billion by 2030 but approaches the issue through a narrow, sectoral lens. The problem is that climate risks are systemic. Crop failures lead to migration, which strains urban infrastructure. Water scarcity cascades across industrial supply chains. The UNDRR and Climate Bonds Initiative have advocated cross-sectoral classification schemes for adaptation. India would do well to follow suit, prioritising projects that address multiple sectors to maximise adaptation outcomes.

The taxonomy's ambition is commendable, but refinement and execution will determine whether it catalyses India's green transition.

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LETTERS TO EDITOR Send your letters by email to bleditor@thehindu.co.in or by post to "Letters to the Editor", The Hindu Business Line, Kasturi Buildings, 859-860, Anna Salai, Chennai 600002.

Trump's tariff spree

This refers to Trump's says those not sent tariff letters may face blanket tariffs of 15% or 20% on August 1' (July 11). When will this Trump ignited "tariff fire" die down?

While he could be enjoying the prospect of throwing the world economy into turmoil, those who play with fire are also likely to get their own fingers burnt, sooner or later. One genuinely wishes that the urgently stops calling all this 'self serving' shots as that may eventually back fire too. SK Gupta New Delhi

Apropos news report,

'Trump threatens 500 % tariff...' (July 11), one can't help wondering about the US President Donald Trump's mindset these days. Trump 2.0 is into creating controversies and negative disruptions in the World trade regime. His 500% tariff on importers of Russia oil (which includes India) is audacious. This move will have far-reaching consequences on India as well as other developing countries. This tariff, if imposed, would create substantial havoc on our budgetary expenditure plans and our entire financial management will go for a toss. His whimsical declarations, would damage international trade. The US, being the world's biggest economy, is expected to come out with a pragmatic tariff plan. All countries trading with US should convene a meeting and discuss a whole range of issues with US tariff rates threefold, arrive at a consensus and submit a detailed memorandum to the US President for consideration. Trump also should be more amenable to the suggestions with a view to promoting goodwill amongst the poor nations. Nations should not be spending so much time on tariff policies, time which can be better spent on growth and development issues. Ben Venkateswaran Chennai

Vedanta's debt burden

When short seller Hindenburg came out with a report indicating the Adani group for alleged irregularities, the entire government and media came to his defence in saying that this was a deliberate ploy to undermine India's growth story by vested interests. The same thing happened to Vedanta, when another short seller Viceroy research has accused the company of unsustainable debt. But Anil Agarwal, unlike the Adani group, has been left to fend for himself. For the record after a steep fall, Vedanta is now trading steady on the bourses. Anthony Henriques Mumbai

INDIAN EXPRESS IS NOT AN
INDUSTRY. IT IS A MISSION.

— Ramnath Goenka

IT SECTOR'S GROWTH SUBDUED AS KEY MARKETS STAY CAUTIOUS ON SPENDS

THE first-quarter earnings season has just begun and the Indian IT sector is flashing amber. TCS, the industry bellwether, turned in a decent set of numbers for Q1, but flagged concerns about geopolitical uncertainties dragging down demand and upsetting markets. Importantly, TCS's international revenue shrank 0.5 percent in Q1. Even domestic revenues remained lacklustre, largely because of the tapering of a large BSNL order. Overall, the company noted its order pipeline has either been deferred or paused, as clients have become cautious with spending. Analysts, too, have warned about waning order flows this fiscal from key markets of the US and the UK. However, the company's management believes revenue growth will recover pace in the coming quarters.

Amid the uncertain global macroeconomic headwinds, the sector expects to maintain 6-8 percent revenue growth in 2025-26. That would make it the third consecutive fiscal with single-digit growth for the \$250-billion Indian sector, which once used to deliver enviable growth rates and hire record numbers of employees every year. Now, companies are going slow on expanding operations. Considering the sector's high attrition rates, the overall operating profitability should remain healthy this fiscal. That said, one of the key reasons for single-digit growth is the subdued growth in business from the banking, financial services, and insurance sector and the retail sector, which together account for about 45 percent of the Indian IT sector's revenues. Following a modest recovery in 2024-25, growth in these two market segments is likely to remain dismal at 3-5 percent this year amid slowing economic growth and cautionary discretionary spends, according to Crisil Research. It does not help that the manufacturing and healthcare segments, which together contribute about 20 percent, are also expected to register low single-digit growth.

If there is a trend, the big question is whether the single-digit growth for three years is a temporary blip driven by cyclical factors, or a sign of deeper structural issues. The good news is that despite the ongoing global turmoil and subdued discretionary spending due to tariff-related concerns in the US, analysts claim the deterioration in demand has been lower than initially anticipated. While a strengthening dollar augurs well for the sector, a sharper-than-expected growth slowdown in key markets like the US will pose significant downside risks to growth.

TRAIN CITIZENS TO REACT TO DISASTER ALARM SYSTEM

If you have recently felt anxious that the sky is falling and the ground is shaking, you would not be dismissed as delusional. The national capital territory was jolted by a 4.4-magnitude earthquake in the early hours of Thursday Up north in Himachal Pradesh, calamities triggered by rain—landslides, flash floods and cloudbursts—have left a trail of devastation in a few quick weeks. The hill state's disaster management authority has admitted the loss of at least 91 lives in such incidents between June 20 and July 10. The scenes emerging from Mandi district show the scale of damages to property and nature. Last weekend, the Guadalupe river at Comfort town in faraway Texas rose from hip-height to three stories tall in about two hours, sending water weighing as much as the Empire State building downstream every minute and killing at least 120 people. The world over, July has become the cruellest month as far as natural disasters go.

We know such extreme weather events are the new normal; but the inability of science to predict them accurately adds to the anxiety. Even with this backdrop, the Donald Trump administration is slashing the budget of the National Oceanic and Atmospheric Administration—on which not just the American, but other national weather services also depend for research and alerts—by a quarter from this October. India, meanwhile, has increased the capital outlay for its ministry of earth sciences several folds over three years to ₹79 crore in 2025-26. Yet, despite all the investments over time—including deploying some of the most powerful supercomputers to study weather patterns—we are not yet much wiser in predicting sudden extreme events.

The Texas tragedy is instructive in what not to do—investigations reveal the state repeatedly rejected pleas to fund a flood alarm system. India must be lauded for setting up the Cell Broadcast Alert System, which the department of telecom and the National Disaster Management Authority tested nationwide for efficiency last month. However, an alert system is only as efficient as the alacrity and clarity with which citizens react. Regular drills on reacting to different kinds of disasters should be mandatory at schools and offices. The only thing worse than deadly disasters would be a failure to learn from them and prepare better for the next time.

QUICK TAKE

INCLUSIVE TOY STORY

TOYMAKER Mattel's decision to introduce a Barbie with Type 1 diabetes is welcome. This line of the 11.5-inch doll comes with an attached insulin pump and is dressed in a blue, a colour associated with diabetes awareness campaigns. The American company has also introduced Barbies with hearing aids and Kens with prosthetic legs. Early awareness of health conditions can go a long way in making children more compassionate. In India, cartoons can be a more effective medium to inculcate such values, as Japan's Studio Ghibli has done for decades. For a start, films such as *Anjali*, *Barfi* and *Taare Zameen Par* have portrayed autism with sensitivity. It's time to normalise such portrayals in cartoon shows, too.

OCAM's razor, a problem-solving principle, suggests that given the choice between multiple explanations, the simpler, obvious one is to be preferred. Applying this approach, US President Donald Trump's agenda does not require complex economic or political theorising. They involve three simple objectives.

The first is power. The president wants to increase his own authority, forcing others to supplicate themselves. The reciprocal tariffs require countries to make "phenomenal offers" to buy favourable treatment. NATO chief Mark Rutte's craven flattery, including allegedly referring to Trump as "daddy," is the behaviour expected.

The second objective flows from the president's association of intelligence with wealth—the attitude summed up by the line, "If you're so smart, how come you're not rich." Many of his policies are designed to enrich the president and his funders. Examples include the first family's own investments and trading, BlackRock's pending acquisition of two Panamanian ports and the administration-aligned firms' interest in TikTok's US business. The parallel is 1990s Russia, where a small group of oligarchs became wealthy by looting state assets as the Soviet empire disintegrated.

The third involves Thomas Carlyle's "great man of history" theory. Trump sees himself as an extraordinary leader, possessing superior intellect and heroic courage, whose manifest destiny is to change and rule over America and the world. This is allied to nostalgia and a worldview firmly rooted in the 1980s.

A reordering of the international trading and monetary system is central to this strategy. Prior to joining the administration as chair of the Council of Economic Advisers, Stephen Miran published a proposal to lower the dollar's value and reduce current account and fiscal deficits. Formerly known as the "Mar-Lago Accord"—a nod to the Plaza and Louvre accords of the 1980s—it includes a series of steps, including tariffs and currency adjustments to force economic concessions favourable to the US from other nations. One controversial component is a restructuring of US public debt entailing a forced exchange of some US treasuries for long-dated (100-year or perpetual), low- or zero-interest securities to lengthen maturities and provide safe funding. Alternatively, foreign holders of US government bonds can place them in escrow or pay an "user fee". Controls over capital movements into and out of the US are possible.

Another element is extracting tributes and territories. The proposed minerals and energy agreement with Ukraine is a brazen

Trump wants to extract tributes from the rest of the world. But his policies could end up diminishing America's prominence, making the respect he seeks harder to come by

A SIMPLE WAY TO LOOK AT TRUMP'S COMPLEX AGENDA

SATYAJIT DAS

Former banker and author of
The Age of Stagnation



SUDARNO

attempt to extract payment for "services provided". A similar deal with the Congo has also been negotiated. Allies can increase defence spending, benefiting US armament manufacturers who dominate supply or pay for American protection. A demand for stakes in semiconductor makers in return for support for Taiwan is not fanciful.

Territorial claims (over Canada, Greenland, the Panama Canal and the Gaza Riviera) alongside threats or actual military actions, such as those in Iran, in the name of national and international security seek to expand the US dominion. After all, Alexander became great by conquering much of the then known world. President Trump, who identifies with the godfathers in Mafia movies, misunderstands the opposition from affected parties and geo-political rivals.

Greek letters, equations and citations

of misunderstood academic articles notwithstanding, the tariff plan looks like something an AI engine would produce. The latest threat to some trading partners is for tariffs of 25-40 percent unless their companies choose to manufacture in the US. Any reciprocal tariffs on American products or membership of the "anti-American" BRICS, he warned, would trigger additional duties. The '90 trade deals in 90 days' has not eventuated.

A trade war is likely as the US has significant surpluses on the trade of services such as technology, damaging tariffs or outright bans on US services exports would hurt successful US industries. The US will be unable, in the short run, to substitute certain essential items resulting in higher prices or shortages. The assumption that overseas firms will absorb the tariffs is incorrect. In 2016, prices of goods imported into the US did not

rise because of the stronger dollar but the administration has stated it now wants a weaker currency. President Trump has threatened to punish, presumably through price controls, US car makers if they pass on the increased cost of inputs transferred with the cost to businesses from consumers.

Some imports may be replaced with local production, but it would take years, increase prices and reduce choices. Reshoring high-end manufacturing will struggle due to the lack of requisite skills given the resistance to immigration. It will not create the expected jobs as these industries are typically highly automated. Tariff revenues will end up being redirected as subsidies to many affected industries. Ultimately, national income depends on importing what you cannot produce or cannot produce at low costs. The tariffs will benefit US's trading partners. Barriers to exports into the US will mean producers are forced to cut prices as they divert stock to other markets as the EU has warned. Other economies will reallocate capital to manufacturing rather than exports effectively bypassing America as the cost of accessing what President Trump calls "extraordinary economy of the United States—the number one market in the world" becomes prohibitive. Global exports to America of \$3.2 trillion are not irreparable.

The US administration seems not to grasp that the US dollar's dominance, rather than manufacturing, is critical to America's position. Restructuring US debt as suggested would constitute a technical default on its obligations. MAGA would become "Making America Greece or Argentina" (both defaulters on their foreign debt). This would accelerate capital flight making it more difficult to finance America's budget and trade deficit. It risks permanent damage to US capital markets. Up to 70 percent of all funds that flow through the US market are from overseas investors recycled through American banks and asset managers because of low domestic savings. As much of this is re-routed over time, New York's prominence as a financial centre will diminish. Attempts to extract tribute and expand territories challenge other nations' sovereignty. Few will pay for uncertain US protection or surrender to it.

The administration's path, which ignores economics and history, is indeterminate. The planning and execution have been haphazard. But as Winston Churchill, to whom Trump has compared himself, observed: "The statesman who yields to war fever must realise that once the signal is given, he is no longer the master of policy but the slave of unforeseeable and uncontrollable events."

(Views are personal)

A BITTER PILL TO SWALLOW

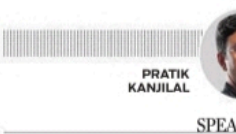
LATE last month, a paper in *The Lancet Global* by a team of researchers led by Maximilian J. Wilfinger of the University of Notre Dame, US, reported that several chemotherapy drugs administered in sub-Saharan Africa had failed quality tests. About 20 percent of the drugs were either ineffective or had dangerous side effects. The products of 17 manufacturers failed tests. All but one are Indian firms.

The Bureau of Investigative Journalism enlarged the story. Like earlier episodes in which paediatric syrups exported from India killed children overseas, this episode reminds us that merely having a volume lead in generics does not guarantee that India can be the "world's pharmacy", as the government likes to advertise it.

These were the big picture stories, but the incident also has a personal, human angle. Personal stories are of course anecdotal, but that does not automatically devalue them, because we are not doing statistics here. So, to get personal, a couple of years ago, someone close to me was diagnosed with an aggressive paediatric cancer. We mostly hear of research successes, and the general impression is that cancers are becoming curable, or at least manageable. Indeed, they are, but for many cancers, treatment has not improved in 30 years. For perspective, it means that the treatment of the cancer we're talking about has not changed since V P Singh was prime minister.

A paediatric oncologist in Delhi told me a fundamental truth: "Cancer doesn't affect only the patient, but the whole family." That's especially true with difficult variants of the disease. The patient and family are suddenly cut off from normal life. It is as if an invisible wall stands between them and the majority who, thank heavens, have no experience of the disease. What divides these worlds is the idea that life is uncertain. Families with cancer know this; the rest of the world has gratefully forgotten it. Our legal wills still begin with the words, "Our legal will is uncertain," but we are fortunate. We take a course of pills to brush off diseases which were feared once upon two generations ago, like pleurisy and typhoid. After penicillin, we are no longer wired to think of untimely death as an everyday reality. Most of us feel it is unnatural to live with uncertainty.

But cancer families know only uncertainty, and questions about some cancer drugs from India amplify it. Indeed, they may have seen the effects reported in the *Lancet* paper in their own patients. One



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SPEAKEASY

round of chemo does not produce the expected side effects, while another round is bio-horror. Apparently, this is because the drugs delivered contain too little or too much of the active ingredient. Are manufacturers to blame? Some of the companies whose products failed have denied responsibility and questioned the patency of supply chains instead.

A friend in a US company which makes systems for tracking drugs through supply chains says Indian manufacturers are interested in stringent assurances only for export to first world markets. For the rest of the world, and for the domestic market, it's not a priority.



A study has revealed that cancer drugs exported to sub-Saharan Africa by several Indian manufacturers failed quality tests. This follows the scandal of Indian syrups that led to the death of children in western Africa and central Asia. Such cases puncture claims to be the 'world's pharmacy'

Now, another personal anecdote—a friend in a small town in West Bengal, who has struggled with cancer for decades, has just crowdsourced for his treatment. The drug he needs costs about ₹20 lakh to import from the US, but ₹4 lakh from Germany. If it was manufactured in India, it would have cost a fraction of the German rate. Variations in drug prices across borders are a scandalous uncertainty.

That is why poorer countries, like the markets examined in the *Lancet* report,

source drugs from India. But if the price for the rebate is quality, then the poor of the world are paying it disproportionately. Families have to marshal all their resources to finance cancer treatment. Middle class families sometimes have to sell assets and even their homes. If they later find that the medication was deficient, they cannot afford to change course or start over again. The sheer human cost, at a time when the incidence of cancer is steadily increasing, calls for more oversight, whether quality deficits owe to production facilities or supply chains.

There is also a mercantile cost. India wants to become a significant provider of the world's medications, particularly generics. But the health sector is built on reputation, and India's prospects are damaged by chronic problems like counterfeit drugs and poor quality control, and a shortage of skilled professionals. The skills shortage is the result of failing to invest in education like China has done after Mao's time.

The effect of the skill shortage will be sharpened as pharma pivots to bi-tech, and frontline disciplines like personalised medicine and AI-powered drug discovery become industry standards. While the government and the industry have been reforming for regulatory compliance and quality assurance, significant gaps remain and commercial pressures have eroded public trust in the health sector. But affordability doesn't have to be at the expense of quality. Decades ago, Cipla did provide the quality HIV generics to African nations at \$1 a day, as its chairman Yusuf Hamied had promised.

Indian pharma had barely recovered from the scandal of supplying toxic syrups to children in the Gambia, Cameroon and Uzbekistan, which had killed over 100, and now cancer drugs are under suspicion. Lack of international trust in product quality would hamper India's pharma sector, which is a notable exception to the failure of the Make in India project. And apart from the mercantile cost, there is the human cost to millions of cancer patients and their families the world over. (Views are personal)

(Tweets @pratik_k)

MAILBAG

WRITE TO: letters@newindianexpress.com

Farmers' cooperatives

Re: *Bitter harvest: Support farmers with water management* (Jul 1). Agriculture has become a potential death trap for farmers due to multiple issues. Politicians seek votes with dollops, but exhibit apathy once they occupy the coveted chairs. The farmers should start cooperative societies to tackle common issues.

Rajaro Kumar, Bengaluru

Inner well-being

Re: *Boost mental learning to buck tech skill shortage* (Jul 1). Maths and technology should not be seen merely as a means to turn students into market-ready products. When the inner well-being of students and parents is nurtured, outward success will naturally follow.

Tejswini Nayak, Kurnool

Political stand

Re: *Take pride in the Op, brace for the worst* (Jul 1). There is no comparison between a country with an elected government and the other facing frequent military coups. The writer deserves applause for his stand against terrorism irrespective of party positions.

P. Rama, Thanjavur

Demographic strength

Re: *Neither too many, nor too few* (Jul 1). Demographic growth is a multi-dimensional study. With the decadal census already delayed by five years, the results remain awaited to study its multifarious aspects. Equitable distribution and proper management of resources are required to channelise the available demographic strength.

Sachidananda Satpathy, Sambalpur

Roll revision

Re: *No stay on Bihar roll revision* (Jul 1). The Supreme Court has refused to stay the Election Commission's decision, which has been indiscriminately targeted by some opposition leaders. Parties and leaders must reassess what truly is the problem—the roll revision or their criticism.

Hullasa Behera, Bhubaneswar

Committed governance

Re: *Internal survey reveals resentment over roll revision* (Jul 1). The stretch covered by the election commission is really praiseworthy. If only a similar commitment had been undertaken for making the country environment friendlier, loosening the mire of unbridled industrialisation and mining, and making our education system inclusive.

Shikha Gupta, Jaipur