DECCAN Chronicle
15 JULY 2025

EC should act sensitively as it cleans up poll rolls

The reports of the claims of booth level officers in Bihar that they have found people from the neighbouring countries of Bangladesh, Myanmar and Nepal have procured documents to prove their nationality here as per the demands of the special intensive revision (SIR) of the voters' list and Election Commission of India (ECI) directing chief electoral officers (CEOs) of all states to start preparations for holding SIRs point to the high level of diligence with which the authorities need to approach the issue of the purification of the electoral roll.

As has been recorded in the Constitution and repeatedly asserted by the ECI, the electoral roll is a document of the bona fide citizens of this country, and only those who are citizens of the country need to be on it. Since the holding of a fair and free election based on a proper electoral roll is part of the foundations of electoral democracy, the ECI should do all in its powers to ensure that every component of the process is error-free and foolproof.

However, what defies logic has been pointed out by the Supreme Court: One, even an educated urban dweller will find it difficult to present the documents the EC has demanded to prove one's identity in such a short notice, and two, it is the job of the home ministry, and not the Election Commission, to verify one's citizenship. Read them together, and the directive of the EC to the state CEOs, would point to an unwarranted haste on the part of the poll panel to go about the SIR exercise.

While it remains a legitimate target of the EC to keep the electoral roll a sanctified document, it should think of doing the job in a citizen-friendly fashion instead of handing over the burden of proof to the people who are already on their rolls. Is it not possible for the commission to scrutinise the rolls and find out the names, if any, which should not be there, instead of asking all those who are there around to prove their bona fides? Is it not possible to have a scrutiny at the time of enrollment? Why should the Election Commission take upon its shoulders the scrutiny of the citizenship of the people on its rolls?

The finding in Bihar that 'foreigners' have procured documents will run the entire exercise into more trouble, and question its very purpose. It also points to the callous manner in which government agencies go about the data of citizens they procure.

The attorney-general was forced to admit in the Supreme Court about unacceptable data protection mechanisms of the Unique Identification Authority of India which issues Aadhaar numbers.

If the government wants to end this free-for-all, it must work with all the stakeholders taking into account the reality of India where a large section of people will have no document to prove their very existence, let alone their citizenship. It must be a patient, people-friendly inclusive exercise. A summary revision in lighting speed has all the chances of disenfranchising people.

Even if it affects a single citizen, it will undermine the credibility of the entire roll. Be slow, be steady and be inclusive. Deadlines are not more sacrosanct than people's right to exist.

Sinner, Iga light up Wimbledon

Jannik Sinner's redemption came at Wimbledon where he wasn't supposed to win as Carlos Alcaraz, the two-time reigning champion on grass in London, had beaten him in five consecutive matches across all surfaces, including in a thrilling French Open final that was a 5.5-hour classic contest for the ages in which Sinner had held three championship points.

The first ever Italian champion at Wimbledon, Sinner displayed the mental resilience to come back from opening set loss Sunday that seemed to come against the run of play and went on to outplay his rival, who is a year younger than him, to add to the three slams he had won previously.

While the matchup merely confirms that the two players who make for a tennis duopoly hunting down top slam titles are a class apart from the others, including the 24 grand slam winning all-time great Novak Djokovic who was relegated to a barren slam run that stretches back to the US Open of 2022. Sinner and Alcaraz are the present and future of tennis, for a long time to come.

Their final was a high-quality contest with little margin for error as they traded strokes at great intensity. What may have separated them finally was Sinner's greater steadiness with both serves while Alcaraz was speedy with his service but blemished. The flair behind some of the shot making was, however. filled with phenomenal flair.

When it came to a question of nerves, Sinner seemed to hold his composure better, despite the crowd chanting 'Carlos, Carlos' as he aimed to serve for the match and title. Sinner displayed how much he has worked on his game to be able to play the drop shot with the delicate touch that makes a great difference on grass courts.

And yet it was essentially a grand baseline battle in which Sinner's resolve to win and take an albatross off his back in beating Alcaraz that separated the pair.

Remarkably, Iga Swiatek of Poland converted her first appearance in a Wimbledon final spectacularly into a sixth slam triumph that left her opponent Amanda Anisimova in tears. Her "Double Bagel" annihilation of the American hadn't happened since 1911. She may have foreseen her triumph as the Pole had said after an early round win that the tennis balls were "listening" to her. She is the only active player today to have won slams on grass, clay and hard courts.

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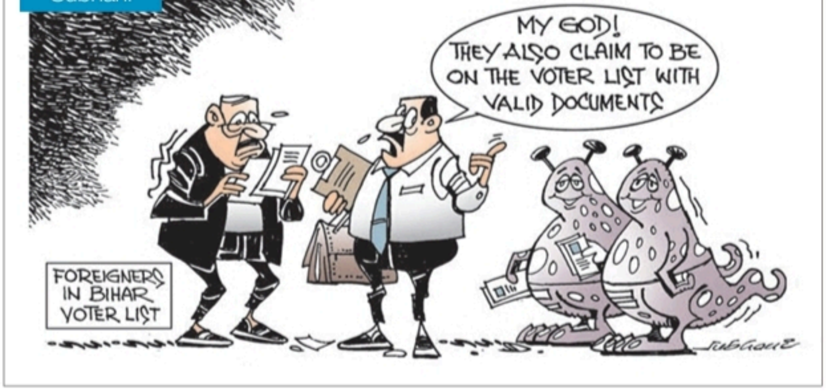
Subhani



Walking the tightrope on peace in Manipur

Wasbir Hussain

Another urgent issue that the MHA is interested in finding a solution to is the rehabilitation of 57,000 internally displaced people (IDP), who have been living in makeshift relief camps for more than two years now with immense hardships.

Earlier this month, a spokesman of a leading Kuki civil society group said in a television debate that his community, that is, the Kukis, would never talk to Meiteis and the only time they could consider talking to them would be during the signing of an agreement that would grant the Kukis a "separate administration", obviously outside the jurisdiction of the state of Manipur.

One doesn't know if this is the general mood among all Kuki-Zo civil society groups, but if this is so, then the efforts of the Government of India's home ministry to reduce the trust deficit between the two warring groups, the Kukis and the Meiteis in Manipur, may not yield results. The Union home ministry has so far held four rounds of trust-building talks with prominent civil society groups representing the Meiteis and the Kukis, both in the state as well as in New Delhi, since President's Rule was imposed in February this year. However, these talks were held separately with the leaders of the two communities with the hope that at some point, they would sit together and discuss the peace roadmap.

What the MHA is aiming at is to first deal with issues like free movement of people from both sides into the territory of the other side because ever since the ethnic violence began on May 3, 2023, the Kukis have not ventured into the Imphal Valley, comprising six districts, while the Meiteis have not visited the Kuki-dominated hill districts like Churachandpur and others. Even the 10 Kuki-Zo MLAs have not visited the Imphal Valley since May 2023 and have missed all the state Assembly sessions held in the capital Imphal during this period.

After the MHA-initiated talks, leading Meitei civil society groups like the Coordination Committee on Manipur Integrity (COCOMI) have stated publicly that they have no objection to people belonging to the Kuki-Zo community coming to the Imphal Valley for any sort of work. But, leaders of groups like the Kuki Inpi, an influential Kuki civil society organisation, have been saying in the media that they are okay with the free movement of goods and essential commodities between the Imphal Valley and the hill districts, but were not open to the free movement of people as yet. Now, this is one of the sticky points, that is, ensuring free movement of people across the state, that the government at the Centre and the state have to resolve.

Another urgent issue that the MHA is interested in finding a solution to is the rehabilitation of 57,000 internally displaced people (IDP), who have been living in makeshift relief camps for more than two years now with immense hardships. Here, too, there seems to be a difference in approach by the Meitei and Kuki IDPs. While some Meitei IDPs who have been uprooted from their homes in Kuki-dominated areas want to return to their homes in Churachandpur, Moreh and other places, the Kukis displaced from their homes in Imphal and other Meitei-dominated areas are reluctant to settle again in their original homes in the Imphal Valley, accusing the Meiteis of being the "perpetrators".

Now, in the middle of all this, Manipur governor Ajay Kumar Bhalla has said that all relief camps, numbering around 350, housing the IDPs will be shut by December this year. The rehabilitation policy of the government is not clear but what is known is that the authorities have built around 1,000 pre-fabricated houses to accommodate the IDPs.

The question arises whether the Meitei IDPs will be housed in the Meitei-dominated Imphal Valley area and the Kuki-Zo IDPs will be housed in the Kuki-dominated hill districts. If this is so, how can one expect the two warring sides to ever patch up and regain each others' trust? Can the IDPs never return to what they called home for decades? Will the Meiteis and Kukis be divided and separated for ever? These are questions to which there are hardly any answers.

If one goes back to the genesis of the ethnic clash, it appears that the main trigger was an attempt or demand to grant Scheduled Tribe status to the Meiteis. The Kukis opposed it, saying the Meiteis were an "advanced community" and as such granting them ST status will deprive the Kuki-Zo community of benefits like reservation in jobs and educational institutions. The Kuki-Zo groups were already seeking maximum autonomy for the hill areas that they inhabit. But after the ethnic violence, that has killed more than 250 people on both sides and displaced 57,000 others, the Kuki-Zo groups have upscaled their demand from the vague term of "autonomy" to that of a "separate administration". The Kuki-Zos are either hoping to achieve a Union territory for the community, if not a separate state.

The stand of the Meiteis is well known: that there will be no dismemberment of Manipur.

On its part, the MHA wants to separate the two challenges in Manipur today -- that of restoring normality in the state, bridge the trust deficit and resolve issues like that of free movement across the state and rehabilitation of IDPs and the political demands of the two communities. The MHA feels that dealing with the political demands will require a "structured dialogue" with both groups separately, and even jointly. And that such a dialogue cannot be started without a semblance of peace in the state and the willingness of the two communities to sit together and talk. This, however, is proving to be an uphill task as things stand on the ground.

Amid these developments, there is a clamour for the restoration of a "popular government" in Manipur. That can be done as while clamping President's Rule, the Centre kept the Assembly in suspended animation and not dissolved. The BJP and its allies still command the maximum number of MLAs in the 60-member House, but who will be the new leader? After all, the former CM, N. Biren Singh, could not succeed in dealing with the situation or ending the ethnic violence. The masses and some civil society groups on their part are "unhappy" with President's Rule and want restoration of, what they call, a "popular government" in the state.

But the big question is: without the participation of the Kuki-Zo elected representatives in any new Manipur government, the stalemate cannot be broken. And organisations like the Kuki Inpi issued a diktat to the ten Kuki-Zo MLAs not to participate in any government formation process in Manipur. On the whole, the deadlock continues in almost all major fronts in the state where peace is elusive, to say the least.

Wasbir Hussain, author and political commentator, is editor-in-chief of Northeast Live, *Northeast India's only satellite English and Hindi news channel. The views expressed here are personal.*

LETTERS

STOP CHILD ABUSE

It is horrifying to note that a caretaker, her father and a driver have been arrested under the POSCO act on charges of sexual assault that has been going on undetected for years in a government-recognised children's home in Chengalpattu district. The periodical inspections carried out by the District Child Welfare committee at the home in question seem to be a mere formality lacking sincerity. Are child psychologists included in the committee that inspects such homes? The government owes a reply.

S. Vaithianathan
Madurai

PLAY CRICKET GENTLY

I read the article ' Cricket is live theatre but please don't make it a street brawl ' (July 14) with interest. Winning or losing is part of any game. But it is imperative that players exhibit exemplary behaviour both on and off the field. Some players' confrontations on the field in the third Test between India and England at Lord's have put the gentleman's game in poor light. If players have any issues regarding the ball used or violation of any rules or whatever, they can get them solved in a polite way. They should not be oblivious of the fact that they are ambassadors of their nation.

S.Ramakrishnasayee
Chennai

CRUELTY TO CATTLE

Pained to see continuing cruelty to cattle despite the laws on prevention to cruelty to animals acts 1980 reiterated by high court rulings in its favour and framed guidelines. We can only express our regret, but courts should take up suo motto and offer justice to voiceless cattle like our ancient Chola king delivered justice to the bell rung by the victim's mother.

Dr. Soundararajan
Chennai

Mail your letters to
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Aakar Patel

Will Zohran's NY triumph offer US Democrats a way to battle Trump?

One of the most remarkable democratic developments of recent times came from New York City this month. A 33-year-old man of Indian origin won the Democratic Party nomination to run for the mayor of the city. The nomination is a sort of semi-final match, but because New York is a very Democratic Party-leaning city, he is the frontrunner and the likely winner of the election, which is in November this year.

Zohran Mamdani is from a Gujarati Muslim family, and his father is a university academic who wrote a famous text after September 11, 2001, titled "Good Muslim Bad Muslim". Zohran's mother is Mira Nair, the director of such movies as *Monsoon Wedding* and *Salaam Bombay!* But his background is not the important part of Zohran's story: it is the way in which he competed against and defeated a stalwart of his party, Andrew Cuomo, who was governor of New York state.

The development is important because New York's mayor has serious powers. He oversees a budget of over $100 billion which is more than that of most countries. He appoints judges, the police commissioner, and heads of more than 40 city agencies and members of boards and commissions.

The reason figures like Rudy Giuliani are famous is that they were in this position.

Zohran's platform was socialism and he refers to himself as a democratic socialist. This, as many readers will know, is a term that is almost derogatory in the United States because of its history against Communism. But Zohran owns the term socialist proudly and says he is there to represent the working class, blue collar and immigrant New Yorkers and not the wealthy. He said he would as mayor freeze rent on 20 lakh homes; he would make city buses free; he would make child care free (a sort of anganwadi programme); and he would experiment with state-run grocery shops, starting with one in each of New York's five boroughs. This would be like our ration shops, aimed at subsidising food. He says he will pay for this by marginally raising income taxes, but only on those New Yorkers who have an income of more than $1 million (over Rs 8 crores) per year.

The second important thing was the quality of Zohran's campaign, which was conducted mostly on social media outlets TikTok and Instagram. Short videos of Zohran, who is a most attractive individual, himself going around the city and talking to New Yorkers about their concerns. These videos are also available on YouTube and they are worth watching for what a low-cost, effective and fresh campaign looks like.

Zohran speaks excellent Hindi, Spanish and Bengali in some of these videos to directly address those from South Asian and Latino backgrounds. He has no problem being comfortable with his identity as a South Asian, compared to other political figures in the United States who are of Indian origin.

The campaign has a very Bollywood touch to it, including the typefaces used and the editing of the videos.

The third striking thing about Zohran is that he speaks out for the rights of Palestinians and criticises the actions of the Israeli State. This is a most unusual position, because it opens him up to attack from what scholars like John Mearsheimer have called the Israel lobby. Zohran's courage shows from his refusal to back down or soften his stand even when running for an election with such high stakes. This is not how politicians behave. The US is the only nation whose democratic candidates are expected to show enthusiastic loyalty to another country.

The fact that he achieved a thumping victory despite having the media, including the New York Times, attack him viciously and unfairly shows that this courage was respected and admired and rewarded by New York's residents.

His own Democratic Party offered him little support and few endorsements even after he won the nomination. There is no Bill Clinton, Joe Biden or Barack Obama today by his side, because of their fear of association with Zohran and what he says and does. In the past, Democrats who have promoted socialist policies, such as Bernie Sanders, have been seen as likeable but marginal figures. Zohran is different.

His victory means that his party will have to learn from him, because after the rise of Donald Trump, the Democrats have been in disarray. Currently, the Republicans control all three branches of the federal government, the White House, the House of Representatives and the Senate. Democrats have had no real answer to the Trump phenomenon and Zohran, with his emphatic and clear policies aimed at working-class Americans offers them a national path for a return.

It is a fact, among other things, that the position of many Americans on the issue of Palestine has shifted because of the ongoing genocide in Gaza. It is Zohran who represents this majority, which is voiceless in his party.

If he is able to win the general election later this year and is then able to deliver on the substance of his policies over the short term, his party will come to him. The United States goes into its crucial mid-term elections late next year and the Democrats now have a desi hero to teach them how to contest and on which issues.

The writer is the chair of Amnesty International India. Twitter: @aakar_patel

It is the obvious which is so difficult to see most of the time. People say, 'It's as plain as the nose on your face.' But how much of the nose can you see unless someone holds up a mirror?

Isaac Asimov

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

— Ramnath Goenka

RELEASE FULL TRANSCRIPT OF AI FLIGHT 171'S AUDIO RECORDING IMMEDIATELY

INDIA'S Aircraft Accident Investigation Bureau (AAIB) burnt midnight oil to release a 15-page preliminary report on the Air India flight 171 crash that killed 260 people in Ahmedabad on June 12. The rush was for sticking to the International Civil Aviation Organization's deadline of submitting an initial probe report within 30 days. That the plane decelerated seconds after takeoff is well known. The report reveals the first engine's fuel switch was transitioned from run to cut-off three seconds after being airborne; and the other one a second later. The retrieved cockpit voice recorder's audio shows one pilot asking the other why he shut them off, to which the other says he did not. They then scrambled to fire up both engines; the first revved up while the other struggled—but it was all too late.

The report led to a fierce pushback from the Indian pilots' association, which suspected calumny while sections of Western media had started speculating on confusion in the cockpit, inferring pilot error. The AAIB, too, appeared to indicate it without explicitly saying so, as its report was open-ended. It begged the question: why did it share just two paraphrased sentences the pilots exchanged and not the full conversation?

Here are some other questions. First officer Clive Kunder, 32, was flying the aircraft, while pilot-in-command Sumeet Sabharwal, 56, was monitoring it. Which of them asked the other why he shut the fuel switches? The first switch was off at 1.38.42 pm. Switching it on ought to have been a reflex action. Why did it take the pilots 10 seconds to do so? Why was fuel to the second engine switched on four seconds after the first and not simultaneously? While the first engine developed thrust after fuel was restored, the second struggled—why? The US's Federal Aviation Administration had flagged potential disengagements of Boeing's fuel switch locking feature way back in 2018. When was this craft's fuel switches last serviced? The AAIB must put out the full transcript of the fateful flight's recordings to dispel suspicion that the preliminary probe report was meant to frame the pilots, who tragically are incapable of defending themselves. Though the final report may take a year, full transparency even at this stage can give some closure to the families of the victims.

SINNER, SWIATEK BANISH DEMONS TO WIN ON GRASS

THE hallowed centre-court of the All England Club, the stage for many historic moments, saw two first-time champions on the weekend. One was the indomitable Iga Swiatek and the other Jannik Sinner, who was at his imperial best for the entire two weeks at Wimbledon. For most mortals, recuperating from the loss at Roland Garros would have taken time. Facing the same opponent—Carlos Alcaraz, who overturned three match-points and a two-set deficit on way to the French Open title—in the final was always going to be tricky. The odds were in favour of Alcaraz, the defending champion. But Sinner showed no signs of nerve even after losing the first set. This spirit is what separates champions from those merely good.

It's not the first time Sinner had to rely on his mental fortitude to erase memories of anguish. He tested positive for a banned substance and had to serve a suspension—not easy for an elite player. Every now and then, there would be someone questioning the integrity of such a player. Yet, he clawed back. He came back to win the Australian Open as if nothing had happened. He lost the French Open, but came back to beat the same player on the grass court, where he had never won before. The rivalry between him and Alcaraz has been blossoming. If the immediate past of men's tennis was defined by the Big Three, the next era could be the battle between these two.

If Sinner glided on grass, Swiatek's win was cathartic. She beat Amanda Anisimova 6-0, 6-0 in one of the most one-sided finals in the tournament's history. She, too, had served a suspension for testing positive for a banned substance. There were times when she was losing cool on the court. The results were not going in her favour. That this was her first Grand Slam triumph after the French Open she won last year shows her struggle. The Wimbledon title will give her the belief she needed to erase the demons in her mind. For an athlete used to winning, seeing rivals usurp their throne can be a mental challenge. World No 1 Aryna Sabalenka will be back to defend her US Open title; but the former world No 1 will be ready to give her a chase.

QUICK TAKE

LESSON FROM STRAWBERRY FIELDS

IT'S not just hi-tech industries that are feeling the desiccating heat of Donald Trump's hardline immigration policies. Reports show the American strawberry industry is reeling, too. California produces 90 percent of the US's strawberry output, worth about $3 billion. And this industry remains heavily reliant on labourers, especially immigrants from Mexico. Eric Schlosser's classic 1995 essay *In the Strawberry Fields*, which examined their working conditions, explained why the 'natives' cannot be cajoled to do such backbreaking work. And now the stream of those workers has dried up. This and similar anti-immigrant policies in Europe show that while populist leaders promise work for locals, the natives themselves would rather depend on 'aliens'.

The four-year-old Taliban govt has belied fears that it would collude with Islamabad to foment trouble in India. It's time for New Delhi to revitalise its age-old ties with Kabul

SEVEN STEPS TO REBUILD BRIDGE TO KABUL

SUDHEENDRA KULKARNI

Gandhian peace activist and aide to former Prime Minister Atal Bihari Vajpayee

SOURAV ROY

INDIA has always enjoyed immense goodwill in Afghanistan, our civilisational neighbour. This is true even now, when Kabul has again come under Taliban rule. Sadly, many Indians, influenced by the western media narrative, view the Taliban as jihadi terrorists. When a defeated America withdrew its troops from Afghanistan in August 2021, paving the way for a quick takeover of power by the Taliban, they saw it as a catastrophe for India. Having convinced themselves that the Taliban were a mere puppet created and controlled by Pakistan, they anticipated a spurt in joint Pakistan-Taliban terror offensives against India.

The four-year-old Taliban rule in Kabul has belied these fears. If anything, relations between Kabul and Islamabad have been tense. When I met Suhail Shaheen, a senior Taliban leader who headed the Doha political office of the Islamic Emirate of Afghanistan, in February 2024, he said, "India should shed the suspicion that the Taliban is 'close to Pakistan' and 'against India'. Our government is firmly committed to the principle that we shall not allow anybody to use our soil against India or any other country." I have met several Taliban officials since then, and all of them have expressed the same view.

There is a belated realisation in New Delhi that the current government in Kabul should not be treated as an adversary and that it can even be an important ally. This has resulted in a flurry of diplomatic contacts over the past year. When External Affairs Minister S Jaishankar phoned his Afghan counterpart Amir Khan Muttaqi on May 15, and "deeply appreciated his condemnation of the Pahalgam terrorist attack," it marked the highest-level communication between Delhi and Kabul. Yet, New Delhi is tardy in elevating the ties with Kabul. On July 3, Russia became the first country to formally recognise the Islamic Emirate of Afghanistan. China, the UAE and Uzbekistan have designated ambassadors to Kabul. Beijing hosted a trilateral meeting of the foreign ministers of China, Afghanistan and Pakistan in May; the China-Pakistan Economic Corridor will now be extended to Afghanistan. India, too, should establish normal ambassadorial relations with Afghanistan without any delay.

Afghanistan is changing, and will change even more. After suffering deaths and destruction on an unimaginable scale in four decades of war—first by the Soviet Union and later by the USA—it is now focused on peace and national reconstruction. Recognising that the country's diaspora is a precious resource, the Taliban want to create conditions for the return of over one million highly-talented Afghan professionals who left the country due to the disturbed conditions of the past. Some Taliban leaders are themselves demanding an end to the ban on female education. Against this backdrop, India must hurry to expand all-round engagement with this strategically located member of our South Asian family. Here are eight ideas on how India can help in Afghanistan's national rebirth.

'Saudi Arabia of lithium': Prime Minister Narendra Modi should ask both our state-run and private companies to participate in Afghanistan's infrastructure development and rapid industrialisation. Alleviating its acute power shortage should be a priority. Afghanistan, known as the 'Saudi Arabia of lithium', is ready to invite Indian businesses to harness its fabulous mineral wealth of copper and rare earths worth several trillion dollars. This should be done in non-exploitative and win-win ways, in partnership with Afghan entrepreneurs.

Livelihoods: India should share its expertise in revitalising Afghanistan's agriculture, horticulture and small industries. These have the highest potential to create local livelihoods. The Taliban government has taken stern measures to stop poppy cultivation in a crackdown on the opium and heroin trade. Although the whole world has benefited from this, it has also robbed many farmers of their previous sources of income. They need help.

Education & health: India should remove all visa restrictions on Afghan people who want to travel to our cities for medical treatment, education, trade and business. For example, there were as many 11,000 Afghan students in India (35 percent of them women) until a decade ago. Today, the number is negligible. Due to lack of medical facilities, Afghan patients spend over $1 billion on treatment abroad. The Taliban government is ready to incentivise Indian companies to establish hospitals and pharmaceutical factories. It also seeks Indian help in teacher-training at its universities.

'Divyang' seva: Four decades of war has left over 1.5 million disabled people in Afghanistan. India's 'Jaipur Foot' organisation, founded by D R Mehta, a respected former Sebi chairman, has earned widespread reputation in Afghanistan by providing artificial limbs to thousands of people. India's corporate-funded philanthropic bodies should help such organisations in offering *'divyang' seva* to Afghans.

Cricket: Cooperation in sports, cricket in particular, has enormous potential to bring Indians and Afghans closer. Rashid Khan, Azmatullah Omarzai and other IPL players have become household names among cricket-lovers in India. Afghans are grateful to the BCCI and IPL for their support in developing the country's cricket. Such cooperation should be extended by grooming promising young Afghans in football, wrestling and other sports. How about the Indian government asking the cash-rich BCCI to build a world-class cricket stadium in Kabul?

Trade: After the recent India-Pakistan military clash, trade between India and Afghanistan has been badly hit with the closure of the Attari-Wagah land route. Efforts should be made to re-open this route. Simultaneously, there is a need to accelerate development of the India-Iran-Afghanistan route through Chabahar port.

People's diplomacy: The Taliban diplomats I have met attach great importance to enhancing people-to-people interactions to promote mutual trust. One of them said: "There are hardly any meetings between high-ranking Indian and Afghan politicians. They should meet frequently. There should also be regular exchanges between scholars, journalists, strategic experts, socio-cultural leaders and captains of business and industry."

SAARC: Regional cooperation, including through SAARC's revitalisation, is of paramount importance in Afghanistan's national reconstruction. It is the responsibility of India, China and all other regional countries (including Pakistan) to assist Afghanistan in all possible ways. For such efforts to succeed, regional countries must desist from bringing their competition and rivalries onto Afghan soil. Like Vietnam, Afghanistan has wisely decided to build friendly ties with all countries in the world. This decision should be respected.

Surely, the time is ripe to infuse new vitality into an age-old relationship that is critical for the future of both India and Afghanistan.

(Views are personal)

RISKS & REALITIES OF KILLER ROBOTS

ADITYA SINHA

Public policy professional

IN his sci-fi novel, *Runaround*, Isaac Asimov introduced the three laws of robotics to explore the moral boundaries of machine intelligence. His robots were programmed to preserve human life, obey ethical constraints, and act only within a tightly defined moral architecture. These laws forced readers to grapple with the limits of delegation and the necessity of conscience in decision-making. This insight is especially relevant today, as warfare increasingly incorporates unmanned systems.

In recent conflicts—India's Operation Sindoor, Azerbaijan's use of Turkish drones against Armenian forces, and Ukraine's deep drone strikes into Russian territory—all offensive systems remained human-operated. Humans directed target selection, authorisation and engagement. But now, as the global defence landscape shifts toward lethal autonomous weapon systems (LAWS), Asimov's warning grows more relevant. Unlike the author's fictional robot Speedy, these systems will not hesitate when ethical ambiguities arise. They will not wait for human correction. They will act without the possibility of a moral pause.

LAWS are weapons that can select, track, and engage targets without real-time human control. LAWS rely on AI, sensor fusion, and machine learning algorithms to make independent targeting decisions. This autonomy dramatically accelerates response time and expands operational reach, but at significant ethical and legal cost. The development of LAWS is already underway in multiple countries. The US, China, Russia, Israel and South Korea have invested heavily in autonomous platforms ranging from loitering munitions to swarming drones and autonomous ground systems. The US military has demonstrated autonomous swarms in exercises like Project Convergence; China is integrating AI into hypersonic systems and naval platforms; and Russia has tested autonomous tanks like Uran-9. Although fully autonomous systems capable of making unsupervised kill decisions are not yet officially deployed, the technological threshold is narrowing.

These systems come with six kinds of risk. First, LAWS rely on AI for target recognition; however, these models are vulnerable to adversarial attacks, such as infrared decoys or altered clothing patterns, which can lead to civilian misidentification and thereby violate the principle of distinction under international humanitarian law.

Second, as reaction times shrink to milliseconds, human oversight becomes impractical. Decisions will be driven by opaque AI models like deep neural networks, undermining transparency and making post-strike accountability nearly impossible.

Third, when deployed in swarms or decentralised formations, LAWS may exhibit emergent behaviour; actions not explicitly programmed, leading to unpredictable escalation. In high-stakes conflicts, such as those involving missile defence or critical infrastructure, unintended escalation could have strategic consequences.

Several countries are developing lethal autonomous weapon systems that function without moral reasoning and situational awareness. Current international legal frameworks can't address the deep ethical dilemmas they pose. Work towards a global treaty on their use is hobbled by geopolitical divisions

Fourth, delegating lethal decisions to non-sentient machines erodes the ethical core of warfare, as LAWS cannot interpret surrender, intent, or moral nuance, thus violating principles like proportionality and humanity.

Fifth, the 'simulation-to-real' gap remains a persistent risk, as AI systems trained in constrained simulations may fail amid real-world battlefield complexity, sensor noise, or unexpected tactics. Sixth, the global spread of LAWS will lower the threshold for autonomous warfare. Cheap, dual-use AI components will empower both states and non-state actors, while the absence of verification norms will make it easy to embed autonomy covertly, destabilising arms control.

Thus, there is a need for a regulatory framework on LAWS. While the existing international legal regimes (including international humanitarian law, criminal laws, and Article 36 of Additional Protocol I of the Geneva Conventions) may formally apply, they are technically inadequate for regulating their unique risks. These frameworks presuppose predictable and human-controllable weapons, whereas LAWS make both *ex ante* legal review and *ex post* accountability nearly impossible. Core principles such as distinction, proportionality and precaution require moral reasoning and situational awareness.

Critically, current law offers no enforceable technical metrics, audit standards, or verification protocols. Ethical safeguards such as the Martens Clause are too abstract to effectively constrain systems that are incapable of recognising intent or emotions. In effect, the existing legal architecture, while symbolically comprehensive, is practically obsolete in the face of adaptive autonomy in warfare.

In 2023, the US came up with the Political Declaration on Responsible Military Use of Artificial Intelligence and Autonomy, which 50 countries had endorsed until November 2024. While the effort marks a welcome attempt at global norm-building, it remains non-binding and lacks any enforcement or verification mechanisms.

Thus, there is a need for a legally binding instrument on LAWS, just like the Nuclear Non-Proliferation Treaty. While momentum is building for a treaty, its adoption remains stalled due to persistent geopolitical divisions and procedural gridlock within the Convention on Certain Conventional Weapons.

A meaningful treaty must go even beyond this proposal and impose a categorical ban on fully autonomous weapons. No amount of regulation can fix the accountability vacuum, algorithmic bias, or risk of escalation these systems pose. The treaty should outlaw pre-delegated authority to kill, mandate human decision-making in every lethal engagement. Ultimately, the goal must be to prevent the normalisation of machine-driven violence and uphold human dignity as a non-negotiable baseline in conflict.

(Views are personal)
(On X @adityasinha004)

MAILBAG

WRITE TO: letters@newindianexpress.com

Threat assessment

Ref: *Nipah reality: Vigilance must outlast outbreak* (Jul 14). Along with vigilance, authorities and residents must come together to safeguard biodiversity. This is a crucial part of the fight against any large-scale calamity. Ongoing floods, mudflows and landslides cannot be seen as any less crucial than the Nipah outbreak.

Tejaswini Nayak, Koraput

Gender identity

Ref: *Semantics of address* (Jul 14). The clamour for gender-neutral titles is ludicrous. The female gender has its own typical identity which needs to be respected. Addressing a lady as Madam does not, in any way, belittle her stature. Equality and justice are more relevant than semantics.

Rajarao Kumar, Bengaluru

Algorithm-driven news

Ref: *The avertible influence of anti-US bluster* (Jul 14). Social media is here to stay, with more people drawn to it for news that has no journalistic filter. We are obsessed with eulogising our leaders, but our leaders are yet to match the competency description.

M Y Shariff, Chennai

Perennial wisdom

Ref: *A courtesan's awakening and Vyasa's subtle genius* (Jul 14). The column complements the significance of the ancient guru in enlightening times. Through the anecdote, the writer explains the mending and amending roles of a teacher. Veda Vyasa's teachings continue to illuminate many minds even after millennia.

Chandran Mekkunnu, email

Regular revisions

Ref: *People from Nepal, B'desh on Bihar list* (Jul 14). An invalid list including foreign citizens undeniably deteriorates people's trust in the electoral framework. A comprehensive electoral roll sans ambiguities is absolutely crucial for sustenance of a functioning democracy. Regular revision of electoral rolls is hence, indisputably vital.

Thomas K M, Ernakulam

Alcaraz dethroned

Ref: *Absolute Sinnema* (Jul 14). Jannik Sinner sported a more consistent performance powered by his astute forehand to ride to his maiden grass-court Slam, also a first for Italy. His three-hour battle against the title defender, Spaniard Carlos Alcaraz, finally ended a losing streak. Three cheers for the winner!

S Viswanathan, Tiruchirappalli

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Weaving opportunities

India can be a global leader in technical textiles

Charu Jain
Bornali Bhandari

IN DEMAND. Sustainable textiles

With nearly 2 per cent of the contribution to the country's GDP, India is the sixth largest exporter of textiles globally and holds 3.9 per cent share in world textile exports. The sector provides direct employment to over 45 million people and indirect jobs to over 100 million people (Ministry of Textile 2023-24). Estimated to touch $350 billion by 2030, the Indian textile industry is expected to create 3.5 crore jobs.

However, the National Accounts Statistics 2023-24 shows that the share of manufacture of textiles and cotton ginning in the country's GVA has been almost stagnant during 2013-18 and 2018-24, reflecting a CAGR of (-) 1 per cent. While the traditional sub-segments of the textile sector are facing glitches over the years, the new niche segments (technical textiles) are carving new paths. Further, the ongoing political unrest in Bangladesh has opened up both risks and opportunities in sustainable textiles, organic cotton, and eco-friendly manufacturing in India. While traditional textiles remains vital, the rise of technical textiles has opened a key opportunity.

ADVANCED TECH

Technical textiles is an advanced technology used for various applications ranging from automobiles to space applications. The demand for sustainable textiles is increasing particularly for applications such as packtech (biodegradable jute sacks), indutech (conveyer belts, etc.), hometech (blinds, fire-resistant curtains, etc.), meditech (non-woven absorbent pads) and sportstech (wearable technology for sports and fitness applications). Further, the 3D non-woven textiles have expanded the industry's reach into automotive, aerospace and protective gear manufacturing.

While the Indian technical textile industry is experiencing strong growth of 10-12 per cent (CAGR), the market is projected to grow from $29 billion in 2024 to $309 billion by 2047. The country has also become a net exporter of technical textiles recording a growth of 5.3 per cent CAGR from $1.99 billion in 2019 to $2.59 billion in 2024. The penetration rate is expected to increase from 13-20 per cent in 2026 to 40-60 per cent by 2047.

The government has introduced a range of policies, including the National Technical Textiles Mission (NTTM) and Production Linked Incentive (PLI) scheme, to give a boost to this sunrise sector. While the NTTM focusses on research and innovation, market growth, exports, PLI focuses on enhancing scale of production. The PM MITRA scheme has sanctioned seven integrated textile parks to improve infrastructure, supply chains and production efficiency. The government is reducing duties on new types of textiles machinery and correcting inverted duty structure to boost exports. Lastly, the government is focussing on creating jobs and skilling.

Over the next five years, the government aims to accelerate its market growth at 10-15 per cent. The NTTM plans to create 50,000 jobs.

This sector needs new range of skills starting from training in automation and digital technologies in manufacturing processes to a focus on sustainable practices.

However, the need of the hour is to strengthen the existing curriculum of textile engineering courses and making them more industry oriented, updated and practical, allowing students to make choices in their specific expert areas. The curriculum designing stages should involve active participation from industry professionals and offer industry internships or on-the job training to expose students to latest technologies and processes. These courses may be developed in collaboration with international universities that run more comprehensive technical textile engineering courses.

With better awareness, sufficient infrastructure, improved domestic machinery production and skilling, India has the potential to become a global leader in technical textiles.

Jain is Fellow, and Bhandari is Professor, at NCAER. The views are personal

India must not trade away its farms

HIGH STAKE. Agriculture is not a trade issue for India — it's the backbone of livelihoods and food security for small farmers

AJAY SRIVASTAVA

With President Trump's August 1 tariff deadline approaching, India's trade team frequently travels to Washington to finalise the trade deal. But what exactly is being offered? Why are US demands — particularly on agriculture — raising an alarm in India? And how are other countries handling Trump's harsh trade tactics? Let's have a closer look.

Four main features are emerging:

One-sided tariff terms: India may offer complete tariff elimination on US industrial goods and partial openings in agriculture (example, almonds, apples, corn, soy). In return, Washington is unlikely to match these concessions. The US is expected to issue only a non-binding letter stating that Indian goods will face 10-20 per cent tariffs, on top of existing MFN rates.

Forced purchases of US goods: The deal may require India to commit to multi-billion-dollar purchases of American products, such as LNG, oil, aircraft, military hardware and farm commodities. This mirrors recent Trump deals: the UK agreed to buy $10 billion worth of Boeings and ethanol; Vietnam committed to over $12 billion in aircraft and LNG.

Easier rules for US firms in India: Washington may push for regulatory changes that benefit US firms, such as access to India's government procurement market, dilution of patent protections, relaxed e-commerce norms for Amazon and Walmart, and unrestricted data transfers for American tech giants. India's decisions, like allowing Starlink to provide satellite internet services, highlight the growing risks of many more US demands.

Possibility for new tariffs after the deal: Even if India signs a deal, it may still face new US tariffs. President Trump has proposed a 10 per cent duty on all BRICS countries and a 500 per cent tariff on nations buying oil from Russia, India's leading supplier. Brazil was hit with 50 per cent tariffs partly because it asked social media platform X to remove certain posts. India could face similar action, as platform X has said most take-down requests come from India.

Many countries are facing similar pressure from the US. Trump's trade deals are one-sided "MASALA" deals — Mutually Agreed Settlements Achieved through Leveraged Arm-twisting.

The US is negotiating with over 20 countries and seeking concessions from more than 90. Talks are at an advanced stage with Japan, South Korea, Thailand, Indonesia, India, Australia, the EU, and Canada. Early talks are also underway with Cambodia, Malaysia, the Philippines, Taiwan, and Mexico.

So far, only the UK and Vietnam have signed such one-sided deals. Others are holding up. Frustrated by resistance, Trump has announced 30 per cent tariffs on the EU and Mexico to pressure them into agreement.

The Table shows US demands on different countries and how they're responding.

Status of US trade talks with key partners

Country / Region	US demands	Partner country concerns	Status	Likely outcome
EU	Guaranteed purchases of US LNG, beef, and aircraft; lower tariffs on US autos and steel; broad access to EU agriculture markets	Worries about harming EU farmers and auto sector; won't drop CBAM; fears Trump may still impose tariffs later	Talks ongoing, but tense. Trump has threatened 30% tariffs	Uncertain
Japan	Guaranteed buys of meat, LNG, aircraft; access to rice and government contracts; relaxed auto standards	Rice is politically sensitive; risk of domestic backlash; fears deal won't stop future US tariffs	Talks slow due to political resistance	No comprehensive deal expected; symbolic ties likely
South Korea	More duty-free access for US meat and LNG; relax food safety and auto rules; support US aviation	Fears of damage to farmers; concerns Trump will demand more even after deal; lack of trust despite existing FTA	Talks continue, but little headway	Possible MoU or narrow deal
Australia	Cut tariffs on US drugs, metals, meat; allow more access to agri and rare earths; commit to large US purchases (meat, energy, defence)	Resentment over US tariff hikes despite existing FTA and trade deficit; reluctant to lock in quotas	Negotiations active, but unresolved	Mini-deal likely
China	Lower tariffs on U.S. goods; commit to buying US energy and aircraft; reform SOEs, digital, and subsidies	Strong opposition to political demands; fears of losing strategic autonomy; deep distrust of US	Fragile ceasefire in select sectors	No broad deal, only standstills
India	Reduce tariffs on autos, dairy, grains; allow GM feed; remove data localisation; commit to big US buys (oil, gas, defence)	Concerns over impact on 700 million farmers, food security, digital sovereignty; fears new tariffs even after deal	Final-stage talks for limited deal	Uncertain. Partial deal likely, with US charging 15% base tariffs

PRESSURE TO OPEN UP

The US wants access to India's dairy, food, and farm markets. But with over 700 million Indians dependent on farming — much more than China (350 million), Japan (4 million), the EU (30 million), or South Korea (1.5 million) — India has far more at stake. Opening up could expose Indian farmers to subsidised US imports. While India is open to cutting industrial tariffs, including on cars, it is holding firm on protecting agriculture.

Below are key US demands and the potential impact on Indian farmers.

> **Cutting import tariffs on key crops could expose farmers to cheap, subsidised US imports and global price swings**

The US wants duty-free entry for subsidised dairy products like cheese, whey, and milk powder, raising concerns about harm to over 80 million small dairy farmers. The US also wants zero-duty access for frozen chicken legs. This could hurt prices and affect the livelihoods of 30 million people in India's informal poultry sector.

Another flashpoint is the US push to allow genetically modified (GM) animal feed, particularly soyameal and distillers' dried grains with solubles (DDGS). India currently bans GM feed to maintain its GM-free status and preserve access to markets like the EU. Experts warn that even allowing "non-GM" imports of corn or soya meals on a self-certification basis would be risky. US laws do not require segregation between GM and non-GM crops at the farm level, making enforcement nearly impossible. Whether GM products are suitable for India is a serious decision that needs careful thought, and it is not something to be done to please the US in haste.

Washington is also demanding easier access for cheap US wheat and rice. This could depress domestic prices, discourage sowing by Indian farmers, create long-term reliance on imports, and put the lives of hundreds of millions of farmers at stake.

Other demands include lower tariffs on US apples, potentially displacing local growers in Kashmir and Himachal Pradesh. The US also wants to reduce the duties on genetically modified soyabean oil. This could damage India's edible oil sector, affecting up to 6 million oilseed farmers.

Cutting import tariffs on key crops could expose farmers to cheap, subsidised US imports and global price swings. In the past, global price crashes (like in 2014-16) could have devastated Indian farmers without tariff protection, while later spikes (like in 2005-08) left countries like Ghana and Nigeria scrambling for costly imports.

A WORD OF CAUTION

India risks diluting its trade, tariff and domestic policies in a one-sided trade deal with the US, while getting little in return. Even if India agrees to such a deal, President Trump could slap new tariffs for arbitrary reasons.

India should not trade away the farm. Countries with much smaller farm populations than India refuse to open agriculture in their US trade talks. India should take note, consult widely, and proceed cautiously before committing. Agriculture is not a trade issue for India — it's the backbone of livelihoods and food security for over 700 million small farmers.

Before making any concessions on agriculture, Indian negotiators must never forget the faces behind the fields — the millions of small farmers battling drought, debt, and despair daily. Their fragile livelihoods hang in the balance.

The actual gains from such MASALA deal may be small compared to the risks of walking away.

The writer is the founder, GTRI

thehindubusinessline.

TWENTY YEARS AGO TODAY.

July 15, 2005

AP to seek CBI probe into deals over Volkswagen

The Andhra Pradesh Government has decided to seek a probe by the Central Bureau of Investigation to clear the air surrounding investments into Vashishta Wahan (P) Ltd, a special purpose vehicle created for the proposed Volkswagen greenfield car plant in the country. Chief Minister Dr Y.S. Rajasekhara Reddy, said: "The whole issue must be investigated by an independent agency at the highest level and clear doubts surrounding investments into the project."

Finance Ministry to come out with clarifications on FBT

The Finance Ministry would issue a circular clarifying the provisions of law on the Fringe Benefit Tax (FBT) before the end of next week, a top Central Board of Direct Taxes (CBDT) official has said. Industry has a number of issues on FBT that it feels are hazy and hence need to be settled

Gold trading in demat form launched

Investors can now buy, hold and trade gold in dematerialised form without having to worry about parking it in a vault for its safe-keeping. The Multi Commodity Exchange (MCX), in association with the World Gold Council, has launched a new product — a gold contract that is settled in a week (T+7).

China emerges from trade chaos with record exports

Bloomberg News

China ended the first half of the year with a record trade surplus of about $586 billion after exports to the US began to stabilise, as factories rode out the tariff roller-coaster that upended global commerce.

Exports rose 5.8 per cent in June from a year earlier to $325 billion, exceeding the median estimate in a Bloomberg survey of analysts. Imports rose 1.1 per cent to grow for the first time since February, according to data from the General Administration of Customs on Monday.

Shipments to the US fell 16.1 per cent from a year earlier after slumping by over 34 per cent in May. Chinese firms were able to increase their sales in other markets to compensate for the drop to the US, with exports to the 10 Southeast Asian nations in the Asean group soaring 17 per cent from a year earlier.

PRESSURE RESISTED

"China's trade resisted pressure and progressed in the first half of the year," Wang Lingjun, deputy head of the customs agency, said at a press briefing.

Diversions of exports away from the US help explain the resilience of Chinese factories, supporting a slowing domestic economy during one of the most turbulent periods in international trade. The question now is how long the recent strength will last, as the Trump administration looks to curb the transshipment of goods to America through other countries.

The US last week announced a raft of new levies on trading partners, declaring those tariffs will take effect on August 1. It also unveiled a 50 per cent tariff on copper imports and signalled more sectoral levies are in the works.

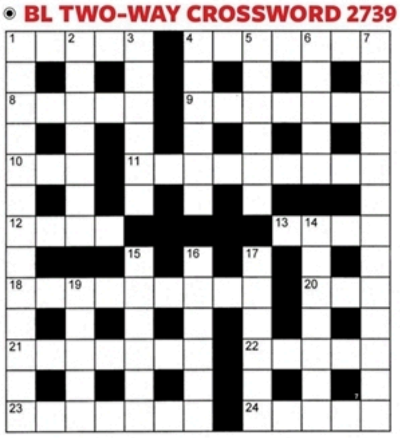
SMOOTH SAILING. China's exports

"The pick-up in headline export growth mainly reflected the rebound of US-bound exports in June, likely due to the substantial tariff reduction following the US-China trade talks in Geneva in May," Goldman Sachs Group Inc. economists including Andrew Tilton said in a report. "Both export and import growth surprised to the upside."

While US tariffs on Chinese goods have been cut back to around 55 per cent, down from as high as 145 per cent in early April, Beijing faces mounting risks from Washington's evolving trade strategy.

A new agreement with Vietnam, for instance, includes a 20 per cent tariff on Vietnamese exports to the US and a steeper 40 per cent duty on goods deemed to be transshipped, targeting a workaround Chinese exporters have long used to evade American tariffs. The move could curb demand for Chinese products headed directly to the US as well as for components used in supply chains across other countries.

BL TWO-WAY CROSSWORD 2739



EASY

ACROSS

1. Show clothing (5)
4. Shaped like dunce's cap (7)
8. She-goat (5)
9. African country (7)
10. A tarboosh (3)
11. Top up again (9)
12. Scullery basin (4)
13. Use spoon (4)
18. Wormwood, southernwood etc (9)
20. Tea (3)
21. Copy (7)
22. Jail (5)
23. Fail to attend to (7)
24. Intoxicated (5)

DOWN

1. Act of disclosing what is dark (13)
2. An inhabitant (7)
3. Beds, strata (6)
4. Savoury morsel with drinks (6)
5. Lump as of gold (6)
6. Welsh dog (5)
7. Larva of crane-fly (7,6)
14. Material for mattress-cover (7)
15. To transfix (6)
16. A view, look (6)
17. Talisman (6)
19. Making a knot (5)

NOT SO EASY

ACROSS

1. A pattern of fashion at end of April (5)
4. Round at the bottom, pointed on top, coil can be unravelled (7)
8. Billy's mate is a children's nurse (5)
9. Country may be given an airing around the East (7)
10. Tarboosh from somewhere in Morocco (3)
11. Her spline being crooked, fill it up again (9)
12. Go to the bottom of the cesspool (4)
13. Some agitation in 22 (4)
18. Wormwood is a term used by half of Asia (9)
20. Tea found in leaving where it comes from (3)
21. Copy a time it takes to compile (7)
22. Sound of glasses touching in prison (5)
23. Fail to attend to carbon in gentle shake-up (7)
24. It is mean to be closely fought (5)

DOWN

1. Appearance of ghost might have caused famine at Waterloo (13)
2. Inhabitant of New Zealand I need to exchange (7)
3. Strata of pullets and hens (6)
4. Snack with drinks one is able to 21 (6)
5. Valuable chunk of egg turned up in Brazil (6)
6. Dog from Chinese capital opera Prince turned to (5)
7. Hide coat from crane-fly grub (7,6)
14. The making of a mattress-cover is going like clockwork (7)
15. Transfix me, and a lip gets broken (6)
16. A way of viewing one's attitude in the air (6)
17. Mother's bed – lucky for some! (6)
19. Achieving a draw with a Granny? (5)

SOLUTION: BL TWO-WAY CROSSWORD 2738

ACROSS 1. Legerdemain 8. Gloom 9. Audible 10. Trestle 11. Orbit 12. Easily 14. Isobar 18. Chain 19. Envelop 21. Armhole 23. Regal 24. Rattlesnake

DOWN 1. Legatee 2. Growers 3. Remit 4. Enamel 5. Arduous 6. Nub 7. Cheat 13. Line-out 15. Bologna 16. Repulse 17. Repeal 18. Crass 20. Virus 22. Mir

DELHI
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thehindu businessline.
TUESDAY - JULY 15, 2025

Pharma frontier

Glenmark's drug breakthrough, a watershed

Indian drugmakers have cemented their spot as global providers of affordable medicines. But now, an Indian company has delivered a promising innovative anti-cancer drug molecule to deep-pocketed Big Pharma for further development and possible commercialisation in some years, if all goes well. This is a watershed moment.

Last week, India's Glenmark Pharmaceuticals illustrated the power of staying the course in research, when its wholly-owned subsidiary Ichnos Glenmark Innovation Inc (IGI) formalised an exclusive licensing agreement with American drugmaker AbbVie on its lead investigational drug candidate ISB 2001, for an upfront payment of $700 million (estimated ₹6,000 crore). New York-based IGI's drug candidate is still in its early stages of clinical trial, (Phase 1b), but has shown promise in treating patients with relapsed/refractory multiple myeloma. The quality of IGI's data was critical in clinching the deal — presented at global conferences and withstanding the intensity of international scrutiny. After all, Big Pharma will not put big money on a drug candidate, unless it's optimistic that the drug could make it to market. In fact, IGI is further eligible to receive up to $1.225 billion in development, regulatory, and commercial milestone payments, besides double-digit royalties on net sales. The Glenmark/IGI-AbbVie deal is pegged among the top three global transactions in the last couple of years — and it should inspire more Indian companies to stay focused on innovation, streamlining to doing a few things, but doing it well.

For the Indian pharmaceutical industry, there are multiple takeaways from Glenmark's strategy on creating innovative products and licensing them out to companies that could take it forward. Glenmark would testify to 25 years of arduous work. The research on ISB 2001 was done in different countries, and that global approach also helped in generating quality, confidence-building data. Indian innovations need to benchmark themselves against the global best, to be recognised. The drug candidate ISB2001, now with AbbVie, has a few more rounds of clinical trials, before it hits the market, if all goes to plan.

Drug development and research requires deep-pockets, over $2 billion by some estimates, and at least a decade of research. And it still may not deliver a winner. But as the US biotech ecosystem has shown, companies do original work to develop a promising candidate and leave it to the big drugmakers to do the heavy-lifting thereafter. Change is in the air, with automation and AI also looking to cut-short drug-delivery timelines, and possibly costs too. Indian drugmakers are pushing the research envelope with their work on CAR-T therapies in cancer treatment and novel antibiotics. But there needs to be a wider research ecosystem, risk-funding and unflinching vision and support from industry leaders. Glenmark's success has shown it is possible for India to break into the big league of global research, after ruling over the global generics market.

POCKET

RAVIKANTH

"I don't know about AI or robots, but I am worried about the day these machines take over our world!"

Tweak in sulphur norms will cut electricity costs

The earlier norms have now been made location-specific. The revision in norms will help gencos financially

CAPITAL IDEAS.

RICHA MISHRA

The dictum "No-one-size-fits-all" is true in the energy and environment space, and after much arguments, the policy makers seem to have acknowledged it.

On July 11, the Ministry of Environment, Forest and Climate Change (MoEFCC) came out with a notification which eased sulphur emission rules for most coal-fired power plants. This move is expected to cut electricity costs by 25-30 paise per unit.

The sulphur dioxide emission standards were brought out by the Ministry on December 7, 2015, for coal and lignite based thermal power plants. It also prescribed certain timelines, which were amended from time to time.

Flue Gas Desulfurisation (FGD) is a process used to remove SO2 from the flue gas produced when burning fossil fuels such as coal or oil or natural gas. Since April last year, debates and discussions have been taking place between the Ministries of Environment and Power over the relevance of FGDs to control sulphur dioxide emissions from coal-fired thermal power plants.

Section 7 of the Electricity Act 2003 prescribes that any generating company can establish, operate and maintain a generating station without obtaining a licence under the Act, if it complies with the technical standards relating to connectivity with the grid referred to in clause (b) of Section 73 of the Act.

However, all thermal power plants are required to comply with the emission norms as notified by the Environment Ministry and the directions given by CPCB from time to time.

The Environment Ministry notification of December 2015, which was last amended in December 2024 stipulated stack emission norms (including for Particulate Matter (PM) and Sulphur Di-oxide(SO2)) based on the age of the plant, timelines for compliance based on the categorisation of these TPPs based on location, and Environmental Compensation, in case of non-compliance.

The government has split the thermal power plants into three different categories:

Category A: Within 10 km radius of National Capital Region or cities having million plus population;

Category B: Within 10 km radius of Critically Polluted Areas declared by CPCB2 or Non-attainment cities under the National Clean Air Program;

Category C: Other than those included in category A and B.

CALL FOR EASING NORMS

In its latest notification, the Environment Ministry has said that it received many representations regarding exemption or relaxation in timelines of these emission standards due to limited availability of technology providers, its techno-economic feasibility, negative impact of Covid pandemic on supply chain, price escalation due to high demand and low supplies, low sulphur dioxide concentration in ambient air and the heavy burden on consumer due to increase in electricity tariffs, etc.

> **Several studies were conducted by research institutions regarding effectiveness** and rationale behind these standards and their role in overall ambient air pollution of the region

It also said that explicit recommendation of the Power Ministry was received in this regard.

The Environment Ministry also noted that several studies were conducted by research institutions regarding effectiveness and rationale behind these standards and their role in overall ambient air pollution of the region.

A committee in the Central Pollution Control Board was constituted to examine the issue, assess the available study reports, other relevant materials and other related factors and make a recommendation on the applicability of these standards and its timeline, it said.

The three different studies were done by IIT Delhi, CSIR-NEERI and National Institute of Advanced Studies (NIAS) at Bengaluru, respectively. All these studies were conducted independently and were commissioned by different government departments.

The key common point in these three scientific studies is that, fitment of FGDs in all TPPs in India is not necessary to comply with the NAAQ standards whose compliance is directly related to public health.

REMOVING UNCERTAINTY

Clearly, the Ministry wants to remove the uncertainty over FGDs in the minds of the industry without causing any harm to public health. On the other hand, the Ministry has not made any change in the stack emission standards for PM pollution since it is the key concern for public health. Further, the Ministry has also mandated that all plants in Category A must comply with the SO2 emission standards by December 31, 2027 while plants in Category B must comply by December 31, 2028 unless they are granted specific exemption by the Ministry.

According to R Srikanth, Professor & Dean of School of Natural Sciences & Engineering, National Institute of Advanced Studies, Bengaluru, and co-author of the NIAS study, "Indigenous High-efficiency Electrostatic Precipitators (ESPs) have been successfully retrofitted even in thermal power plants with space constraints and have demonstrated their capability to achieve the above stack emission standards for PM.

"Therefore, PM pollution control in plants must be prioritised by retrofitting High-efficiency ESPs in all 537 existing thermal power plants to comply with the PM stack emission norms within the next two years."

On the other hand, the installation of FGDs indiscriminately in 537 existing plants has a significant impact on global warming by removing coolant sulphate aerosols which mask global warming (as per the Sixth Assessment Report of the Intergovernmental Panel on Climate Change issued in 2021) besides increasing freshwater consumption in inland plants. This will impact our climate commitments and reduce water security while imposing significant capital investments leading to tariff hikes for electricity customers.

Critics say the earlier decision was a hurried one. A lesson from this is that before in policy decision is taken, there is a need to have proper scientific studies covering various parts of the country followed by stakeholder consultation.

Aadhaar: New features seek to address pain points

The QR code app will crucially ensure privacy and give citizens more control over their data

Roopa Kudva

In a significant step, UIDAI is set to roll out a new QR code based app that will allow individuals to update their Aadhaar details from the comfort of their homes. Except for biometric updates like fingerprints or iris scans, most changes — including name, address, and mobile number — will soon be possible online, using an app equipped with advanced verification protocols.

The new system, expected to go live by November, will draw from authenticated government databases such as PAN, passport, driving licence, and PDS and MNREGA registries to cross-verify user-submitted information. Also under consideration is integrating electricity bill databases into the verification network. This can reduce paperwork and also help prevent the use of forged documents.

The app also introduces QR code-based Aadhaar sharing, offering users control over when and how their data is shared. For example, while checking in at a hotel customers can share a full or masked version of their e-Aadhaar through secure, mobile-to-mobile channels — only with explicit consent.

Aadhaar now has become an integral part of the citizens of India. Despite its wide acceptance concerns over data security, exclusion, and usability persist.

PAIN POINTS

Three challenges in particular have been flagged by both users and researchers. Updating Aadhaar details has been a key pain point. A study by Dalberg in 2019 revealed that one-third of those who attempted updates found it difficult; 20 per cent couldn't complete the process successfully.

The friction is particularly acute among vulnerable populations. Homeless individuals and people of the third gender face both higher barriers to enrolment and greater risk of exclusion. The Dalberg study found that 30 per cent of homeless individuals and 27 per cent of third-gender respondents lacked Aadhaar.

Even when enrolled, they were likely to find the process difficult, often due to lack of documentation. For the third gender, misclassification of gender identity was more common, leading to denial of services and systemic frustration.

These findings underscore that digital ID infrastructure must be matched by human-centred implementation, and UIDAI's efforts to digitise and decentralise Aadhaar updates are timely.

AADHAAR. User-friendly moves
BLOOMBERG

Still, there are concerns especially about privacy and misuse. The idea of a system this centralised — linking everything from welfare benefits to mobile numbers and financial services to a single ID — has sparked greater focus on safeguards that are not just legal, but also user-friendly and transparent. While the new app draws on multiple government databases to enhance verification, this could raise privacy concerns for some users.

In some ways therefore, the new QR code-based app is an important symbolic shift. It empowers users to control their identity, dictate access, and minimise data exposure. A well-implemented consent architecture can reinforce user agency and build greater trust.

Aadhaar's digital features continue to be underutilised. Many users rely on physical photocopies rather than e-Aadhaar. Awareness and digital literacy in rural areas are particularly low.

Unless accompanied by communication campaigns, support services, and mobile literacy efforts, even the best tools can remain out of reach. Retaining easy options for offline updates is critical.

Next on the cards is strengthening regulations on privacy, consent, and the responsible use of Aadhaar-linked personal data. The government proposes to amend the Aadhaar Act to align it with the Digital Personal Data Protection (DPDP) Act, 2023.

This aims to provide users greater control over their data by emphasising data minimisation, the right to erasure, and stricter limits on how Aadhaar data can be reused or shared beyond the original scope of consent.

As India moves forward on digital governance, the Aadhaar infrastructure will undoubtedly continue to evolve and upgrade in tune with shifting perceptions, emerging concerns, and user needs.

The writer is a business leader and start-up investor, who headed both Crisil and ONI.

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.

Inflation worries

This refers to the report 'June retail inflation print, too, seen under May's 2.8%' (July 14). Albeit the lower inflation rate, the cost of food and medicines is impacting the common man.

Given the rising cost of living and shrinking disposable incomes, reliance on the retail inflation rate for deciding policy rates for regulating the supply of money needs to be reviewed. A further cut in the repo rate for the sake of reducing the cost of capital will be counter-productive to consumption. Policy rate cuts do not necessarily increase demand for credit. A holistic approach is imperative to keep the prices of essential commodities stable to spur growth.

VSK Pillai
Changanacherry

Shun freebies

The article 'Useless information has huge political utility', (July 14), reiterates and exposes how hollow - most times absurd - inferences are peddled in the public domain to develop narratives suiting the interests of the proponents.

Lorenz curve or Gini are only as good as the underlying data cannot be overstated. So also the fact that the interpretations and inference therefrom should be unbiased. Equality can never be achieved or equated with freebies: but the very core of many welfare programmes tend to be squandering scarce resources, corroding the spirit of enterprise, fostering a culture of lazy expectations. It is high time we work towards a more responsible government administration, lean and mean, but aimed at the development of whole society.

Jose Abraham
Kottayam

Dark stores of Q-Comm

The article throwing the light on dark grocery stores (July 14), directly relates to the major cause of public health and hygiene at the cost of fast delivery. There should be standard FSSAI norms of hiring or setting up godowns and stores.

Since most of the grocery products have short expiry, the e-commerce companies should be mandated to comply with FSSAI standards through a compliance portal and the inspection reports and compliance of food safety rules and regulations should be regularly reported on such portals. The recent complaints of spurious food items supplied by an e-commerce company have alerted the people and regulators. It may be borne in mind that our local mandis and weekly vegetable markets should not be uprooted by these e-commerce companies, therefore, they should be restricted to only metro cities.ractically, the FSSAI network is not visible to people and we don't know how to complain to them if unhygienic products are sold by e-commerce companies. At least our local grocery stores are accountable and resolve the issues quickly.

Vinod Johri
New Delhi

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IBC reset needed

Delays must be addressed

As reported by this newspaper, the Parliamentary Standing Committee on Finance, in a meeting last week, discussed the possibility of establishing a dedicated National Company Law Tribunal (NCLT) and the National Company Law Appellate Tribunal (NCLAT) to expedite the resolution of insolvency cases under the Insolvency and Bankruptcy Code (IBC). Since the government is expected to introduce amendments to the IBC in the upcoming monsoon session of Parliament, the committee would do well to take this discussion forward and make suitable recommendations. The implementation of the IBC is seen as one of the most significant reforms in recent decades. For a large market economy like India, it is crucial that the IBC functions as intended and provides a smooth and timely exit to firms. However, that has not been the case, largely because of delays in the resolution process. The Supreme Court's judgment in the Bhushan Power and Steel case, which set aside the resolution plan, has added another layer of complication which also needs to be addressed.

The NCLT was established to administer company law and now has the additional responsibility of adjudicating IBC matters without much improvement in capacity. Thus, delays in IBC matters should not surprise anyone. However, now with eight years of experience, the government must address the gaps. One way to address the delay is to establish a dedicated NCLT and an appellate tribunal, as reportedly discussed by the committee. The other and more straightforward solution is to increase the capacity of the NCLT and NCLAT quickly. The government should also thoroughly look at other reasons for delays in the process. The IBC aims to resolve insolvencies at the earliest, with a maximum period of 330 days. However, as the latest quarterly newsletter of the Insolvency and Bankruptcy Board of India showed, 1,194 corporate insolvency resolution processes (CIRPs) that yielded resolution plans till March 2025 took an average of 597 days. Further, 2,758 CIRPs that ended up in liquidation took an average of 508 days.

While there is a need to address delays, the IBC has nonetheless had a positive impact on the banking system and credit culture in the country. As of March 2025, a total of 8,308 cases had been admitted, and 6,382 had been closed. In close to 1,200 cases that resulted in a resolution plan, creditors recovered about 33 per cent of the admitted claims, translating into roughly 170 per cent of the liquidation value. In terms of impact on credit culture, the NCLT data shows that over 30,000 cases were settled prior to admission till December 2024. Further, a study by the Indian Institute of Management Bangalore showed that the IBC had prompted borrowers to adhere to the loan schedule, and there had been a significant reduction in loan accounts termed "overdue". Improving credit culture was one of the objectives of the IBC. Promoters now have the real fear of losing control of their companies.

Therefore, to further improve outcomes, insolvency cases must be admitted and resolved in a timely manner. The government has been working on improving the ease of doing business, and a smooth exit for firms is a significant part of the process. Thus, weaknesses in this area must be addressed immediately. Besides, the law also needs to be amended to provide more certainty to the process. If resolution plans can be set aside years later, it undermines the credibility of the insolvency process and raises questions about the very foundations of the Code. This cannot be allowed to persist.

West Bengal: Back to the future

Building an investment culture will be challenging

As symbolism goes, the meeting between West Bengal Chief Minister Mamata Banerjee and Tata group Chairman N Chandrasekaran could not have been more significant. Seventeen years ago, Ms Banerjee made the Tata group's signature Nano plant in Singur the focus of her campaign to oust the Left Front from its more than three-decade rule in the state. Her high-decibel crusade, centred on defending the rights of those who had been unwilling to sell land for the project, worked. The group exited Singur in 2008 and relocated to Sanand, Gujarat, when Narendra Modi was chief minister there, with then group chairman Ratan Tata making elliptical allusions to "Good M and Bad M". Behind the optics of the new-found bonhomie with his successor is a hard reality. State elections loom in less than a year. With the Bharatiya Janata Party having made inroads into Trinamool strongholds, the lack of meaningful investment in the state is becoming glaringly evident even as nearby Odisha, Telangana, and Andhra Pradesh surge.

Mr Chandrasekaran and Ms Banerjee reportedly discussed private-public partnerships in the context of economic growth in the state. The irony of this visible reset in relations is hard to ignore. Ms Banerjee's campaign against the Tata plant and a petrochemicals hub in Nandigram with Indonesia's Salim Group — the biggest foreign direct investment project in the state at the time — helped propel her party to power. But her regime has proven singularly unsuccessful in attracting employment-generating manufacturing investment. Instead, groups that had large investment plans in the state under the Left Front's belatedly reformed industrial policy — JSW Steel, Videocon, and the Salim group — exited. Borrowing from her predecessor's playbook, Ms Banerjee has regularly made high-profile visits to places such as the United Kingdom and other European countries, and Singapore, to drum up investment for her state. But West Bengal's share of foreign direct investment has been less than 1 per cent.

Annual "Global Business Summits" yielded extravagant praise from business people but with little to show for it. Infosys and Wipro have back offices on the outskirts of Kolkata, and Reliance Industries has claimed to have invested over ₹50,000 crore in digital services and retail businesses in the state between 2016 and 2025. Tata Consultancy Services, too, has a large presence, employing 54,000 people across multiple locations in the state, including a proposed investment in an upcoming tech centre, and the group's construction-machinery plant in Kharagpur is one of Asia's largest. But this investment has not transformed the state into, say, tomorrow's Karnataka or Gujarat. In fact, a parliamentary reply in December last year revealed the startling fact that 2,227 companies, 39 of them listed on the stock exchanges, relocated their registered offices out of West Bengal to other states between 2019 and 2024.

To become a genuine game changer, Ms Banerjee needs to transform the dynamics of the state's investment culture. Her inability to rein in burgeoning political violence, including disturbing reports of her government's anodyne response to rapes, work-to-rule unions and Ms Banerjee's own idiosyncratic style are not reassuring for stability-seeking investors. Her refusal to adopt new labour codes that ease hire-and-fire norms — a longstanding industry demand — and standardise compensation is hardly helpful. Mr Chandrasekaran's visit could signal a genuine intention to reform. How radically and rapidly she can do that will be a test of her mettle.

ILLUSTRATION: BINAY SINHA

The margin trap

Indian entrepreneurs must get on the innovation cycle and not fear a backlash over a short-term drop in profitability

One of the clear takeaways when speaking with senior people working with Apple is their disappointment at the lack of willingness among India Inc to step up and make the investments needed to bring the Apple ecosystem into India. While China is putting up obstacles, the profit focus of Indian entrepreneurs is also a stumbling block. Whether it is putting up the component supply chain or making large capital investments for display units, there is a lack of interest on the part of large Indian groups to commit capital.

They cite the low margins on offer and the intense scrutiny that Apple demands on quality and scale. In effect, it would take years of sustained effort to earn a reasonable return on capital — if at all. Is it worth it? Many believe they would be derated by their shareholders, who would not accept the initial losses and question the ultimate return on capital. With a drop in margins will come pressure on valuations and market capitalisation — this is the common belief among Indian industrialists.

AKASH PRAKASH

Indian markets are hyper-focussed on profitability and return on capital, producing numerous multi-year compounders as a consequence. India has among the best long-term equity market return profiles in the world, and the focus on capital discipline has been a strength. One reason India has delivered much stronger returns than China (over the past 25 years, China delivered 4 per cent real returns compared to India's 6.9 per cent) is this sharp focus on profitability and capital allocation. Global investors appreciate that Indian entrepreneurs understand the cost of capital.

However, could this intense focus on profitability and market capitalisation be turning into a long-term weakness? Have Indian investors become so focused on short-term profitability that they are not giving our companies the space to make the long-term investments needed to succeed and become global leaders? After all, whenever you are trying to break into a new business and acquire global scale or capability, it will require upfront investment and losses. Innovation is also inherently risky.

How is it that Apple has had no difficulty finding suppliers in China? Chinese suppliers have been willing to accept lower margins for the chance to learn the technology and acquire scale. This has made them a manufacturing powerhouse, accounting for 32 per cent of global manufacturing.

Or is it that, unwilling to put in the hard grind needed to break into and compete in a global supply chain — or to take the risks inherent in innovation — Indian promoters are conveniently blaming investors? Maybe the high valuations are lulling everyone into complacency. If you can get a multi-billion-dollar valuation just by being a participant in the India growth story, why do anything different?

Take the case of the Indian IT services players. Despite earning margins of over 30 per cent in their heyday, they never spent meaningfully on research and development (R&D) — not even a few percentage points of revenue. When asked about this, they would always blame their investor base, saying they could not let profitability drop, even temporarily, as investors would punish them in the market.

While China may be a poor template — with a corporate sector heavily subsidised by the government, lacking discipline in capital allocation, and intensely focused on size and scale at all costs — the US is a model worth emulating. On Wall Street, it is normal for technology/healthcare and consumer companies to spend over 10 per cent of sales on research or branding, and they get penalised if they spend less. As an example, Alphabet alone spends $50 billion on R&D, equivalent to over 1 per cent of Indian gross domestic product! It is common to see companies take their current profitability and cash flows to build new businesses, in order to extend their growth horizon.

Microsoft, for instance, took six years to build its Azure Cloud business, losing over $10 billion in the process. Yet investors remained patient, and the company had the clarity to keep investing, regardless of the short-term impact on margins. They are now doing the same while building out their artificial intelligence (AI) business. You have examples of Netflix and Amazon, world-leading innovative business models, which investors were willing to back in the public markets despite taking years to turn profitable.

How is it that public markets in the US — the most short-term oriented and intensely capitalist in the world — were willing to back and value loss-making businesses like these, while we seem unwilling to do the same in India? Is it that US companies can take these incubated businesses global and create disproportionate value? The successful businesses create such value that it is worth funding the initial losses? Amazon, for example, has compounded its market capitalisation at 32 per cent annual rate since listing in 1997. High valuations in the US markets seem to be a structural advantage in encouraging innovation and risk-taking as the payoff profile for success is worth the risk.

To be fair, this willingness to value innovation and new business optionality is unique to the American financial markets. The US has a model of government funding for basic research, strong academic partnerships with industry, and venture capital and other investors supporting companies at every stage of their lifecycle. In India, we need to strengthen the academic–industry–government partnership. We also need venture capital that is willing to look at deep tech and areas beyond consumer-focused apps. And we need public market investors who are prepared to look beyond short-term margins and back companies that are trying to scale new businesses.

India Inc spends less than 1 per cent of sales on R&D. Despite lower labour costs and minimal R&D, its margins are no higher than those of global peers. We generate fundamentally lower gross margins, linked to lower value addition. India has the possibility of creating an environment similar to that of the US, where investors are willing to look through initial losses as companies build new businesses. The payoffs in India for building a new business or acquiring global scale are enormous. Markets reward success disproportionately.

Given its robust private and public market ecosystem, India has a chance to be the only other market besides the US that is willing to value loss-making businesses and take a longer-term view in evaluating success. We can convert our high valuations into an environment where risk-taking is encouraged. We are probably the only large market that can realistically hope to emulate the US, as we have a similar payoff profile where markets reward success disproportionately.

In my view, India's top entrepreneurs — those with credibility and a proven track record — will find support from public market investors and will be given the space to invest and build new businesses. The public markets are not as short-term focused as they are often perceived to be. Companies may find it better to raise growth capital from public markets rather than from private equity, which typically demands a minimum return and has only a five-to-six-year horizon.

India needs to get on the innovation cycle — and everyone has a part to play. The government must provide basic funding and strengthen linkages between industry and academia. Private markets must support genuine innovation and public market investors must not obsess about short-term margins. We can create a risk-taking culture that no country other than the US has managed. We must aspire to this — and work towards it.

The author is with Amansa Capital

Trade war: A second chance for India

India, like any country, integrates with the world through goods, services, and financial flows. It has done very well in the latter two. Now, it has a chance to emerge as a key player in global goods trade — potentially boosting its slowing gross domestic product (GDP) growth. The key question is: Can policymakers enable this shift?

Services trade from India has become a major success. From 2005 to 2023, India's share of global services exports doubled — from under 2 per cent to over 4 per cent. Over the past decade, services exports grew over 8 per cent annually and now make up 44 per cent of India's total exports, well above the global average of 25 per cent. At the same time, gradual easing of capital controls has deepened India's financial integration. Between 2011 and 2023, foreign portfolio inflows rose from $180 billion to $460 billion, with their share of GDP increasing from 11 per cent to 14 per cent.

MACRO PULSE

RAJESWARI SENGUPTA

In contrast, goods exports have fallen behind. From 2014 to 2024, they grew at just 3 per cent annually — down from 17 per cent in the previous decade. This slowdown coincided with a rise in protectionism, as average import tariffs doubled from 6 per cent in 2013 to 12 per cent in 2023.

In contrast to India's journey, China's share of global goods exports jumped from 4 per cent in 2001 to over 14 per cent in 2024. However, its rise hasn't been without controversy. China has often been accused of violating World Trade Organization (WTO) rules by unfairly supporting its manufacturers with subsidies, tax breaks, and cheap loans. Things got worse from 2017 as China grew more authoritarian. Its strict, nearly three-year-long Covid-19 lockdown and the resulting supply chain disruptions exposed the risks of over-reliance on its economy. This raised political concerns in the US — China's largest export market — and triggered efforts to reduce dependence. The major shift in US trade policy today stems largely from this.

After Covid, global manufacturers adopted a "China+1" strategy, shifting parts of their supply chains to other countries. Vietnam, Thailand, Cambodia, and Malaysia benefitted — but India largely missed out due to policy hurdles. From 2017 to 2023, India's share of global goods exports remained flat at around 1.7–1.8 per cent, while tiny Vietnam's rose from 1.5 to 1.9 per cent.

In the latest phase of the trade war, the US has threatened tariffs of 25–40 per cent on imports from 16 countries, including Canada and Mexico, and a 30 per cent tariff on the European Union effective August 1. Tariffs on Chinese goods already exceed 30 per cent, while India continues to face a baseline tariff of only 10 per cent.

With rising export costs from many countries, multinationals will keep seeking alternative manufacturing hubs. This gives India another chance to expand its role in global goods trade — a crucial opportunity given that the domestic economy is slowing down. A surge in goods exports could lift overall GDP growth. The key question remains: Can Indian policymakers seize this moment? There are two important objectives here: Preserving or gaining market access and significantly increasing the share of exports in global manufacturing trade.

Ideally, India would secure a favourable trade deal with the US, giving it a strong edge over competitors. If not, it can still benefit from lower tariffs compared to what other countries are facing now. And regardless of US outcomes, India has the rest of the world to trade with. Progress with the UK and potential talks with the EU offer opportunities. Beyond this, India must integrate into global supply chains through agreements with China and the Association of Southeast Asian Nations, and revive bilateral investment treaties to boost foreign direct investment (FDI) inflows.

Indian policymakers must make manufacturing far more attractive to foreign investors and implement key reforms to ease business hurdles. Despite efforts like Make in India (2014) and the production-linked incentive scheme (2020), manufacturing's share of GDP has stayed flat at around 17 per cent. Private investment remains weak, and FDI inflows — despite the China+1 trend — fell to just 2.3 per cent of capital formation in 2024, down from 8.8 per cent in 2020.

This shows that subsidies alone cannot overcome the bureaucratic and regulatory hurdles firms face. Policymakers must simplify and reduce costs for manufacturers — making it easier to acquire land, hire workers, get approvals from ministries, and import raw materials without excessive barriers.

Firms — foreign or domestic — invest more when returns are high and risks are low. In India, however, policy risks remain high due to unpredictable moves like retrospective taxes, increased tariffs, import restrictions, and sudden regulations. To attract investment, India must create a stable, and predictable policy environment, ensure consistency across policies, and relax FDI rules. India also needs a clear, and credible trade policy that lowers tariffs, and removes arbitrary non-tariff barriers like the surge of quality control orders since 2014.

The US-led trade war has reshaped the global economy. Short-term growth may slow as countries adjust, but Indian policymakers must focus on the longterm. This is a key chance to grow India's share in global manufacturing. With the goal of becoming a developed nation by 2047, missing this opportunity would be costly.

The author is associate professor of economics, IGIDR, Mumbai

Stoicism and the American Dream

BOOK REVIEW

SANJEEV AHLUWALIA

What does it take to be within the top 0.1 per cent of the population who are exceptionally ambitious, like the author, a self-made capitalist-philanthropist? Following the precepts of Stoicism, an ancient Greek philosophy, which distinguishes emotion from reason, perception from facts, builds the soul, and guides daily actions is one way.

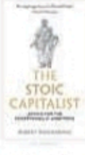
Stoicism lives on today as "Cognitive Behavioural Therapy" which changes maladjusted behaviour by altering negative perceptions and examines emotional responses rationally to deal with immediate needs. This book adopts an attractive narrative in the Stoic tradition of voicing principles as catchy, easily memorised aphorisms (disguised here as 42 chapters, some just two pages long) to guide real life actions.

Your parents can only afford underserved city schools. Work hard and excel, your teachers will bail you out and manage scholarships for you as the author's teacher did. You are poor and have no family role model. Read biographies in public libraries and choose your role model. Identify real life role models. The author did this at age 13 to cull inside information from brokerage employees, piquing their curiosity enough to share tips on when to buy and sell, thereby saving his family from certain loss in a "pump and dump scheme."

You face prejudice, as the author did at Yale. So what? A stoic adapts to what she cannot control (the reactions of others). Jews have assimilated for millennia. Years later the author extends his assimilation strategy by marrying a Christian, art historian and curator — his muse — to complement his yen for antique Chinese art acquisitions, which provide him a sense of refined contentment whilst also being profitable. The author has a yen for contrarianism — he is an American capitalist advising that America "give China face" by acknowledging its manufacturing expertise, technological smarts and extended imperial history.

On the choice of profession. Study law to refine your mind but do not practise law. You make more money in financial markets. It is cheaper to hire the best lawyers. Consider that between 1965 and 2023, the starting salaries for top Harvard Law School graduates increased 28 times, Law school fees increased 31 times, the rent for a one-bedroom apartment off Park Avenue increased 30 times. Second piece of advice. Work to learn your trade inside out. Once done, establish your own company. For a lawyer or a broker working in a firm, a salary would be a fraction of the customer billing. As a young lawyer, the author's billing was $500 for a $6 million tax saving by the client.

On how to buy profitable stocks. Study success closely. Choose firms in low competition areas. Understand the trend in tax laws — regulatory changes feed strongly into profitability. Become a protégé of an investment idol as the author was for Leon Levy, an unorthodox Wall Streeter at Oppenheimer & Co who preferred to learn rather than stand on protocol, preferring reporters to editors in a newspaper, a chief economist to the president at a bank. These earthy encounters gave him unusual insights for believing, with Hyman Minsky, that credit policy did more to create bull markets and crashes than the economic dogma of cyclical movements being a consequence of prices moving towards a stable equilibrium.



The stoic capitalist: Advice for the exceptionally ambitious
by Robert Rosenkranz
Published by Bloomsbury Business
262 pages ₹499

Having a diversified set of friends helps. The author shared an admiration for Ayn Rand with Charles H Brunie, one of the four partners at Oppenheimer. In turn Charles was friends with Alan Greenspan and Milton Friedman — who Charles and the author believe, held the key to accelerated American growth as opposed to classical Keynesianism, which sparked a decade of inflation and low growth by 1980. Mike Milken — the junk bond king who earned $550 million in 1987 — was another, who upended the staid bond market rigidly regulated by ratings from Moody's or S&P. He conceived a high-interest rate market for below investment grade bonds, to finance newcomers, who *sans* ratings, were unable to get debt finance to mount hostile takeovers of established, but poorly run companies, thereby perpetuating inefficient capitalism.

For the wealthy, his advice is to be prepared for death with a tightly drafted will. His first wife couldn't care less who benefitted from her estate, even if it devolved to the government by default — a shocking case of voluntary double taxation for a capitalist who earned every bit of his after-tax fortune.

The author believes reason, not blind faith, must dictate actions. Stoics value time and calmly accept death as inevitable. Medical science has extended life spans and is extending the "wellness span." The author's philanthropy funds wellness span extension research, which could potentially make human life near perpetual, devaluing time and upending Stoic precepts. Undeterred, he benefits from anti-ageing research to reduce memory loss, ski better and play a meaner game of singles tennis, thereby marrying selfish capitalistic philanthropy with Stoic precepts of not wasting even a second. If you are at an inflection point — a student starting work, looking for a career change, stuck in a midlife crisis or suffering from retirement blues, do not miss reading this book. You might not end up a billionaire, but you might be happier without being one.

The reviewer is a distinguished fellow, Chintan Research Foundation, and a former IAS officer and World Bank official

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'After obesity, GLP-1 research focused on Alzheimer's... hypothesis centres on its ability to reduce inflammation in brain... this is different from current approaches'

Danish scientist Lotte Bjerre Knudsen is co-inventor of the first long-acting GLP-1 receptor agonist approved for the treatment of type 2 diabetes and obesity. Last year, she, along with Joel Habener of Harvard Medical School and Rockefeller University biochemist Svetlana Mojsov, received the prestigious Lasker~DeBakey Clinical Medical Research Award for the discovery and development of GLP-1-based drugs, which have revolutionised the treatment of obesity. Knudsen spoke to **KAUNAIN SHERIFF M** about her three-decade journey of research, and what lies ahead for GLP-1 drugs

EXPLAINED INTERVIEW

LOTTE BJERRE KNUDSEN

What is GLP-1? What does it do in the body, and why has it become such a powerful tool in treating diabetes and obesity?

GLP-1 is both an incretin hormone and a neurotransmitter. In physiology, it is secreted from the small intestine and from the hindbrain after we eat a meal. It travels to the pancreas, where it helps to regulate our blood sugar by increasing insulin and decreasing glucagon. This is what we call the incretin effect. This effect is blood glucose-dependent, meaning it is only if the blood glucose is elevated that it has an effect here.

GLP-1 also impacts centres in the brain associated with control of hunger and satiety, to effectively tell us that we have had enough to eat and need to stop eating.

There are receptors that GLP-1 binds to in many organs in the body, and GLP-1 also has beneficial effects in many of these organs, such as the kidney, liver, and cardiovascular system. GLP-1's effects in the pancreas and brain are the important ones to help control blood glucose and body weight.

> The big 'hurray' moment came when we finally solved the biggest problem with GLP-1: in its natural form, it is incredibly short-acting — just about 2 minutes And now we have been able to extend that to up to 160 hours

When did the idea first come up that GLP-1 could actually be turned into a drug? Was there a moment, in the lab, or in a conversation, that made you think this could really work?

The biology of GLP-1 was always a good one. It might have started with the knowledge around its potential in diabetes — not just through incretin effects, but also involving glucagon and the fact that it's glucose-dependent.

Almost at the same time — going back to around 1990 — there was a growing realisation that GLP-1 had significant activity in the brain as well. So, the early thinking around GLP-1's potential in obesity actually emerged around that time.

Fast forward a few years, and we also began to understand its effects on the cardiovascular system. The biology was there — and it kept unfolding into more and more interesting areas. But the real challenge in the early years was druggability (the ability of a protein to bind a modulator and produce a desired therapeutic effect).

When I started working on GLP-1 in the early 1990s, I actually worked on three projects that failed before landing on the one that finally succeeded. We went through a lot of learning and had three different projects before the one that turned out to work.

Eventually, I started looking around — in our environment, in ongoing company efforts — and got this idea around using fatty acids. That approach was being explored in the company, but it was completely unproven at the time. Still, I decided to give it a try.

That led to the first molecule we got registered — for the treatment of diabetes in 2009, and for obesity in 2014. From there, we kept refining the approach and developing better molecules. It's been a 25-year journey — translating from lab to clinic, going back to the lab, then forward again — to get where we are today.

The big "hurray" moment came when we finally solved the biggest problem with GLP-1: in its natural form, it's incredibly short-acting — just about two minutes. And now, we've been able to extend that to up to 160 hours.

You mentioned that the idea of using fatty acids was unproven at the time but ended up being a breakthrough. Why fatty acids, specifically? What made you think they could solve the druggability challenge with GLP-1?

The reason natural GLP-1 is so short-lived is that it is chopped up by metabolic enzymes known as DPP-4 and cleared by the kidneys.

The technique we use is called fatty acid acylation. We have pioneered that, but nowadays it is much more widely used.

The basic concept is that you attach a fatty acid to your drug molecule, in this case, GLP-1. That will allow the drug to bind to a natural protein called albumin via the fatty acid. Albumin is a protein that plays a crucial role in transporting various substances throughout the body, including fatty acids.

By attaching to albumin, you protect the drug from degradation, from being cleared by the kidneys, and ensure that it reaches the GLP-1 receptors that are present in various organs throughout the body. We already had some experience with exploring this fatty-acid acylation technology, and I felt confident that we could also leverage the technology to solve the druggability problem of GLP-1.

Extending GLP-1 activity from just two minutes to up to 160 hours is a huge leap — what does that mean in terms of how the drug works in the body and its impact on patients?

A lot of things need to happen after we eat. Something needs to happen in our pancreas to help regulate blood sugar, something needs to happen in our brain to tell us to stop eating, and so on. GLP-1 plays an important role in that, although it is not the only hormone involved in those processes.

But in physiology, GLP-1 works for just a few minutes, so after you eat a meal and GLP-1 is secreted naturally, it gives an immediate effect that lasts maybe 30 minutes.

By creating a GLP-1 analogue that works for 24 hours a day, whether it is given once daily or once weekly, we ensure that there is a sustained effect.

So, if you have type 2 diabetes, it helps you to regulate your blood sugar 24 hours a day. If you have obesity, it helps you to control your hunger and what you eat throughout the day. If you are at risk of cardiovascular disease, it consistently helps dampen inflammation, and lowers blood pressure and some blood lipids.

And these diseases often overlap, so for many people several of the effects of GLP-1 will be beneficial.

What were some of the toughest moments of the 25-year journey? Was there a day, a result, or a conversation when it really hit you — that you'd done it?

Not really — because there was always a way forward. When you make medicines, it takes time. You have to solve a lot of problems. There are multiple tasks: there's the invention, there's the specific molecule, then you have to figure out how to manufacture it, how to design a clinical program, a toxicology program. You might encounter unexpected issues, and you have to solve them.

So, I don't recall [any] single day where I thought, "oh my God, we've done it". Of course, the process comes with a lot of challenges, but that's just how it is when you're making medicines — especially when you're proposing something entirely new. Naturally, there are going to be even more hurdles.

We were the first ones to solve the druggability problem for GLP-1. We were the first to have it approved for obesity in 2014 — at a time when no one else was working on that. We were also the first to apply for a cardiovascular indication for GLP-1 in 2016, and we are still the only ones to have conducted a kidney outcome trial. We were the first to explore liver outcomes, and we're currently the only ones testing GLP-1 in Alzheimer's disease.

Semaglutide was designed for type 2 diabetes, but it ended up transforming weight loss treatments too — something few people saw coming. When did that shift begin for you?

Actually, that's not true in our case, though it may be true for other companies. We developed it for both diabetes and obesity at the same time. We conducted our first clinical trial with weight loss as the primary endpoint back in 2001.

Because we had that dual focus, we ended up learning that you actually get more weight loss in people without diabetes. In fact, you get about twice as much weight loss in people without diabetes compared to those with diabetes.

And if we hadn't done that, I don't think GLP-1 would have ever been developed for obesity. If people had only looked at the diabetes clinical trials, they would've seen weight loss of just 2–3 kilograms — which isn't all that compelling. It's helpful, of course, especially compared to weight gain, but it's nowhere near enough to get approval for the treatment of obesity.

So it's not true that semaglutide was developed primarily for diabetes. It is true that it was first approved for diabetes, but the obesity trials followed just a few years behind.

And because of that early focus — and the 20 years we've spent talking with physicians about obesity — we were in a position to design the SELECT trial as far back as 2015. That was when we started recognizing the independent effects of GLP-1 on inflammation, which is a key mechanism in cardiovascular disease.

This trial is truly a landmark. No one had ever shown that pharmacologically induced weight loss could also deliver a cardiovascular benefit — and that has only been demonstrated with semaglutide.

Why is this a landmark?

It is a landmark because it was completely novel. It's also a landmark because it has changed the way we view the treatment of obesity. It's not just about weight loss — it's about cardiovascular benefits. The fact that fewer people are actually dying, fewer people are having heart attacks, and fewer people are experiencing strokes makes a profound difference.

It has also changed the perception of the disease itself. Now we know that you can not only lower a person's body weight, but you can do it in a way that is fundamentally different from what we had before — where many older obesity medications actually increased cardiovascular risk or carried psychiatric or suicidal side effects.

That's why it's a landmark trial.

> GLP-1 was a landmark because it changed the way we view treatment of obesity... The fact that fewer people are actually dying, fewer people are having heart attacks, fewer people are experiencing strokes makes a profound difference

The emergence of GLP-1 has shown that the brain and gut are intertwined. In fact, we hear that "the gut is the new brain". Your thoughts?

I would phrase it a bit differently, because I'm a pharmacologist. People often talk about the gut-brain axis, and I see that more as a physiological concept. For me, GLP-1 has effects on many different organs.

In physiology, GLP-1 is secreted from the gut or the hindbrain. In that context, you see small peaks in GLP-1. What we do in pharmacology is create steady-state, high levels of GLP-1 — and that affects various organs. It works on the pancreas to treat diabetes; it acts on the brain to help people feel more satiated, less hungry, and change how they eat; it works on the gut to reduce inflammation; it also has effects on the heart, kidneys, and other areas of the brain.

So, I see it more as a multi-organ effect — not just a gut–brain connection. We now understand how it impacts various organs in healthy, beneficial ways.

Where does the GLP-1 research go from here? Especially with respect to Alzheimer's?

With GLP-1, the current focus is on Alzheimer's disease. Our realisation, after thinking about this for quite some years, was that we needed to conduct large trials in order to prove whether it actually works. That's what we're doing now, and we should have those results in the second half of this year.

Until then, it's really difficult to say anything definitive because doing trials in Alzheimer's disease is extremely challenging. There has been very little progress for decades, so this is a completely new concept in Alzheimer's research.

We have to be patient for a little longer to see if it actually works. Our hypothesis centres around some of the other effects GLP-1 has on the brain, particularly its ability to reduce inflammation. That's a mechanism that hasn't been fully explored in Alzheimer's. It's very different from the traditional approaches of targeting amyloid (proteins that form plaques in the brain and affect neuron function and lead to cognitive decline) and tau (protein that disrupts the neuron's internal transport system and impacts communication between cells). What we're doing is exploring the metabolic impact of GLP-1 in people with Alzheimer's.

What is the scientific hypothesis behind GLP-1's role in brain diseases? How might it actually be working in the brain?

The central hypothesis is inflammation in the brain. Inflammation is one of the earliest processes involved in many diseases. At the tissue level, things begin to change, triggered by different pathological stimuli — whether from genetics, the environment, or other factors. It's often one of the first signs that cells are sensing something is wrong.

You see similar patterns in other conditions. In diabetes, for example, the pancreas doesn't function properly. In people with obesity, certain neurons become imbalanced, which can affect behaviour, like eating more or making less healthy food choices. In neurological diseases, inflammation in brain cells leads to imbalances in how those cells function.

That's where GLP-1 comes in. The idea is to see whether GLP-1 can help correct that imbalance. It acts on many different pathways, and we know there are GLP-1 receptors throughout the brain. These receptors — which are the molecular targets GLP-1 binds to — give us a way to influence brain function at a cellular level.

At this juncture, what do we know — and don't know — about the long-term side effects of GLP-1 treatments?

It is important to say that there can be side effects with all medicines. This is prescription-only medicine, and the decision to start using a prescription medicine should always be made in close consultation with your doctor.

For all GLP-1 receptor agonists, the most common adverse events are gastrointestinal, and usually mild to moderate and transient in nature.

But GLP-1 is a very well-described class of medicine. GLP-1 medicines have been used to treat type 2 diabetes for about 20 years, and for the treatment of obesity for about 10 years. Our first GLP-1 receptor agonist for type 2 diabetes was launched 15 years ago.

Semaglutide has been studied in robust clinical development programs where more than 52,000 people have received it, and millions of people have used these products in the real world.

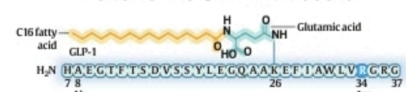
Lotte Bjerre Knudsen is Chief Scientific Adviser for Research at Danish pharma giant Novo Nordisk, and the driving force behind the company's research and development in the GLP-1 receptor agonist space for more than 30 years. ***Kaunain Sheriff M*** *is National Health Editor at The Indian Express*

HOW GLP-1 DRUGS WORK

GLUCAGON-LIKE PEPTIDE 1 (GLP-1) is a naturally occurring peptide hormone — water-soluble molecules ranging from a few to 200 amino acids in length — that regulates blood sugar and appetite.

TO LAST LONGER in the body, GLP-1 is attached to fatty acids, which help the drug stick to a blood protein (albumin), which (i) carries it around the body, and (ii) protects it from being broken down too quickly.

LONG ACTING GLP-1 ANALOGUES

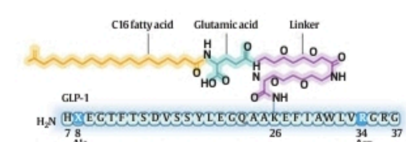


LIRAGLUTIDE

USES A 16-carbon fatty acid.

FATTY ACID is attached to GLP-1 through a small part called glutamic acid (*see figure above*).

IT IS TAKEN once a day as a shot under the skin.



SEMAGLUTIDE

USES AN 18-carbon fatty acid.

A LINKER, or extra connecting piece, is added between the GLP-1 and the fatty acid.

ONE PART of GLP-1 (alanine) is replaced by another amino acid (Aib) to protect it from being broken down by an enzyme called DPP-4.

LASTS LONGER, so it is taken once a week as an injection.

TO MAKE SURE THE DRUG WORKS PROPERLY

- **AT POSITION 34** in the GLP-1 chain, lysine (K) is replaced by arginine (R).
- **THIS LEAVES** only one lysine (at position 26), so the fatty acid attaches in the right place.

EXPLAINED LAW

How Denmark plans to use copyright law to protect against deepfakes

AMAAL SHEIKH
NEW DELHI, JULY 14

IN WHAT is a pioneering effort to tackle the rise of deepfake content, now ubiquitous across the Internet, Denmark has proposed extending copyright protections to individuals' facial features, appearance, and voice.

The proposed amendment to Denmark's copyright law will effectively make it illegal to share deepfake content of another person without their consent, empowering individuals to get such forgeries taken down from online platforms, and seek compensation for their publication — similar to how copyright laws traditionally protect creative works.

Rise of deepfakes

Deepfakes are a form of synthetic media which depict believable and realistic videos, pictures, or audio of events that never happened — they show real people doing or saying things that they never did or said.

While media has long been manipulated for nefarious purposes, artificial intelligence has made such manipulation easier and more sophisticated than ever before. The volume of deepfake content online has risen dramatically in recent years, and deepfakes have become increasingly difficult to spot.

Authorities around the world have struggled to catch up with the technology which has been used to create pornographic content, spread misinformation, and pull off sophisticated con jobs.

Most existing laws dealing with deepfakes criminalise specific harms arising out of the technology, such as deepfake porn or the publication of manipulated media during elections. The Danish Bill, introduced last month and currently in the consultation stage, is harm-agnostic in that it directly addresses the publication of deepfakes and not specific harms they may cause.

Danish culture minister Jakob Engel-Schmid said the Bill gives people "the right to your own voice, your own facial features, and no one can copy that without your consent".

What the Bill proposes

The Bill introduces three new forms of protection against deepfakes:

- Imitation protection, which bars others from publicly sharing realistic digital recreations of a person's physical traits, like facial features and voice;
- Performance protection, that covers artistic performances such as non-verbal or improvised acts that may not meet the usual copyright thresholds; and
- Protection for performing artists, specifically targeting digital mimicry of musicians, actors, performers, etc.

The most notable here is the protection extended to ordinary individuals. The proposed Section 73(a) makes it illegal to share realistic deepfakes mimicking a person's appearance, voice, or characteristics for up to 50 years after their death.

The operative word here is "realistic". The Bill does not bother about intent— any deepfake can be taken down as long as it looks real and creates confusion. At the same time, content that is clearly stylised is not protected.

The Bill proposes a kind of consent-based protection: deepfake content can only be shared with the permission of the individual impersonated in it. It is the responsibility of the person sharing the content to prove that consent was obtained, and this consent can also be withdrawn at any time.

The Bill also makes online platforms responsible for taking down deep fakes, and proposes heavy penalties if they fail to do so.

Caveats & limitations

Protections offered by the Bill only extended to content in the public sphere: the Bill does not make it illegal to generate deepfakes but simply bars their publication.

Certain forms of expressions, such as satire or parody, remain outside the Bill's protections, although the Bill does not grant blanket exemptions. Civil courts will decide what content to take down on a case-to-case basis, based on protections for free expressions provided in the European Convention of Human Rights.

While ambitious and potentially agenda-setting, especially in the light of Denmark's presidency of the European Union, critics say implementing such a law will be challenging. The law's mandate is restricted to Danish territory, making it impossible to prosecute wrongdoers operating elsewhere in the world.

"Denmark may be granting a new right, but if the mechanisms to enforce it are slow, burdensome or inconsistent, the real-world impact could be minimal," Francesco Cavalli, chief operating officer of Sensity AI, a company that offers deepfake detection tools, told *The NYT*. "Regulation without enforcement is a signal, not a shield," he said.

At the same time, many are looking at the Danish example as a blueprint for other countries, many of which do not have standalone legislation to address digital impersonation at the moment.

Indian courts have thus far resorted to concepts of privacy, defamation, and publicity rights when dealing with deepfakes. Notably, the Delhi High Court extended protections against unauthorised use of their likenesses to actors Amitabh Bachchan in 2022 and Anil Kapoor in 2023. The rulings however looked at these figures specifically as celebrities.

The Danish Bill extends similar protections to ordinary citizens.

THE IDEAS PAGE

WHAT THE OTHERS SAY

"The one-China principle is the foundation and prerequisite for both China-Australia and China-Japan relations. The Pentagon has no authority to hijack other countries with the Taiwan question."

— GLOBAL TIMES, CHINA

It does not stop in Bihar

Dangers of SIR exercise are much larger — at stake is the foundational principle of universal adult franchise

DESHKAAL

BY YOGENDRA YADAV

C R Sasikumar

WHILE THE RELIEF signalled by the Supreme Court in its hearing on the Special Intensive Revision (SIR) of electoral rolls in Bihar can only be welcomed, it carries a serious risk of distracting us from the real issue. Our focus may be diverted to the inclusion of Aadhaar, on revising the impossible timelines of this exercise and on the ground reality in Bihar. All these are real and pressing issues. But exclusive attention to them can cloud the fundamental issue, of significance for the entire country, and indeed for the future of the Indian republic. Unless they are vigilant, opponents of the SIR (including this author) run the risk of winning a battle only to lose the war.

Let us not forget what is at stake here. The SIR is not limited to Bihar. Bihar is just a pilot. As this paper has reported ('After Bihar, EC writes to remaining states to prepare for intensive roll revision, qualifying date set', July 13), the ECI has directed that preparations for the exercise begin in the rest of the country, even as the Supreme Court is examining its legality. This is not a revision of the voters' list — it is a *de novo* compilation of the list. It is, in fact, a rewriting of the rules, procedures and protocols of how the voter list is to be created. At stake here is the foundational principle of universal adult franchise. No matter what relief we obtain in Bihar, unless the entire exercise is annulled, we stand to lose the universality of the franchise.

Universal adult franchise was among the core principles of our freedom struggle, formulated in the Motilal Nehru Committee Report of 1928 and reiterated in the declaration of Purna Swaraj in 1929 and thereafter. The Constitution of India incorporated the principle of "adult suffrage" in Article 326 by stipulating that "every person who is a citizen of India and who is not less than twenty-one years of age … shall be entitled to be registered as a voter". Article 5 specifies that Indian citizenship shall be based on birth and residence (not on descent or ethnicity etc). Article 10 protects a citizen against loss of citizenship status by providing for presumption of continuity: "Every person who is or is deemed to be a citizen of India" continues to be so.

In the first 75 years, the Republic of India followed the "logic of encompassment" in realising this constitutional promise. As Anupama Roy argues in her book Mapping Citizenship in India, the logic of encompassment involved a move towards true universalisation and recognition of all differences so as to extend citizenship status to everyone. There was also, no doubt, the contrary "logic of closure" at work — of denial, suspicion and exclusion — especially against migrant workers, who continued to be "residual citizens". But that logic was never extended to the denial of voting rights. Hence the now-accepted argument in the book *Why India Votes?* by anthropologist Mukulika Banerjee: The secular ritual of voting has acquired something of a sacrosanct status in India.

This did not happen by accident. The logic of encompassment was embodied in laws, rules and institutional practices, all aimed at ensuring that no voter was left behind. First, unlike the US and other countries that require every eligible person to apply to register as a voter, the Indian system placed the responsibility of enrolling each eligible voter on the state. The result: only 74 per cent of adults made it to the voters' list in the US, while it was 96 per cent in India. While individuals can apply for inclusion in the electoral roll, the principal responsibility lies with election officials (now the BLO and the ERO) to contact every adult resident and make sure that no eligible voter is left behind. Second, there is a presumption of citizenship: Every person who appears to be an adult and resides in the locality is presumed to be a citizen and put on the electoral roll unless there are good grounds to suspect otherwise or there is a complaint. Once on the voters' list, a name cannot be removed without the proper process. Finally, as Ornit Shani's celebrated history *How India Became Democratic* shows, the making of universal franchise required the ECI to take unusual steps. Over the years, the ECI has gone out of its way to evolve protocols for the inclusion of "liminal" citizens who may have been left out in any routine, bureaucratic exercise: Nomadic communities, homeless persons, sex workers, transgender persons, orphans, undocumented citizens and non-resident Indians.

The SIR seeks to reverse the logic of encompassment. It seeks to formalise the logic of closure that would result in graded inequality of citizenship. For the first 75 years, the Indian state failed to convert the promise of "free and equal membership of a political community" — to recall the favourite words of T H Marshall — from the formal political sphere to a substantive social sphere. As Niraja Gopal Jayal has argued so perceptively in *Citizenship Imperilled: India's Fragile Democracy*, we are witnessing "major reconfigurations of citizenship" that would result in "not the realisation of substantive citizenship but in fact a substantive erosion of even formal citizenship".

The current exercise completes this reversal through multiple, simultaneous moves under the innocuous neologism of "Special Intensive Revision" of electoral rolls. While it pretends to implement Article 326 of the Constitution, it twists the constitutional intent by disregarding the presumption of continuing citizenship. It is another subtle step in what Jayal identifies as the transition from the *jus soli* principle of citizenship based on birth and residence to the *jus sanguinis* principle of citizenship based on descent, ethnicity or religion.

> For the first time, all potential voters, with no exception, have been asked to fill out an enumeration form. Otherwise, they don't even figure on the draft electoral rolls. Their being on the voters' list so far is of no consequence, unless they figured on the electoral rolls of 2003. (There is nothing to justify 2003 as a cut-off point, as that exercise did not involve any physical or documentary verification of citizenship status). Second, the presumption of citizenship has been overturned. Now you need to prove that you are not an illegal resident. Finally, it seeks to legalise arbitrariness through the absurd provision of an 'indicative (though not exhaustive)' list of documents, which can be changed at the discretion of any local official.

The SIR reverses the practices that have ensured the operationalisation of universal adult franchise in India. First, the onus of being on the voters' list has been shifted to the eligible voters. For the first time, all potential voters, with no exception, have been asked to fill out an enumeration form. Otherwise, they don't even figure on the draft electoral rolls. Their being on the voters' list so far is of no consequence, unless they figured on the electoral rolls of 2003. (There is nothing to justify 2003 as a cut-off point, as that exercise did not involve any physical or documentary verification of citizenship status). Second, the presumption of citizenship has been overturned. Now you need to prove that you are not an illegal resident. For the first time, everyone carries the burden of offering documents (either a copy of the 2003 voters' list or proof of birth and residence) that have never been provided to them, and that a majority has no reason to possess. Finally, it seeks to legalise arbitrariness through the absurd provision of an "indicative (though not exhaustive)" list of documents, which can be changed at the discretion of any local official.

In the past few days, the media has finally taken note of the chaos, the tragedy and the farce that the SIR is unfolding in Bihar. Powerful and relevant as these stories are, they must not distract us from the basic design underlying the exercise. The real problem is not just inefficiency and unfairness in operationalising the SIR. The very scheme is malevolent, anti-constitutional and anti-democratic. It must be scrapped.

The writer is member, Swaraj India, and national convenor of Bharat Jodo Abhiyaan. He has filed a petition in the Supreme Court challenging the SIR

When the sound of politics is shrill

Apocalyptic politics is an abdication of democratic humility, and of the responsibility to negotiate a middle ground in a country of great diversities

VANDITA MISHRA

OVER THE LAST few days, the news from two states, positioned at opposite ends of the spectrum — Maharashtra ranks among India's most industrialised states, while Bihar remains one of the least developed — has sounded similarly dire.

In Maharashtra, there have been incidents of violence on the language issue after a government circular sought to make Hindi mandatory in primary schools. It was rolled back subsequently, but not before it created space for estranged Sena cousins Uddhav and Raj Thackeray to re-unite and pose as "saviours" of the supposedly re-endangered "Marathi Manoos". Meanwhile, the Devendra Fadnavis dispensation has passed a law that paints an alarmist picture of a state overrun by "urban Naxals".

The Maharashtra Special Public Security Bill uses cloudy language and extra-large definitions as it purports to, as CM Fadnavis said in the Assembly, rescue the state's youth from those "provoking people for armed revolt to demolish democracy, Parliament and institutions". The bill has rightly raised apprehensions about the government using the law to criminalise dissent. The new law will be in line with Fadnavis's remarks earlier on the Maharashtra polls, which tarred and demonised the entire Opposition: The election was a contest, he said, not between parties, but between "forces of nationalism" and "forces of anarchy".

In Bihar, in a controversial departure from the past, the Election Commission's exercise for updating and cleaning up electoral rolls, the ongoing Special Intensive Revision, casts the onus on large swathes of undocumented voters to prove their citizenship, sparking legitimate and widespread fears of disenfranchisement. At the same time, a spate of incidents of murder in the state have made "law and order" a talking point again, at least among the politicians, including one prominent ally of the ruling BJP.

Whether or not Bihar sees a revival of the nasty and brutish motif of "jungle raj" — this time, in a role reversal, with the RJD using it to hit back at the JD(U)-BJP — combined with the very real voter anxieties stirred by the EC, the ground is fertile for an apocalyptic clamour ahead of a crucial election.

What is common to Maharashtra and Bihar is a politics that makes fear its currency, and in which simple solutions are presented to complex challenges. These feature zero-sum games and us-versus-them scenarios, which demonise the opponent and create conditions that are ripe for "saviours", draconian laws and the strong-armed state. The rhetoric of apocalypse is a conversation cul-de-sac, a dead-end for democratic debate.

In Maharashtra, therefore, the Thackerays raising the pitch on the language issue and the Fadnavis government arming itself with wider powers threatens civil liberties and narrows the space for a policy and politics that aims at re-energising the state's growth momentum. In Bihar, the costs of an apocalyptic politics around "law and order" and "disenfranchisement" — as legitimate as the concerns are about the modalities and consequences of the EC's exercise — are higher.

For all its hard-won accomplishments, Bihar's turnaround story, scripted and steered by Nitish Kumar for two decades, has hit a long plateau, and Nitish himself is a waning presence. The state desperately needs a sober search for ideas on the way forward.

It's not just Maharashtra and Bihar. A politics that trades on spectres and scenarios of the end of the world as we know it, and fantasies of rebuilding on a wiped out slate, no matter what it takes, is in fashion. At the Centre, the Narendra Modi-led BJP, even as it taps into the aspirations of a changing electorate, has excelled at framing stories of fall and rise.

Read between the lines, and in the Modi government's telling, any attempt to change requires destruction of the old order. The Congress-Left "ecosystem" must be felled and flattened, and New India must rise from the ashes of the old. It will be a country that is radically reconstituted and rearranged, with a grand temple in Ayodhya and without Article 370, with One Election, One Language, One Civil Code (and One Party, One Leader). The fantasy of total destruction and erasure of the old is intrinsic to the BJP's version of apocalyptic politics, and its vision of the new.

The politics of Modi's main challenger, Rahul Gandhi, is also apocalyptic, but an evocative or resonant vision of the new utopia seems to be missing in it. That is one reason why his war cries of "Constitution in danger" and "Democracy under siege" and his exhortations for rooting out the existing system, which he paints as irredeemably authoritarian and corrupt, haven't got much voter buy-in. Gandhi paints himself as a crusader, and raises the pitch, but falls short in offering a compelling or even clear vision of an alternative.

Despite their differences, however, the politics of both Modi and Gandhi does the same disservice: The painting of the apocalypse rules out a conversation with the political opponent, let alone treating them with respect and reciprocity. If the opponent is the enemy — in CM Fadnavis's language, a "force of anarchy" — anything goes, it would seem, in terms of how they can be treated.

At its core, apocalyptic politics is an abdication of democratic humility, and of the responsibility to explore and negotiate the middle ground in a country of great diversities. It sets the stage for conspiracy theories and conduct unconstrained by the rules of the game, one that does not abide by even the small and basic conventions and courtesies. It leads to deepening polarisation and a divided polity.

Of course, there can also be value in apocalyptic thinking — sociologists have pointed out that when used by environmentalists, or anti-nuclear activists, or the oppressed, it can help open up possibilities of a new and better world. But when deployed by the powerful, it ends up closing options.

It obscures the fact that there are multiple paths to reach goals, and many possibilities to tweak and change the system from within. It distracts attention from the difficult work of politics that is waiting to be taken up — beyond the all-or-nothing options that are being propagated.

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In Naim sahib, twain did meet

C M Naim straddled Eastern and Western literary conventions with acuity

MEHR A FAROOQI

LAST WEEK, A friend called to give me the sad news of Naim *sahib*'s passing. He had not been too well since suffering a stroke a couple of years ago. But after returning from rehab, his spirit was as indomitable as ever. He relished writing and wrote with zest: Sparkling essays, columns and a weekly, later monthly, newsletter that he dispatched electronically to a large following. Naim *sahib* did not shy away from technology. He had a website on which he posted stuff he liked. But the newsletter was his commentary on various subjects related to literature, including world politics that impacted literature. He wrote what was on his mind without mincing the truth. It was a privilege to be on his mailing list.

Choudhri Muhammad Naim (1935-2025) was a very dear friend of my father, (Urdu writer) Shamsur Rahman Faruqi. He would affectionately call him Choudhri but I always addressed him as Naim *sahib*, never Naim *chacha* or uncle, as is the common tradition in South Asian families. Perhaps this form of address was an instinctive nod to the fact that he lived in America, taught at the University of Chicago and had a "Western" air about him. But he always spoke chaste Urdu, never English. As a young girl, my interpretation of Western manners was not just his corduroy trousers and jacket but also his bluntness. If Naim *sahib* didn't like something, he would firmly say, "no". I admired him and kept a safe distance from him.

Naim *sahib* also carried a camera and would take pictures of us. In the India of the 1970s, a sleek camera was a luxury one often associated with foreigners. I still have the pictures he took of my parents and one of me with my father.

I remember my father looking forward to Naim *sahib*'s yearly visits to India. They would be engaged in discussions for hours on serious subjects but also find time to share life stories. I could hear the sounds of laughter floating from my father's study. He would joke about my father's obsession with work, advise him to relax and take up gardening. My father would be half-amused and half-annoyed at this. Only Naim *sahib* could chastise him. I have memories of his visits from my father's postings at Lucknow, Allahabad, Delhi and Patna. Lucknow was special because Naim *sahib* was from Barabanki, a town not far from there. He did his Master's in Urdu literature from Lucknow University in 1955, after which he joined the University of California, Berkeley, as a graduate student. He completed an MA in Linguistics from UC Berkeley in 1961. From 1968 until his retirement in 2001, he taught at the University of Chicago's Department of South Asian Languages and Civilisations; he served as its chairperson from 1985 to 1991.

When Naim *sahib* began teaching Urdu language and literature, there weren't many resources for teaching Urdu at universities. He had to improvise and find a methodology that would connect with his students. His style of teaching was very South Asian; that is, he criticised more than he praised. He pushed his students to higher levels of proficiency; sometimes, there were disappointments, at other times spectacular successes. His list of accomplishments is long and I am not going to go into the many programmes and university presses he served, but I must mention his enduring achievements — first as the co-founder of the pathbreaking *Mahfil: Journal of South Asian Literature* in 1965, and later, as the founding editor of Urdu's premier journal, The Journal of Urdu Studies. The journal began publication in 1981. He did great service in producing two textbooks of Urdu, *Readings in Urdu Prose and Poetry* (1965) and *Introductory Urdu* in two volumes (1999).

At Chicago, he produced several distinguished PhDs, among them the critic and scholar Frances W Pritchett. Scrolling through Pritchett's website on Naim *sahib* for his publications, one finds an impressive list of articles and translations. He did not have a taste for writing books/monographs but one of his enduring works is the stellar translation, with an introduction and notes, of Mir Taqi Mir's convoluted autobiography, *Zikr-e Mir* (1999).

When I moved to the US in 1998, I did not expect Naim *sahib* to gush over my arrival. On my father's insistence, I did call him a few times and he was concerned in a friendly way about how I would manage alone in a foreign place. He didn't offer any help by way of writing recommendation letters. Thus, I was surprised when I received a letter in the mail from him (I do wish I could find that letter now). In that letter, he told me that he had suggested my name to Oxford University Press to edit an anthology of modern Urdu literature. It had been offered to him, he said, but he wrote that in his opinion, after my father, I was the only person he could see accomplishing this huge task. I was floored. I accepted the job and went on to publish the two-volume anthology in 2008. That was a milestone in my academic career and I owe it to Naim *sahib*.

Choudhri Naim straddled Eastern and Western literary conventions with acuity. His passing leaves a huge void in Urdu studies.

The writer is professor, Department of Middle Eastern and South Asian Languages and Cultures, University of Virginia, US

LETTERS TO THE EDITOR

FUTURE OF FOOD

THIS REFERS TO the editorial, 'Lend a hand' (*IE*, July 14). The Green Revolution made India self-sufficient in food production. Today, India should give funds to the International Maize and Wheat Improvement Centre and International Rice Research Institute so that agriculture scientists develop varieties that give better yield but are also resistant to high temperature, water salinity, drought etc. As wheat and rice are staple foods in the Global South, an Indian contribution would enhance India's stature and help combat the challenges of climate change.

Atul Thakre, *Nagpur*

A DEADLIER WORLD

THIS REFERS TO the article, 'Proxies & missiles aren't enough' (*IE*, July 14). The way disruptive technologies are springing surprises in every field, modern warfare needs to adopt more hybrid strategies. At the same time, world leaders must realise that warfare is turning ultra-competitive and insensitive to the human suffering on both aggressor's and defender's sides. Overall, humans are devising newer and lethal methods of self-destruction. The whole world needs to reflect.

Manish Mishra, *Bhopal*

TRUE TO FAITH

THIS REFERS TO the article, 'From remembrance to resolve' (*IE*, July 14). Sikhism is a peaceful religion, and it is both misleading and offensive to associate acts of terrorism and mass violence with the Sikh faith. The term Sikh terrorists used in reference to the Air India Flight 182 incident by platforms like Wikipedia is an oxymoron. As rightly noted in the article, "Those promoting separatism in the name of Sikhism do not represent the spirit of the community… …." True followers of the Gurus are guided by the principles of *sewa*, not violence. Terrorism has no religion.

Aerika Singh, *Chandigarh*

WAKE-UP CALL

THIS REFERS TO the report, 'Pilot suicide insinuation reckless and unfounded, says ICPA (*IE*, July 14). The interim report by the AAIB prima facie apportions the blame to the pilots/human error. However, the conversation between the pilots is telling and the possibility of malfunction cannot be absolutely ruled out. Further, this incident is a wake-up call for airlines to earmark funds to ensure mental and psychological training for their employees.

Aanya Singhal, *Noida*

ABSTRACT

GETTY IMAGES

New study shows cysteine withdrawal causes rapid weight loss in mice

Diets that promote weight loss without compromising overall health are being rigorously studied and tested around the world. One such study found that removing just one amino acid, cysteine, from the diet of mice led to a dramatic loss of 30% of body weight in a week

Arun Panchapakesan

Varghese, A., Gusarov, I., Gamallo-Lana, B. et al, 'Unravelling cysteine-deficiency-associated rapid weight loss', *Nature* (2025). doi.org/10.1038/s41586-025-08996-y

In the 1930s, when scientists were beginning to uncover the molecular basis of nutrition, they already knew that proteins were a vital part of the diet, but they didn't fully understand why. More specifically, they didn't know whether all 20 amino acids, the building blocks of proteins, were equally important or if only some of them were crucial for human health.

This question was answered in 1937 by William Rose, who conducted a series of experiments in which he fed rats individual amino acids instead of whole proteins. By systematically omitting one amino acid at a time from the rats' diets, he was able to identify which ones were truly indispensable. These he called "essential" amino acids: they must be obtained through food because the body cannot produce them. The others, which the body can synthesise on its own, were deemed "non-essential".

The nine essential amino acids are histidine, isoleucine, leucine, lysine, methionine, phenylalanine, threonine, tryptophan, and valine.

Low-nutrition state

Rose's work was one of the founding pillars of modern nutrition science. Nearly a century later, as the world struggles with rising obesity rates, this knowledge has become more relevant. Diets that promote weight loss without compromising overall health are being rigorously studied and tested around the world.

One such study appeared in *Nature* on May 21, and it reported rather surprising results. The researchers found that removing just one amino acid, cysteine, from the diet of mice led to a dramatic and rapid loss of 30% of the body weight in a week. The results are surprising because cysteine is not an essential amino acid.

Multiple researchers have explored the effects of essential amino acid withdrawal on weight loss. The idea behind these studies is that when these amino acids are removed from the diet, the body's inability to synthesise them reduces protein synthesis. The body interprets this to mean it is in a low-nutrition state and triggers fat burning. The effect has been reported in mice after deprivation of leucine, Isoleucine, valine, tryptophan and phenylalanine.

Interestingly, the effect is also observed when two non-essential but important amino acids, methionine and cysteine, are withdrawn from the diet. Methionine and cysteine are the only two amino acids that contain sulphur. The reactive nature of sulphur allows these amino acids to play key roles in protein folding and function. However, despite their nutritional importance, studies in mice have demonstrated that methionine restriction improves lifespan and protects against metabolic diseases.

Challenging to study

Building on these findings, one study published in the *Journal of Nutrition, Health and Ageing* in 2023 showed that a diet with very small amounts of methionine and cysteine had a significant impact on weight loss in humans. The study reported no adverse effects of the diet on participants, suggesting that the results could be translated to humans.

However, several questions remained to be addressed. Chief among them was the role of cysteine itself on weight loss.

Studying cysteine withdrawal is challenging because it's a non-essential amino acid. Removing cysteine from the diet won't allow us to study the effects of its deficit because the body will simply make more. To circumvent this problem, the authors of the new *Nature* study genetically engineered mice so that they lacked the ability to produce cysteine naturally. This means, for these mice, cysteine is now an essential amino acid that must be obtained through their diet.

Profound effect

The authors proceeded to withdraw each of the nine essential amino acids and cysteine and methionine individually from their diet and observed the effects on metabolic health.

None of the essential amino acids or methionine had an effect as profound as the omission of cysteine: 30.6% loss of body weight in one week on average. The authors also noted that the lost weight was recovered when they restored cysteine in the diet. The finding indicates that cysteine rather than methionine is more important among the sulphur-containing amino acids.

The team also reported that the effect was observed only in genetically modified mice that couldn't make cysteine. In normal mice, cysteine restriction had no effect, since they didn't depend on their diets for access to cysteine.

Importantly, the authors found that despite its effects on weight loss, withdrawing cysteine from the diet had other side effects, such as higher oxidative stress – the build-up of harmful variants of oxygen – because cysteine is a critical precursor for glutathione, one of the body's main antioxidants.

Experts therefore advise caution. Dr. Jayashree Gopal, consultant endocrinologist at DiabEndoIndia, Chennai, said that while the paper is fascinating in terms of the diet's ability to convert white fat into brown fat, a marker of improved metabolic activity, it is still too early to translate the findings into clinical practice.

"Firstly, if you remove [cysteine], the body is going to anyway replenish it. Secondly, because it is part of a very potent antioxidant system, we should not be interfering with nature's balances until we know more about it. And third, we have to keep reiterating that the study is only done in genetically modified mice. Mouse physiology and human physiology are very, very different," she said. Still, she added a note of optimism, "To extrapolate from [the paper], it is a promising start. Maybe something may emerge from this 10 years down the line, but we are nowhere near that..."

Dr. Gopal's words echo a fundamental principle of science, one particularly relevant to the study: while the research is commendable for uncovering the nuanced role of a single amino acid in fat metabolism, it also underscores the reality that scientific progress is often incremental.

Arun Panchapakesan is an assistant professor at the Y.R. Gaitonde Centre for AIDS Research and Education, Chennai.

THE DAILY QUIZ

Please send in your answers to dailyquiz@thehindu.co.in

Test yourself on the life of the famous Dutch painter Rembrandt on his 419th birthday

V.V. Ramanan

QUESTION 1
In which well-known Dutch town was he born and what does his full name Rembrandt Harmenszoon van Rijn mean?

QUESTION 2
He signed his early works as RHL for his Latinate name Rembrandus Hermanni Leydensis. Which celebrated work is said to be the first painting in which he used the simple name signature 'Rembrandt'?

QUESTION 3
Which work painted in 1625 and now displayed in Musée des Beaux-Arts de Lyon, Lyon, is considered his first signed painting and also features him in the work?

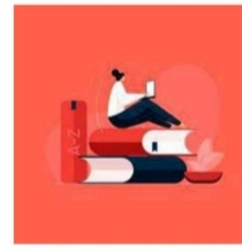
QUESTION 4
Which painting, set in a brooding chiaroscuro, shows the apostles reacting to the moment Jesus reveals his identity post-resurrection?

QUESTION 5
Where is the 'Christ in the Storm on the Sea of Galilee' painted in 1633 now located?

QUESTION 6
What is special about the 'The Next Rembrandt' that was unveiled in April 2016?

Visual question:
What is the popular or common name for this Rembrandt masterpiece and where is it displayed?

Questions and Answers to the previous day's daily quiz: 1. The original purpose of the Bastille fortress. **Ans: It was built as a fortress to defend the eastern entrance of Paris during the Hundred Years' War.**
2. This American founding father was present in Paris during the early years of the French Revolution. **Ans: Thomas Jefferson**
3. Number of prisoners held in the Bastille at the time it was stormed. **Ans: Seven**
4. The commander of the Bastille on the day it was stormed. **Ans: Bernard-René de Launay**
5. This newspaper editor was assassinated the day after Bastille Day's first anniversary. **Ans: Jean-Paul Marat**
Visual: The relationship of this solar flare with Bastille Day. **Ans: This solar flare occurred on France's national holiday in 2000, and has since been dubbed the Bastille Day Event**
Early Birds: C. Saravanan| Sunil Madhavan| Siddhartha Viswanathan| Tamal Biswas| Ravishankar Thyagarajan



FROM THE ARCHIVES

Know your English

K. Subrahmanian
S. Upendran

"Have you finished correcting my essay?"

"Yes, I have. It's on the table."

"Thanks. Good grief! There's red ink all over the page. Wait a minute, what's wrong with this sentence? 'My sister who is in college wants to become a lawyer'. There's nothing wrong with that, is there?"

"How many sisters do you have?"

"One! You know that!"

"I know that, but your other readers don't. And according to the sentence you have written, you have more than one sister."

"What? Where do I say that I have more than one sis...?"

"...just look at your sentence. 'My sister who is in college wants to become a lawyer'. The way you have written that sentence, it implies that you are talking about the sister in college and not the sister in school, or the sister in..."

"...wait a minute. What do I need to do to make it clear that I have only one sister?"

"You need to use commas. You need to say, 'My sister, who is in college, wants to become a lawyer'."

"Really? So, in this case, 'who is in college' gives you additional information about my only sister."

"Exactly! Even without 'who is in college' I would know who you are talking about. You are talking about your only sister."

"I see. So if I say, 'My brother, who is in Delhi, is an engineer', it means I have only one brother, right?"

"That's right. If on the other hand you say, 'My brother who is in Delhi is an engineer', it would mean you have more than one brother. And that it's your brother in Delhi who is the engineer and not the brother in Madras or Bombay."

"In that sentence, doesn't 'who is in Delhi' give you additional information about my brother?"

"It doesn't give me additional information about your brother. It gives me essential information. It tells me which brother you are talking about."

"That's interesting."

"Tell me what's the difference between, 'The students who went to the beach failed the exam' and 'The students, who went to the beach, failed the exam'?"

"Let's see. The sentence 'The students, who went to the beach, failed the exam' is like 'My brother, who is in Delhi, is an engineer'."

"Good. Keep going."

"I have one brother and he is in Delhi. So, in the sentence 'The students, who went to the beach, failed the exam' would mean – the students... all the students failed the exam. Is that right?"

"And what about 'The students who went to the beach failed the exam'?"

"Well, in that sentence 'who went to the beach' gives me essential information about the students. It tells me which students failed the exam."

"Exactly!"

"And in this case, only those students who went to the beach failed the exam. Not all the students failed, only those who went to the beach failed the exam. Am I correct?"

"One hundred per cent."

Published in The Hindu on April 1, 1997.

Word of the day

Pockmark:
a scar or pit on the skin that is left by a pustule of smallpox or acne or other eruptive disease

Usage: *Her face was pockmarked by acne.*

Pronunciation: newsth.live/pockmarkpro

International Phonetic Alphabet: /pɒkmɑːk/

For feedback and suggestions for Text & Context, please write to letters@thehindu.co.in with the subject 'Text & Context'

Scientists find pheromone that causes locusts to swarm and a way to block it

In a new proof of concept, researchers from the Institute of Zoology at the Chinese Academy of Sciences in Beijing have shown that it's possible to manipulate pheromones released by locusts to prevent them from swarming or engaging in group behaviour that leads to the feeding frenzy

Sandhya Ramesh

Human societies have struggled to fend off locust infestations for millennia. The insects' destructive effects persist to this day, especially when they collect in large swarms and eat through thousands of hectares of crops in a matter of days. Such swarms have occurred once every few years of late. Most recently, in 2019-2020, a record number of locusts emerged in East Africa and eventually passed through Pakistan and India, making it the region's worst infestation in 25 years.

In the last century or so, experts and farmers have tried to control locusts using synthetic pesticides, but unfortunately they also damage the land, food security, and the environment. Thus finding suitable, eco-friendly alternatives to pesticides has been an active area of research.

In a new proof of concept, researchers from the Institute of Zoology at the Chinese Academy of Sciences in Beijing, have shown that it's possible to manipulate pheromones released by locusts to prevent them from swarming or engaging in group behaviour that leads to the feeding frenzy. The team was able to identify the pheromone responsible for triggering swarming and also tested a candidate molecule to block its function.

The study, published in *Nature* on June 25, also recommended more research to identify other molecules that can safely keep locusts from swarming, including at large scales. Overall, the study offers potentially one of the earliest pollution-free solutions for locust control.

The UN Food and Agriculture Organization has estimated that 1 sq. km of swarming locusts, numbering about 40 million, can eat as much in a day as 35,000 people. GETTY IMAGES

Jiving to jump

Several animal, bird, and insect species – including locusts – exhibit a social behaviour called gregariousness: it helps them form societies in which large numbers of individuals work together, instead of competing, in order to survive. In the first phase of their lives, individual locusts are solitary creatures; then they transition to their gregarious phase and begin to collect and operate in physical groups, including feeding together.

Scientists have sought to identify the hormones that trigger this behaviour for many decades now. In fact the same team behind the new study had identified a pheromone of interest, called 4-vinylanisole (4VA), in 2020.

After a locust eats food, it often emits large quantities of 4VA from its hind legs. This hormone is an aggregation pheromone: it promptly begins to attract other members of the species when it's released into the air. Other locusts nearby subsequently collect together and rub their hind legs against each other. This in turn triggers the release of serotonin, a neurotransmitter, which leads to swarming.

In the new study, the researchers figured that preventing locusts from releasing 4VA could potentially prevent swarming, so they set to work on understanding its production.

Locusts release 4VA only after they eat, which means certain molecules in the plants that locusts feed on could be triggering its production. The researchers figured right: the culprit was a compound called phenylalanine.

When locusts digested phenylalanine, two enzymes – mainly 4VPMT1 and 4VPMT2 less so – were found to be responsible for converting the non-aggregating pheromone 4VP in solitary locusts into the aggregating pheromone 4VA.To confirm the link, the researchers turned to genetic engineering. When they deactivated the gene that encoded for 4VPMT1, the insects stopped transitioning from their solitary to gregarious phases and didn't exhibit any swarming tendencies.

Molecular deactivation

The researchers also studied how the 4VP molecule bound to the 4VPMT1 enzyme and the amino acids on its structure. Then they identified chemically similar molecules that could bind to the enzyme. When they did, they'd block the receptor for the 4VP molecule, thus stopping enzyme activity and preventing it from converting to 4VA.

Among the many molecules the researchers studied, they found 4-nitrophenol (4NP) fit the two 4VPMTs' binding sites the best as well as prevented the biosynthesis of 4VA.

Xiaojiao Guo, the first author of the paper and insect behaviour researcher at the State Key Laboratory of Integrated Management of Pests and Rodents with a focus on locusts, said locusts' bodies could synthesise the 4VA in only two steps, so the team needed a way to precisely regulate the expression of the 4VPMT enzymes and quickly halt the release of 4VA.

"The two 4VPMTs are key enzymes in the biosynthesis of 4VA and are important targets for inhibiting locust aggregation," Guo said.

"It's worth noting that the binding affinity of 4NP to the 4VPMTs is higher than that of 4VP, thus it can competitively occupy the enzyme's active site."

> As an alternative to small-molecule inhibitors, RNAi insecticides targeting 4VPMTs could also be developed to control locust swarming behaviours

"From the perspective of protein structural characteristics, the specific interaction between 4NP and 4VPMTs ensures the selectivity of the inhibitor and minimizes the off-target effects when interfering with other metabolic pathways. Therefore, the small molecule regulation of 4VA biosynthesis is an efficient strategy for sustainable locust plague management," she added.

There is one catch, however: nitrophenols can be dangerous in an open environment.

Industries widely use compounds like 4-nitrophenols to make dyes, darken leather, and manufacture drugs – and in fungicides and insecticides. The compounds are toxic and are often detected in polluted water and in hazardous waste. They also persist in the environment for a while – roughly two weeks in soil and over two months in sea water – and have shown to irritate the eyes, skin, and airways in humans.

"As an alternative to small-molecule inhibitors, RNAi insecticides targeting 4VPMTs could also be developed to control locust swarming behaviours," the team wrote in the published paper. RNAi is a process in which RNA molecules are used to prevent genes from being expressed inside cells, preventing the corresponding proteins (including enzymes) from being produced.

Non-toxic insecticides

In a swarm, the millions of locusts eat their own body weight in food and can fly more than 150 km in a day.

Human attempts to tame these swarms go back thousands of years, and have taken forms like creating noise and smoke and even shooting arrows.

In the 19th century chemical insecticides came to the fore. Even today, spraying locust swarms in the air with insecticides is still the most commonly used method, and its efficacy is unclear.

The 2019-2020 swarm originated in East Africa after heavy rains and floods created the right conditions for dormant locust eggs to come to life, rendering an 8000-fold increase in the insects' numbers.

The havoc they subsequently wrought reminded the world to develop an effective control strategy.

In one response, for example, scientists from 34 organisations worldwide penned an article in *Journal of Orthoptera Research* detailing major topics of interest vis-à-vis swarming behaviour and organisational weaknesses in the field that allowed the problem to persist.

As alternatives to 4NP, this paper identified seven candidate compounds for further study.

Likewise, the Guo et al. study also proposed a five-step locust control strategy: using synthetic or other 4VA substitutes to attract locusts to a trapping area, where they can be killed by fungal pathogens or pesticides at a small scale; spraying 4VA to prevent aggregation; monitoring population dynamics by tracking 4VA signatures; releasing genetically modified locusts into the field to establish non-gregarious populations; and using the combined strategy of small-molecule regulators in conjunction with biopesticides.

(Sandhya Ramesh is a freelance science journalist. sndhyrmsh@gmail.com)

Filmmaker Peter Jackson, left, and Colossal CEO Ben Lamm hold up moa bones in Wellington, New Zealand. AP

Lord Of The Rings director backs idea to revive moa

Associated Press

Filmmaker Peter Jackson owns one of the largest private collections of bones of an extinct New Zealand bird called the moa. His fascination with the flightless ostrich-like bird has led to an unusual partnership with a biotech company known for its controversial plans to bring back lost species.

On July 8, Colossal Biosciences announced an effort to genetically engineer living birds to resemble the extinct South Island giant moa - which once stood 3.6 m tall - with $15 million in funding from Jackson and his partner Fran Walsh. The collaboration also includes the New Zealand-based Ngāi Tahu Research Centre.

Outside scientists say the idea of bringing back extinct species onto the modern landscape is likely impossible, although it may be feasible to tweak the genes of living animals to have similar physical traits. Scientists have mixed feelings on whether that will be helpful, and some worry that focusing on lost creatures could distract from protecting species that still exist.

The moa had roamed New Zealand for 4,000 years until they became extinct around 600 years ago, mainly because of overhunting. A large skeleton brought to England in the 19th century, now on display at the Yorkshire Museum, prompted international interest in the long-necked bird.

> Scientists say bringing back extinct species onto the modern landscape is likely impossible, although it may be feasible to tweak the genes of living animals to have similar physical traits

Unlike Colossal's work with dire wolves, the moa project is in very early stages. It started with a phone call about two years ago after Jackson heard about the company's efforts to de-extinct - or create genetically similar animals to - species like the woolly mammoth and the dire wolf.

Then Jackson put Colossal in touch with experts he'd met through his own moa bone-collecting. At that point, he'd amassed between 300 and 400 bones, he said.

In New Zealand, it's legal to buy and sell moa bones found on private lands but not on public conservation areas, nor to export them.

The first stage of the moa project will be to identify well-preserved bones from which it may be possible to extract DNA, said Colossal's chief scientist Beth Shapiro.

Those DNA sequences will be compared to genomes of living bird species, including the ground-dwelling tinamou and emu, "to figure out what it is that made the moa unique compared to other birds," she said.

Colossal used a similar process of comparing ancient DNA of extinct dire wolves to determine the genetic differences with gray wolves. Then scientists took blood cells from a living gray wolf and used CRISPR to genetically modify them in 20 different sites. Pups with long white hair and muscular jaws were born late last year.

Working with birds presents new challenges, said Shapiro. Unlike mammals, bird embryos develop inside eggs, so the process of transferring an embryo to a surrogate will not look like mammalian IVF.

If the Colossal team succeeds in creating a tall bird with huge feet and thick pointed claws resembling the moa, there's also the pressing question of where to put it, said Duke University ecologist Stuart Pimm, who is not involved in the project.

THE SCIENCE QUIZ

Please send in your answers to science@thehindu.co.in

Don't make light of light

Vasudevan Mukunth

QUESTION 1

Certain transparent crystals, such as calcite, can split a single beam of light into two separate rays, each travelling at a different speed through the material. This optical property is known for producing double images when you look through such crystals. What is the name of this phenomenon?

QUESTION 2

Light can behave both as a wave and as a particle, a concept that puzzled scientists for many years. Name the scientist who conducted an experiment in 1801, where he shined light through two closely spaced slits, yielding evidence for the wave nature of light by revealing an interference pattern.

QUESTION 3

When using a simple lens to focus white light, you may notice coloured fringes or blurry edges around objects in high-contrast images, especially in photography or telescopes. This effect occurs because the lens bends different colours of light by different amounts, causing them to focus at slightly different points. What is this optical distortion called?

QUESTION 4

When white light passes through a triangular glass prism, it splits into its constituent colours. What is the scientific term for this process, which explains why we see a spectrum of colours?

QUESTION 5

In fibre optic cables, light signals can travel long distances with minimal loss. Which property of light, involving its reflection within the cable at angles greater than the critical angle, makes this efficient transmission possible?

Answers to July 1 quiz:

1. Effect whose discovery proved light is particulate – **Ans: Compton effect**
2. Effect in which a magnetic field splits spectral lines – **Ans: Zeeman effect**
3. Effect that explains rotation of cyclones and Foucault's pendulum – **Ans: Coriolis effect**
4. Effect that explains how airplanes generate lift – **Ans: Bernoulli effect**
5. Effect where a superconductor expels magnetic fields – **Ans: Meissner effect**

Visual: **Photoelectric effect**

First contact: K.N. Viswanathan | Tamal Biswas | Anmol Agrawal | Roshan Khomdram | Joe V.R.

Visual: Name this scientist who was awarded a Nobel Prize in 2018 for her work in developing a technique that revolutionised high-intensity laser physics and boosted fundamental research in optics. BENGT NYMAN (CC BY)

For feedback and suggestions for 'Science', please write to **science@thehindu.co.in** with the subject 'Daily page'

WORDLY WISE

CHAMPIONS KEEP PLAYING UNTIL THEY GET IT RIGHT. —BILLIE JEAN KING

The Indian EXPRESS

FOUNDED BY

RAMNATH GOENKA

BECAUSE THE TRUTH INVOLVES US ALL

SHINE MORE LIGHT

DGCA asking for inspection of fuel switch locking systems is welcome; preliminary report raises important questions

THE PRELIMINARY REPORT of the Air Accidents Investigation Board (AAIB) on the June 12 crash of Air India Flight 171, which killed 241 people on board and 19 on the ground in Ahmedabad, is only a first step in the search for answers. While the AAIB met the 30-day guideline in accordance with the International Civil Aviation Organisation's rules, the 15-page report was released at the very last minute by the Ministry of Civil Aviation, in the early hours of Saturday. It says that the Boeing 787-8 aircraft's two-engine fuel control switches transitioned from Run to Cutoff position within a second of each other just after take-off. In the only bit of information released from the cockpit voice recorder (CVR), one of the pilots is recorded asking the other why he cut off the fuel, to which the latter says that he did not. The switches were returned to the Run position, the report says, triggering automatic engine relight, but it was too late.

While the full and final report will be out in a year's time, what the AAIB report says — and what it doesn't say — has raised concerns. For instance, why does it include only a single paraphrased exchange between the pilots regarding fuel cut-off, and not the full CVR audio and transcript? Notably, it does not say that either pilot moved the fuel control switches during take-off; it merely notes that the switches "transitioned from Run to Cutoff position". Curiously, there has been no press briefing on the report during which questions could be addressed. Not surprisingly, the Airline Pilots' Association of India has criticised the ambiguity, calling it a premature insinuation of pilot error. The report mentions a 2018 Special Airworthiness Information Bulletin (SAIB) issued by the US Federal Aviation Administration (FAA), which flagged that some Boeing 737s' fuel control switches had been installed with the locking feature disengaged — the 787 version has similar switches. As the SAIB was just an advisory, Air India did not carry out any inspections. In a welcome move, the DGCA has now asked airlines to inspect fuel switch locking systems in Boeing 787 and 737 aircraft. The report's concluding section says that it does not recommend any action on Boeing or General Electric. Meanwhile, in what appears to amount to a clean chit for both companies, the FAA has declared that the preliminary report "found no urgent safety concerns" relating to either the engines or the aircraft systems of the 787-8. In this context, the case of the Boeing 737 MAX injects a necessary note of caution. Following the crashes of Lion Air Flight 610 in October 2018 and Ethiopian Airlines Flight 302 in March 2019 — both linked to similar technical faults — the FAA had initially affirmed the aircraft's airworthiness, only to ground the entire 737 MAX fleet between March 2019 and December 2020.

It would be unwise to draw definitive conclusions from the preliminary report, which acknowledges in the foreword that the findings are provisional and subject to revision. Until the final report is out, all the agencies involved must take every possible measure to ensure a fair, transparent, and fact-based inquiry. That is the very least that is owed to the dead and their families — and the safety of passengers every day.

A PROMISING DECLINE

Food inflation eases further. A good monsoon season will help sustain this trend

PRICE PRESSURES IN the Indian economy have receded further. On Monday, data released by the National Statistics Office showed that retail inflation, as measured by the consumer price index, had edged lower to 2.1 per cent in June, down from 2.82 per cent the month before. This is the fifth straight month that inflation has stayed lower than the RBI's target of 4 per cent. Taking this data into account, inflation has now averaged 2.7 per cent in the quarter, lower than the central bank's expectation of 2.9 per cent.

Much of the decline can be traced to the moderation in food prices, with the food and beverages segment witnessing a deflation of 0.2 per cent. Steep declines were also observed in vegetables and pulses. The outlook for food prices is also promising. During the southwest monsoon season, cumulative all-India rainfall has been 9.5 per cent above the long-period average as on July 14. The deficit in the first half of June has been covered. So far, the area sown under all *kharif* crops has been higher than last year. This will sustain the current disinflationary trend in food prices. Alongside, concerns over a surge in oil prices have receded, with oil prices moderating from levels seen during the Israel-Iran conflict. Brent crude oil is currently trading at around $68, down from $75 in June. According to analysts, core CPI, which excludes volatile food and fuel components, has edged upwards in June. But this rise was not broad-based. Price pressures remain muted in some non-food categories such as clothing and footwear, household goods and services, housing, recreation and amusement. However, in the personal care and effects and miscellaneous segments, inflation was high.

The latest data only affirms the decision of the Monetary Policy Committee to frontload the interest rate cuts in its last meeting in June by lowering the policy rate by 50 basis points to 5.5 per cent. But alongside, in this meeting, the committee had said that after reducing interest rates by 100 basis points since February 2025, "policy is left with very limited space to support growth". The current trends in prices, however, raise the possibility of the RBI lowering its inflation projections for the year from 3.7 per cent currently. The committee is likely to opt for a pause when it meets next in August. Further policy action will depend on whether growth and inflation move in line with expectations.

GUTS AND GRACE

At this year's Wimbledon, dignity in victory and defeat told a deeper story

IT IS EASY, in elite sports, to become impatient with vulnerability. To go searching for dominance and drama, and overlook the quiet work of resilience and grace. Over the last two weeks at Wimbledon, however, it wasn't just the on-court exploits that left a mark. It was the dignity with which both victory and defeat were carried that told a deeper story — of the cost of sustaining greatness; of titans coming undone by age; of promise stumbling on the brink of arrival; of rivalries softening into mutual respect. From 38-year-old Novak Djokovic pushing his unwilling body to its limits to women's singles runner-up Amanda Anisimova fighting loss and personal setbacks — the death of her father and a mental-health breakdown — to reach her first Grand Slam final, only to be demolished 6-0, 6-0, this year's tournament threw up moments that were authentic, aching and utterly human.

Jannik Sinner's maiden Wimbledon crown was equally moving, not only for the precision of his play or his athletic supremacy — though his backhand, especially, sang — but for what it revealed about growth. Weeks earlier, at Roland Garros, the Italian had returned from a three-month doping ban and lost the final — from three championship points — to the very opponent he now outplayed. Carlos Alcaraz came into the Wimbledon final on a career-best 24-match winning streak, but Sinner brought something harder to measure: The quiet fire of redemption. Only after the euphoria of his achievement had settled in would he climb into his box, fold into his family's arms, and weep.

Sport, at its most moving, isn't just about mastery, it is about faith. After records have been broken and personal milestones achieved, it is about what it costs to keep coming back, year after year, not always as the favourite, not always whole, but because of the stubborn hope that circumstances change, one dream at a time. At this year's Wimbledon, it was this very spirit — decent, dignified, defiant — that found room to breathe.

Two unequal

World Bank gets it wrong. India cannot have world's lowest consumption inequality and highest income inequality

SURJIT S BHALLA

THE FACTS ARE clear and unambiguous — consumption inequality in India, as measured by the Gini index, was the lowest (most equal) in the world in 2022-23. However, the debate on this is messy and bordering on sordid. What is interesting is that all the important participants in the discussion/debate (Government of India, World Bank, and Indian media) have got it wrong in one way or another. This is not idle armchair criticism, as I document below.

It all started with an essay published on the ORF website which says that, "contrary to popular narratives, India is not merely the world's fourth-largest economy; it is also the world's fourth most equal society". Unfortunately, this is false on both counts. India will not be the fourth-largest economy at least until March 2027; and India today is the most equal society — not fourth most equal — but only in terms of consumption. Its rank in terms of an income Gini is not known since India, to date, has not conducted an official income distribution survey.

The government has endorsed these wrong "findings" through a PIB release; the BJP also wrongfully stated that India was the fourth most equal society — it only differed in stating that we ranked fourth in terms of social equality (whatever that index might be). The endorsers completely ignored the important, and correct, result that India was most equal only in terms of consumption inequality. Critics were quick to pounce, and correctly so, on the errors of interpretation. Which led to them compounding the error. And the debate goes on.

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For example, Surbhi Kesar of SOAS has rightly claimed that the conclusion that India is amongst the most equal countries (as published in the GOI PIB report) was incorrect, since it compared apples with oranges or mixed consumption distributions with income distributions. "A fair comparison would either be to compare India's income inequality with other countries' income Ginis, or compare India's consumption inequality with other countries' consumption Ginis."

This makes perfect sense. Unfortunately, after outlining the right procedure, Kesar makes the same mistake as others. She chooses to use a third source of data on distribution — not consumption, not income, but synthetic estimates of income distribution as published by the private-sector World Inequality Database (WID). WID constructs estimates by its own assumptions — a new literature has developed in leading American economic journals about the unrealistic and questionable nature of WID's synthetic estimates for the US.

Inequality has always been discussed in terms of either the distribution of consumption or of income. Everyone recognises — from survey organisations to policy makers to academicians — that the measurement of distributions is flawed, imperfect, imprecise. All recognise that household surveys are the best instrument for gauging inequality in a society.

Towards this end, the World Bank has laboured to construct the popular and respected Poverty Inequality Platform (PIP), which provides data for all the official consumption and income surveys in the world. PIP reports data on 167 countries, 2,258 distributions for years 1963 to 2024. These data are the only "official" source of comparable income and consumption distributions. "Official" because governments provide unit-level data to the World Bank for analysis by its army of researchers and analysts. There is only one exception to this rigid, and correct, World Bank requirement: China only provides summary ventile (5 percentile) distributions to the World Bank for analysis and subsequent publication. Perhaps BRICS can "influence" China to comply with the open-data requirements of international organisations!

The PIP data does not contain any information on income distribution for India or South Africa — for good reason, because no official income survey exists for either of these countries.

According to PIP, the most unequal (consumption) country in the world, at least for the last 25 years, is South Africa with a Gini of 63.0. The most equal is India with a Gini of 25.5 in 2022.

Notwithstanding its own findings, and the lack of any official data, the World Bank felt compelled to gratuitously note in its April 2025 Poverty and Equity Brief for India: "India's consumption-based Gini index improved from 28.8 in 2011-12 to 25.5 in 2022-23, though inequality may be underestimated due to data limitations. In contrast, the World Inequality Database shows income inequality rising from a Gini of 52 in 2004 to 62 in 2023." The briefs report summary data for 130 developing countries, but only for India does the World Bank quote WID synthetic results on income distribution. To add insult to statistical injury, the World Bank believes that official surveys have data limitations (yes they do), but WID synthetic distributions have no data limitations! In India, we call this kind of inference the advent of Kalyug, the "age of darkness".

The World Bank has been a pioneer in the collection and verification of consumption and income distribution data since its creation. The PIP database is testimony to its intellectual honesty and expertise. However, the World Bank states that India has the lowest consumption inequality in the world; in the same breath (or paragraph) it states (via its endorsement of the WID synthetic results) that India has the highest income inequality. Such a paradoxical result has heretofore not been documented by any organisation in the world, let alone by a well-known and internationally renowned NGO. One of these estimates is clearly in huge error.

The memory banks of the World Bank will reveal that its own research (some 25 years ago) had documented that income Ginis were, on average, six Gini points higher than consumption Ginis. Would the World Bank care to explain how it finds credible an income WID Gini of 62 along with a consumption Gini of 26? What do these "facts" say about the World Bank's credibility? About WID's credibility? The whole world is watching, and awaiting, a meaningful response from sister organisations on this important credibility question.

The writer is chairperson, Technical Expert Group for the first official Household Income Survey for India. Views are personal

ANOTHER KIND OF LOVE

'Aap Jaisa Koi' doesn't wage war on patriarchy. It asks it to listen

VANI TRIPATHI TIKOO

IN INDIAN CINEMA, patriarchy rarely announces itself with a clenched fist. It arrives as habit. As inheritance, and politeness. It lingers in the pauses of male entitlement — in who gets to interrupt, who is expected to adjust, who walks ahead on the street, and who apologises first in love. Netflix's new film, *Aap Jaisa Koi*, directed by Vivek Soni, doesn't wage war on patriarchy. It does something rarer — asking it to sit down quietly and listen.

The film explores what equal love might look like — not as ideology, but as everyday practice. In doing so, it touches one of Indian cinema's enduring blind spots: The inability to portray intimacy without hierarchy.

Patriarchy in Indian cinema has often been dramatised as violence — a father opposing a marriage, a man slapping his wife, or an overt villain controlling the heroine's choices. But its most persistent form is subtle, woven into affection, justified by culture, and disguised as care.

> Patriarchy in Indian cinema has often been dramatised as violence — a father opposing a marriage, a man slapping his wife, or an overt villain controlling the heroine's choices. But its most persistent form is subtle, woven into affection, justified by culture, and disguised as care.

Aap Jaisa Koi understands this deeply. Its male protagonist, Shrirenu Tripathi (played with affecting restraint by R Madhavan), is not a patriarch in the classical sense. He is soft-spoken, educated, even kind. But his kindness comes with conditions. His affection arrives with hesitation. His silence, as the film shows, is not always humility — sometimes it's avoidance, sometimes entitlement.

In one of the most telling scenes, Shrirenu delays expressing his feelings for Madhu Bose (Fatima Sana Shaikh), even as she meets him halfway emotionally. When she finally says, "Don't make your hesitation my burden," it's not a line crafted for applause. It's a quiet resistance — the kind women are forced to offer in relationships built on unequal emotional labour.

What distinguishes *Aap Jaisa Koi* is its commitment to subtlety — not as aesthetic, but as politics. The film resists loud feminism or confrontational drama. Instead, it offers something more intimate: A portrait of negotiation. Between two people. Between tradition and selfhood. Between care and control.

Shaikh's Madhu is not a cinematic "strong woman". She is not angry, argumentative, or radical in the traditional sense. Her strength lies in her refusal to bend quietly. She asks questions. She sets boundaries. She is warm, but unyielding when needed. And crucially, she does not "fix" the man — she waits for him to meet her on equal ground, or not at all.

That itself is a disruption of cinematic convention. Indian heroines have long been expected to absorb — the anger, the indifference, the delay, the distance.

Madhavan's portrayal of Shrirenu is particularly moving because it shows a man struggling not with love, but with unlearning. He is not cruel; he is conditioned. Raised in a family where men withdraw rather than speak, where decisions are made on their behalf by well-meaning elders, his emotional language is half-formed. His journey is not about transformation, but about recognising that passivity can be a form of control, too.

In one key moment, when Madhu offers him affection and clarity, he withdraws, calling himself "not ready". But the film does not applaud this honesty. Instead, it holds him accountable. Readiness, it suggests, is not a virtue when it leaves someone else waiting in uncertainty.

The film's point here is profound: Emotional withholding, when unacknowledged, becomes its own form of power.

Director Vivek Soni and cinematographer Debojeet Ray craft this story with warmth and quietness. There is no spectacle. A raised eyebrow, a pause, a half-finished sentence become tools of power and protest.

One such moment comes when Madhu, returning from a frustrating family visit, confronts Shrirenu not with anger but with clarity. She says what women are often expected to leave unsaid: That love without equality is not romantic — it is exhausting.

And the film listens.

We are living in a time when mainstream Indian cinema is haltingly turning its gaze inward. *Aap Jaisa Koi* is part of that shift. It doesn't deliver a lecture on gender. It models a conversation — one where silence is interrogated, not celebrated; where love is offered, but not at the cost of self.

In doing so, it asks: What does a truly equal relationship look like in a culture still learning to name its biases? And what happens when we stop applauding the bare minimum from men, and start expecting more?

The film doesn't offer easy resolutions. But it offers something better: The possibility that if we can acknowledge our conditioning, we can change it. Gently. Daily. Together.

The writer is an actor, educator, filmmaker, and public policy advocate.

JULY 15, 1985, FORTY YEARS AGO

BLACK BOX ANALYSES

JUSTICE D N KRIPAL, who is heading the court of inquiry into the Kanishka crash, is expected to arrive in Bombay to decide the place and date for the much-awaited analyses of the black boxes. In all probability, the read-out of the cockpit voice recorder (CVR) will take place at the Bhabha Atomic Research Centre (BARC), where similar analyses of the two air crashes in 1976 and 1978 were carried out.

PAK FOR N-TREATY

PAKISTAN IS WILLING to sign a bilateral agreement with India renouncing nuclear weapons, according to a senior Pakistani official. Zain Noorani, Minister of State for Foreign Affairs, told the upper house of Parliament that Islamabad is ready "to join with India bilaterally, or with other non-nuclear states on a regional or a global basis, in a solemn treaty to renounce nuclear weapons".

TWEAKS TO SCHEMES

PRIME MINISTER RAJIV Gandhi said the 20-point programme, put in place by Indira Gandhi during the Emergency, would be suitably modified to meet the developmental needs of the poorer sections of people in the villages. He singled out the implementation of the integrated Rural Development Programme in this context and said changes had to be made in the schemes under this programme to help weaker sections. Gandhi said much had been done for the tribals in Madhya Pradesh "but a lot remained to be done".

ASSAM TALKS

THE FATE of the Saikia ministry could become the deciding factor for the solution of the foreigners problem in Assam. One minor hurdle was crossed in the present round when Union Home Secretary R D Pradhan cleared the element of uncertainty over the resumption of talks. They will begin within 10 days.

Too close for comfort

Canada is looking for new friends after the Trump-induced uncertainty

On July 10, U.S. President Donald Trump announced a 35% tariff on Canadian imports, despite Ottawa rescinding a 3% digital services tax (DST) that was to go into effect on June 30; Mr. Trump had dubbed this as an 'attack on American firms'. Canada expected that it would generate about $5 billion from DST on revenues from Canadian-source digital services over five years dating it back to January 1, 2022. The 35% tax was imposed despite ongoing trade talks, which Canada was hoping would result in a trade deal by July 21 – as agreed upon between Canadian Prime Minister Mark Carney and Mr. Trump on the sidelines of the G-7 summit in mid-June. The new 35% tax, that was conveyed to Mr. Carney through a letter, which Mr. Trump sent to more than 20 U.S. trading partners, is likely to exempt items compliant under the 2018 United States-Mexico-Canada Agreement. Canada and the U.S. are each other's largest trading partners. In fact, despite Mr. Trump's constant refrain about the flow of fentanyl, the opioid coming through America's northern borders (less than 0.1% of what lands in the U.S.), what has rankled the American President is the trade surplus of about $63 billion in Canada's favour. This on-again-off again approach to tariffs as a stick against America's trading partners has forced even steadfast allies such as Canada to scramble to diversify. Hours before receiving Mr. Trump's letter, Mr. Carney posted a picture of himself with British Prime Minister Keir Starmer on X, saying, "... the world is turning to reliable economic partners like Canada."

America's action against Canada brings to mind a similar episode about a decade ago between close neighbours, India and Nepal. India closed land ports following the enactment of Nepal's new Constitution citing fears about the treatment of the minority Madhesi community that has had close ties to India. This action crippled Nepal's land-locked economy that was entirely reliant on Indian ports such as Kolkata and Visakhapatnam for its trade. Acute fuel and medicine shortages followed. Nepal's GDP collapsed from 3.3% in FY15 to 0.2% in FY16, and Nepalis began harbouring a deep resentment toward India. New Delhi's move forced Nepal to recalibrate its foreign and economic policy, eventually leading it to join China's Belt and Road Initiative in 2017 and accepting massive infrastructure funds from Beijing, much to New Delhi's dismay. This episode, between two vastly different nations, would serve Washington well to realise that mending a trade imbalance must not come at the expense of losing one of its closest allies with deep running cultural and linguistic ties, as Canada, with an economy that is one-eleventh that of the U.S. albeit with a trade surplus, now attempts to redraw its foreign and economic strategies.

Courting grass

Sinner and Alcaraz look set to establish a famed rivalry

Feats on grass have a special allure. When they come at Wimbledon, the most prestigious grass court on the planet, they acquire a richer tone of lustre. Jannik Sinner and Iga Swiatek, who won their maiden titles at the All England Club over the weekend, stand testament to this. Both were past Major champions, with Sinner having won three and Swiatek five trophies. Yet, by their own admission, very few achievements rank alongside their runs on the pristine lawns of southwest London. The wins also come at a critical juncture in their tennis lives as both players served doping-related bans in recent months and had their sporting ethics questioned. For Sinner, the success against two-time defending and five-time Slam champion Carlos Alcaraz snapped a streak of five straight losses to the Spaniard. This sequence contained the most painful of all defeats, at Roland-Garros last month where the Italian lost despite being three championship points up. The victory at SW19 showed the 23-year-old's remarkable powers of recovery and mental resilience. For Swiatek, Wimbledon was her first trophy of any kind since the French Open 2024. The Pole, who had spent a combined 125 weeks as No. 1 – seventh best in history – had slid down the rankings and had lost her aura. But by winning on her least-favoured surface, she has resurrected her career emphatically.

Sinner's and Swiatek's triumphs will also have wide-ranging effects on their respective Tours. Sinner and Alcaraz have now split the last seven Majors between them, and Wimbledon was the second straight Slam final they were sparring in. In fact, starting from the Rome Masters in early May where Sinner made his comeback from doping suspension, they have clashed in the final in all three competitions they have both been part of, reinforcing the view that theirs is now men's tennis' pre-eminent rivalry. They have met 13 times – 10 of them in semifinal or better – and appear to have fully satiated fans' desire to see a worthy follow-up to the famed Roger Federer-Rafael Nadal duel. Ranked No. 1 and No. 2, they are also head and shoulders above the rest of the field. The gulf is best explained by Sinner's ATP points-tally of 12,030, which is nearly double that of third-ranked Alexander Zverev. Swiatek, meanwhile, has re-established the triumvirate atop the women's game. The 24-year-old may be the ninth different Wimbledon winner in as many editions, but she, Aryna Sabalenka and Coco Gauff have won 10 of the past 14 Majors. Swiatek's six Slams make her the leading light among active women, a position she seems primed to hold on to.

The importance of India and Europe walking in step

Shashi Tharoor

is a former Under-Secretary General of the United Nations, a fourth-term Member of Parliament (Congress), Lok Sabha, for Thiruvananthapuram, Chairman of the Parliamentary Standing Committee on External Affairs, and the Sahitya Akademi Award-winning author of 27 books, including 'Pax Indica: India and the World of the 21st Century' (2012)

In a world increasingly marked by disorder and divergence, as foreign policy mavens cast about for new policy initiatives, the India-Europe relationship stands as a compelling case for diplomatic renewal – rooted in civilisational depth, yet animated by contemporary relevance. If history has often rendered them distant participants in each other's geopolitical imagination, the present moment demands – and enables – a more purposeful engagement.

Prime Minister Narendra Modi's G-7 diplomacy and External Affairs Minister S. Jaishankar's renewed focus on Europe reflect a conscious pivot towards a continent in flux. This is not merely a recognition of Europe's enduring economic weight or cultural capital; it is an astute reading of the evolving global chessboard, where yesterday's alliances are fraying, and new solidarities are emerging across the hemispheres.

An order upended, a partnership emerging

The transatlantic realm, long anchored by American leadership, finds itself adrift amidst United States President Donald Trump's iconoclasm. His transactional world view, scepticism towards the North Atlantic Treaty Organization, disdain for traditional allies, and dalliance with adversaries such as Russian President Vladimir Putin have unnerved Washington's most steadfast partners. The G-7, once the de facto board of directors for global governance, convened last month not in consensus, but in contention.

For Canada, the United Kingdom, Germany, and France – each recalibrating their foreign policies – the strategic logic of looking eastward has grown sharper. Canada, disentangling itself from overdependence on the U.S., now seeks deeper integration with Europe and emerging powers such as India (the hiccup over its mollycoddling of Khalistani extremists notwithstanding). The U.K., shedding its Brexit-era illusions, embraces renewed continental ties. And Germany, awakened from strategic somnolence, has embarked on a path of defence investment and industrial reinvention. In this milieu, Europe is striving not simply to stay relevant but to become a pole of power in its own right.

The rhetoric of "strategic autonomy", once French fancy, is now echoed in Berlin, Warsaw, and Brussels alike. From French President Emmanuel Macron's nuclear umbrella to Germany's constitutional recalibration for military spending, and the Weimar Triangle's assertiveness in central Europe, the project of European reinvention is well underway.

India's external engagement, long characterised by prudence and non-alignment, is morphing into a more assertive posture of "multi-alignment". In a world veering toward bipolar rivalry between the U.S. and China, India and Europe, both aspirational middle powers, find common cause in championing a multipolar order that is anchored in international law, inclusive institutions and plural values. This convergence plays out on several fronts. The India-European Union (EU) engagement now unfolds on two levels. Institutionally, the EU and India are expanding their long-standing dialogue in areas of shared and exclusive competencies – from trade and technology to security and climate change. Bilaterally, ties with major member states – France, Germany, Italy and, increasingly, the Nordic and Eastern European nations – are acquiring greater strategic depth.

> Their shared values and strategic compulsions can lead to a partnership of conviction and result in a more stable and equitable world

Economic ties as a corridor of opportunity

Few statistics capture the potential of this moment better than the startling rise in bilateral trade and investment. Between 2015 and 2022, EU foreign direct investment in India grew by 70%, with France's investments alone skyrocketing by 373%. In the last three years, EU imports from India have doubled, underscoring New Delhi's growing economic magnetism. Yet, India and Europe are still only scratching the surface.

The much-anticipated India-EU Trade and Investment Agreements must now be fast-tracked with an "early harvest" accord that shows some sensitivity to India's green transition. The European Carbon Border Adjustment Mechanism, laudable in spirit, must be reinterpreted through the lens of equity. Climate ambition must never become climate protectionism. The India-Middle East-Europe Economic Corridor (IMEC) can become a modern Silk Road linking geographies not only in trade, but also in enterprise, energy, and innovation. It is an answer to the Indo-Pacific's demand for infrastructure that is transparent, sustainable and sovereign in spirit.

Perhaps the most exciting frontier lies in technology. India and Europe both view digital architecture not as a proprietary domain of Big Tech but as public infrastructure for the global good. As Mr. Modi observed at the AI Action Summit, the partnership can span the entire digital lifecycle – from innovation to governance, from standards to regulation. Europe's leadership in deep tech, digital manufacturing, and semiconductors dovetails with India's dynamism in software, digital public goods and scalable platforms. Together, they can lead in clean energy innovation, biotechnology, ocean sustainability, food security and resilient health-care systems.

To harness this, both sides must invest in human mobility. A comprehensive mobility agreement for students, scientists and scholars will enrich talent pools, ease Indian unemployment and fertilise bilateral innovation. In the age of ideas, cross-border thinkers are as valuable as cross-border capital.

Strategic alignment now extends to defence and counter-terrorism. Europe remains an important source of armaments for India, and as both sides seek self-reliance – India under Atmanirbhar Bharat, Europe through ReArm 2025 – there is scope for unprecedented co-development and technology transfer. Maritime cooperation, cyber security, space collaboration, and joint responses to terrorism offer a template for trust. Europe must also adopt a firmer line on Pakistan's enabling of Islamist extremism – an issue that has scarred both sides. Technical cooperation is not enough; political will must follow.

In a world where great powers often behave as if might is right, middle powers such as India and Europe must act as custodians of a rules-based order. Not as relics of a liberal utopia, but as realists pursuing stability through coalitions, not coercion. Their shared belief in multilateralism, in resisting hegemonic binaries and in empowering the Global South with inclusive frameworks, sets them apart from more prescriptive paradigms. This ethic must shape their joint leadership in forums from the United Nations to the World Trade Organization (WTO), and from the Quad (Australia, India, Japan, U.S.) to the Artificial Intelligence (AI) governance tables.

Changing minds, not just policies

Finally, let us not underestimate the power of perception. Public sentiment, media narratives and political attention must align with strategic intent. Relationships flourish not merely through summits and statistics, but through empathy, imagination and sustained effort. Europe must move beyond stereotypes of India as a reluctant partner; India must appreciate Europe's complex transitions with greater nuance. The Raisina Dialogue in Marseille (June 2025), the President of the European Commission, Ursula von der Leyen's symbolic visit to Delhi (February 2025), and India's diplomatic investment in the Mediterranean and Nordic regions, are all promising steps.

If the last decade taught us that history has a sense of humour (think of our relations with the two iterations of the Trump Administration), the coming one demands we have a sense of purpose. India and Europe, long circling one another, must now walk in step knowing that their shared values and strategic compulsions form a partnership not of convenience, but conviction. For in each other, they may just find not a mirror, but a window to a more stable, inclusive and equitable world.

Women, STEM careers and a more receptive industry

Kanta Singh

is the Country Representative, a.i. at UN Women India and is a part of Team UN in India

Antara Lahiri

is the Director, Micron Foundation, Asia and Europe. Micron Technology and the Micron Foundation focus on expanding access to STEM education and pathways to high-tech careers of the future

Every year on July 15, as we observe World Youth Skills Day, we are reminded that skills development is fundamental to reducing unemployment and promoting decent work. India faces a critical paradox: 43% of India's STEM graduates are women, the highest proportion among major economies globally. Yet, women represent only 27% of the STEM workforce, limiting women's access to career opportunities offered by the STEM sector.

According to the Periodic Labour Force Survey (PLFS) 2023-24, India's overall female labour force participation rate (FLFPR) has risen to 41.7%, a meaningful jump after years of stagnation. However, the increase is sharper for rural women (47.6%) than in urban areas (25.4%), reflecting barriers in formal employment, workplace safety, and societal expectations. In STEM, the paradox is more pronounced. According to the UNESCO Institute for Statistics (2021), only 31.5% of researchers worldwide are women. This education-employment gap reflects systemic barriers that industry is uniquely positioned to address. The economic stakes are clear. According to estimates by the McKinsey Global Institute, enabling 68 million more women to participate in India's workforce could boost India's GDP by up to $700 billion by 2025. Similarly, the World Bank suggests that achieving a 50% female workforce participation rate could elevate GDP growth by 1%.

Government vision and STEM skilling

The New Education Policy (NEP) 2020 paved the way for higher retention and opportunities in the fields of STEM. The nodal Ministry of Education (MoE) has integrated education with skills development and life skills training. The Government's renewed focus on revitalising Industrial Training Institutes (ITIs) and expanding vocational skilling is bringing high-quality technical education and training closer to villages and small towns, ensuring broader access for youth across rural India.

This progress aligns with the Prime Minister's vision of Viksit Bharat (or developed India), where women's economic mobility forms the cornerstone of inclusive development. The share of the gender budget in the total national Budget has increased from 6.8% in 2024-25 to 8.8% in 2025-26 with ₹4.49 lakh crore in allocation toward gender-specific programmes.

Further, the Union Budget 2025-26 introduced term loans for women entrepreneurs, new National Skill Training Institutes, and investments in technology-driven skilling. India's policy framework, from Skill India to Digital India, and from 'Beti Bachao, Beti Padhao' to PM Vishwakarma Yojana, has the right intent. However, government policy alone cannot bridge the education-employment gap. Industry must transform from passive recruiter to active enabler of women's career transitions.

> World Youth Skills Day is a reminder that industry is losing out by not investing in STEM careers for India's women

Industry as the missing link

Industry plays a critical role in bridging the gap between skilling and employment, especially for women. Persistent social norms, such as the belief that "mechanical means masculine" or that "coding isn't for girls", continue to create invisible barriers for skilled women entering technical fields. These stereotypes are well-documented in multiple studies, including those by the World Bank and UNESCO, which highlight how gendered perceptions limit women's participation in STEM and technical trades. Evidence also shows that women do not leave STEM fields due to a lack of ability, but instead because workplaces are often unwelcoming, families lack awareness of career opportunities, and roles remain deeply gendered. Addressing these perceptions, alongside ensuring workplace safety, equitable pay, and support for career transitions related to marriage, childbirth, and caregiving, is key to unlocking the full potential of the workforce.

India's private sector is increasingly stepping up, with many companies championing structured mentorship programmes, industry-linked training initiatives and partnerships with educational institutions to create direct pathways from classrooms to careers. One such initiative is the UN Women's WeSTEM programme, being implemented in collaboration with the Governments of Madhya Pradesh and Gujarat, and supported by the Micron Foundation. This programme provides access to skills and bridges the talent gap. By engaging families and community leaders, conducting workplace safety sessions, and introducing women role models in classrooms, the programme recognises that skill-building requires a shift in mindsets to be effective.

A blueprint for industry leadership

Industry partnerships with educational institutions, mentorship networks linking professionals with students, and workplace policies that accommodate life transitions and ensure safety, can bridge the education-employment gap. The question is not whether India can afford to invest in women's STEM careers. It is whether industry can afford not to. By equipping women and girls with the skills and training needed to succeed in STEM fields, we can create a more inclusive and robust society. When a woman earns, her voice and impact echoes across dinner tables, shop floors, policy rooms and entire industries. And in that voice lies the blueprint of a future ready India.

LETTERS TO THE EDITOR

Air crash report

The preliminary report arising from the ongoing investigation into the Air India crash at Ahmedabad has pointed to the cutoff of the fuel control switches during takeoff. However, this clarity has, paradoxically, sparked further debate among aviation experts and pilots. At this stage of the probe, varied expert opinions only confuse the issue. The focus must sharpen on regulatory oversight and the rigorous enforcement of proper checks particularly for critical components such as fuel switches. The ambivalent approach to advisories on such critical components — treating them as 'optional' or 'mandatory' — is fraught with danger for flight safety. The aviation sector and the government must act swiftly to ensure that all safety standards are complied with.

V. Nagarajan,
Chennai

At SW19

Bravo, Jannik Sinner. Sinner's Wimbledon triumph over Carlos Alcaraz was more than a first title. It was a statement. Calm under pressure and clinical in execution, he avenged his Roland Garros loss and ended Alcaraz's Wimbledon streak with quiet authority. In a rivalry that is fast defining a new golden era in men's tennis, Sinner's grass-court brilliance shows he is not just chasing history. He is rewriting it.

The All England Club has crowned its first Italian king. And deservedly so.

K. Chidanand Kumar,
Bengaluru

Novak Djokovic needs to introspect seriously about playing competitive international tennis. When he lost in the French Open last month, he said that it may be his last. Now, after the Wimbledon final, it is clear that the last of the three greats must be fading away. That he has won more Slams than Roger Federer and Rafael Nadal is the only consolation.

V. Lakshmanan,
Tirupur, Tamil Nadu

Saroja Devi

In the passing of Saroja Devi, the tinsel world has lost a charismatic heroine most beautiful. She shot into prominence after director Sridhar's *Kalyana Parisu*. Her career catapulted to an unbelievable high when she starred with MGR in a number of films. *Nadodi Mannan* and *Anbe Vaa* were outstanding. With Sivaji Ganesan, *Puthiya Paravai* was a great box office hit. The immortal songs P. Susheela sang for her in her dulcet voice in almost all films are what helped her gain cult status. Such heroines are a rarity today.

A.V. Narayanan,
Chennai

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

Text&Context

THE HINDU

NEWS IN NUMBERS

Number of people arrested in Spain for anti-migrant violence

8 Spanish police arrested these individuals after three nights of violence in Torre Pacheco. The violence erupted after an attack on a 68 year old local on July 11. The town, which has a 30% immigrant population, mostly Morrocans, saw damage to property and increasing tensions. AFP

RE-based power generation capacity achieved in India

50 In per cent. India's total installed power capacity now stands at 484.8 GW, with 242.8 GW coming from non-fossil fuel sources. This marks the halfway point for India's ambitious target for 2030 — to generate 500 GW of renewable energy (RE)-based electricity. PTI

Deaths due to floods in the Vidarbha region in Maharashtra

8 Relief and rehabilitation efforts in the Vidarbha region are underway following heavy rains on July 8 and 9, Maharashtra disaster management minister Girish Mahajan said. In the Nagpur division, seven persons died, and four were injured. In the Amravati division, one death and one injury were reported. PTI

Number of people in Gaza killed by Israeli airstrikes on Monday

22 The latest violence comes as clashes intesify in northern areas. This followed stalled ceasefire talks between Israel and Hamas in Qatar. Gaza City and Khan Yunis were targeted during the strikes. With widespread displacement, Gaza's population faces a humanitarian crisis. AFP

Infections averted by global vaccine reserves since 2000

5.8 In million. Global stockpiles of vaccines under programmes supported by 'Gavi, the Vaccine Alliance,' helped prevent more than 3,27,000 deaths from outbreaks in low and middle-income countries since 2000, according to a new study. PTI

COMPILED BY THE HINDU DATA TEAM

Why is corporate investment lagging behind?

Investment, first and foremost, depends on the demand for the goods it produces. It does not, and cannot, have a life of its own. The situation is particularly grave when the economy is in a downturn/slowdown because demand is down

ECONOMIC NOTES

Rohit Azad
Indranil Chowdhury

India is going through a rocky terrain as far as industrial production and corporate investment are concerned. On June 30, the Ministry of Statistics and Program Implementation (MoSPI) released the monthly growth rate of the Index of Industrial Production (IIP), which has slowed to a nine month low of 1.2%. This piece attempts to explain why industrial activity has not really picked up in any meaningful way since the COVID-19 pandemic.

To be fair, it is not as if the government has not tried. They have tried every trick in their book, starting with a significant corporate tax cut to the tune of eight percentage points in September 2019 (from 30% to 22%), then a significant capex-push over the last few budgets, and lastly an interest rate cut recommended by the Monetary Policy Committee (MPC) recently. The 2024-25 Economic Survey expressed its dismay by stating that "in terms of financial performance, the corporate sector has never had it so good ... (but) (h)iring and compensation growth hardly kept up with it ... Private sector GFCF in machinery and equipment and intellectual property products has grown cumulatively by only 35% in the four years to FY23, (which will) delay India's quest to raise the manufacturing share of GDP, delay the improvement in India's manufacturing competitiveness, and create only a smaller number of higher-quality formal jobs than otherwise."

Determining investment

There is a famous debate between two Marxist scholars, Rosa Luxemburg and Tugan Baranovsky, on what determines investment in a capitalist economy which might be valuable to this discussion. To appreciate this debate and to understand the current predicaments of the Indian economy, we would like to present a basic representation of GDP and its determinants in a 'pure' capitalist economy, that is, one without any State intervention or access to external markets (see Box 1 for such a representation).

GDP can be measured in different ways. What we demand generates production in the economy, with the other side being the income generated for the producers. So, from the income side, the GDP is a sum of workers' wages and capitalists' profits and, from the expenditure/demand side, a sum of workers' consumption and capitalists' investment. The purpose of this piece is to explain the latter.

To get to the meat of the matter, we make a simplifying assumption that workers consume all their wages and capitalists do not consume at all (the argument does not change even if we remove this strict assumption). As Box 1 shows, wages and workers' consumption cancel each other out. What we are left with are profits which must be equal to investment in such an economy. This equation, however, does not tell us whether profits cause investment or investment causes profits. This innocuous relationship has led to quite a debate in economics, which continues to this day.

To resolve this apparent chicken and egg problem, Kalecki, a Marxist economist asked a simple question: of the two, which one can the capitalists decide/control? 'Capitalists may decide to ... invest more in a given period than the preceding one, but they cannot decide to earn more.' In other words, investment determines profits in a given period, not the other way round. But if this is the case, what is the limit to investment? Why can they not invest any amount they like? In fact, why should there be a problem of a lack of investment at all?

GETTY IMAGES

Baranovsky argued that there is no limit to investment provided a certain proportion is maintained between consumption and investment sectors. He went to the extent to say that investment decisions need not be tied to any final consumption demand. An economy where workers' consumption is kept suppressed may still flourish with higher investment and higher profits simply by the decision of the capitalists to accumulate. Since capitalism and accumulation of capital is driven by profitability, investment provides the market for itself. Machines can produce machines to produce more machines.

However, Luxemburg countered by saying that while it's true that investment leads to profits, it does not mean that any amount of investment will necessarily be undertaken. That would be a gross misreading of the relationship represented in Box 1. If the corporate sector were to collectively decide to invest, they would all be generating markets for each other, thereby, generating profits. But, unfortunately, investment decisions under capitalism are made by individual firms/capitalists and their decisions would be driven by their own assessment of demand for the products they produce. For example, in situations where the economy is not growing, it would be foolhardy for an individual capitalist to invest because adding capacity, when the existing factories are not running to capacity, would entail more losses. At the same time, if they were to invest collectively, the economy would have actually recovered. But coordinated or collectively planned investment is an anathema to capitalism.

Investment, first and foremost, depends on the demand for the goods (whether machinery, toys or cars) it produces. It does not, and cannot, have a life of its own. A pure capitalist economy, without exogenous stimuli, cannot provide an endogenous impetus for its own survival. It requires an exogenous stimulus to kickstart the cycle of more investment and profits. The situation is particularly grave when the economy is in a downturn/slowdown because demand is down. The only way there can be a turnaround is if there is a turnaround in demand itself.

The other factor behind investment is finance – internal (retained profits) or external (debt, public offerings etc).

Lagging corporate investment

The government assumed that with tax cuts and higher post-tax profits in the hands of the corporate sector, investment would pick up. But they have perhaps read the profit-investment causality wrong. Even others, who believe there can be an investment-led revival, miss the crucial point that Luxemburg was making. Investment will follow if there is a revival in process; it cannot lead the revival under conditions of slowdown. Investment cannot be made for the sake of investment. It requires the exogenous stimuli that Luxemburg was talking about. Where can that come from?

There are two such exogenous sources – government expenditure and external markets (see Box 2). With a slowing global demand, which is perhaps going to worsen with the 'reciprocal' tariff regime under U.S. President Trump, government expenditure is the most important lever to kickstart the investment cycle. But then has the government not done enough in the form of capex spending? Government indeed has spent but it has so far not succeeded as much as expected. Why?

The idea behind capex spending is that it would crowd-in private investment. This crowd-in could happen through a direct impact on investment as a result of better infrastructural facilities or by generating demand for goods produced by the corporate sector.

While there is no denying that there is a possibility of crowding-in, there are multiple factors at play here. First, the crowd-in of the first kind, which is through better infrastructure, may be delayed due to the gestation lags these big scale projects usually have. For example, a port takes time to build and become operational.

Second, while it is true that all such projects, whether big or small, create an immediate demand, how much of it is domestic demand and how much it is for economies outside depends on the import component of this spending. In other words, a part of this capex may be spent on imports, which simply cancels out without providing adequate domestic demand. Third, even how much domestic demand such a capex would generate depends on the labour intensity of these projects. If most of the money is spent on heavy duty machines, the employment generating capacity will be low, which translates to lower consumption demand.

As for the incentive to finance investment through lower interest rates or liquidity, both of which the RBI has been trying, it is like putting the cart before the horse. Capitalists would take loans only if they believe they will profit from such investment to pay the loans back. With sagging demand, low costs of finance is not enough. As Keynes had famously said, "whereas the weakening of either [speculative confidence or the state of credit] is enough to cause a collapse, recovery requires the revival of both." This simple lesson needs to be learnt by both the RBI and the Finance Ministry if they want the economy to revive.

Rohit Azad and Indranil Chowdhury teach Economics at JNU and PGDAV College, Delhi University, respectively

Box 1

Income method | Expenditure method

GDP = wages + profits = workers' consumption + investment
if, workers' consumption = wages
Therefore, profits = investment

Box 2

GDP = wages + profits = worker's consumption
+ investment
+ govt. expenditure
+ exports - imports

THE GIST

GDP can be measured in different ways. From the income side, the GDP is a sum of workers' wages and capitalists' profits and, from the expenditure/demand side, a sum of workers' consumption and capitalists' investment.

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As for the incentive to finance investment through lower interest rates or liquidity, both of which the RBI has been trying, it is like putting the cart before the horse. Capitalists would take loans only if they believe they will profit from such investment to pay the loans back.

The two-state reality we see today

Abdullah M. Abu Shawesh

Ambassador of State of Palestine to India

Perhaps the only surviving relic of the long-targeted peace process and decades of futile negotiations intended to end Palestinian suffering is the continued talk of the two-state solution. All the other once-sacred phrases – 'land for peace,' 'confidence-building measures,' 'final status issues' – have faded from headlines and memory alike. Yet today, the international community – everyone but Israel and its staunch patron, the United States – continues to parrot the words 'two-state solution' as if they have just discovered a miracle, or reinvented the wheel.

But even a cursory glance at United Nations General Assembly Resolution 181, known as the Partition Plan of Palestine, reveals that the essence of the two-state solution lies within it. Passed in 1947, it called for the creation of two states – one for the Jewish and one for the Palestinians – on the land of historic Palestine. It is, in every sense, the birth certificate of the two-state idea. Yet, in practice, it gave birth to only one state: Israel. The Palestinian state remains unborn. It is trapped in legal text, denied by force, and smothered by a chronic lack of international political will.

A 'two-state' reality

Ironically, if we examine the ground today, we can see that a two-state reality has indeed taken form – but both are Israel's. The first state is the one declared on May 14, 1948, established through the expulsion and ethnic cleansing of the indigenous Palestinian people on 78% of the historical land of Palestine.

The second is rising now on the remaining 22% of the historical land of Palestine, within the borders of the 1967-occupied Palestinian territories: a de facto Jewish messianic state. We can refer to it as the Halakha state – or more plainly, the settler messianic state. It has its own armed militias, openly backed by the Israeli army; its own budget; its own political infrastructure. It is ruled not by Tel Aviv, but by the Yesha Council, an acronym for Yehuda (Judea), Shomron (Samaria), and Aza (Gaza), and subdivided into semi-autonomous regions: the Shomron, Gush Etzion, and Binyamin Regional Councils. Each functions like a federal entity within a greater settler theocracy.

This second state was conceived on the very day Israel occupied the West Bank, including East Jerusalem, and Gaza in 1967. Since then, a stream of legal documents, military orders, appropriated Ottoman and British Mandate laws, and selectively applied Israeli legislation have built its legal scaffolding. This carefully crafted system is meant not only to entrench this parallel state, but also to render the internationally supported two-state solution obsolete.

Israel has grown accustomed, perhaps even addicted, to the diplomatic niceties of international officials, knowing they hold no real consequence. Worse, Israel has now developed a counter-logic, bolstered by its allies, to challenge the very foundations of the two-state vision. The current U.S. Ambassador to Israel, for instance, has gone so far as to claim there is "no such thing" as Palestinians." This genocidal rhetoric has been met by the international community with blind eyes at best and silent complicity at worst.

By signing the Oslo Accords in the early 1990s, the Palestinian leadership made a historic and painful concession: they agreed to establish their future state on just 22% of their ancestral homeland – Palestine. This was not easy. Even UN Resolution 181 had originally allocated 46% of historic Palestine to the Palestinian state.

> The world must stop treating Israel as a state above international law and indulging it as though it is a spoiled, reckless adolescent

At a crossroads

Today, the international community stands at a crossroads. Will it act decisively in favour of a just and rational two-state solution that ends the Palestinian tragedy and brings a sustainable peace for all? Or will it continue to turn a blind eye to the entrenchment of the messianic and evangelical vision that guarantees only bloodshed and despair for Palestinians on their homeland?

This is not just a policy debate; it is a moral test. While a genocidal war is being livestreamed to every screen around the world, we must confront a fundamental truth: there can be no peace without justice. There can be no lasting solution without granting the Palestinian people their basic rights, foremost among them the right to self-determination.

International law, human rights, and humanitarian principles must be applied equally and universally. If the world continues to let Israel, an occupying power, expand and maintain its illegal settlements instead of compelling it to dismantle them, the so-called Halakha state will not only be established in the West Bank, but it will also increasingly dominate and redefine the entire Israeli state. That outcome would be a disaster for Palestine, the whole region, and the world.

The international community has the tools for action. Recently, powerful countries implemented over 16,500 sanctions against Russia. Yet, they remain unable – or unwilling – to adopt even a single meaningful sanction against Israel. On the contrary, Israel continues to receive unconditional military and intelligence support, while the cost to Palestinians exceeds 54,000 lives and counting. From economic sanctions, arms embargoes, and diplomatic pressure to legal accountability in international courts, the tools are within reach but there is no political will.

The world must stop treating Israel as a state above international law and indulging it as though it is a spoiled, reckless adolescent. Accountability is not a luxury; it is a necessity. It is the only path to peace. This may well be the final warning before apocalyptic fantasies turn into a devastating global reality, replacing the two-state solution with endless war.

Reunion or reunification?

The Thackeray brothers have rekindled hope among their party cadre

STATE OF PLAY

Vinaya Deshpande Pandit
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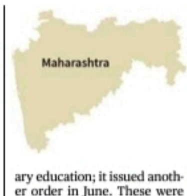


The show of strength and unity between Uddhav Thackeray and Raj Thackeray on July 5 has rekindled hopes of their reunification among the cadre of their respective parties – the Shiv Sena (Uddhav Balasaheb Thackeray) and the Maharashtra Navnirman Sena.

The estranged cousins, who had not shared a dais for nearly two decades, came together to address a joint 'victory rally' in Mumbai. They celebrated the government's rollback of two orders making Hindi the third language in primary schools in Maharashtra. The government's revocation is being perceived as a victory for the 'Marathi manoos'.

However, the big question remains: will the two cousins reunite on the political front as brand Thackeray at a time when regional parties feel threatened by the Bharatiya Janata Party (BJP)? And if they do, what will that mean for the politics of Maharashtra, especially for Deputy Chief Minister Eknath Shinde, who leads the Shiv Sena?

Mr. Uddhav Thackeray's party continues to face an exodus after the split of the Shiv Sena in 2022. The former Chief Minister has publicly expressed his desire for a political reunification with his cousin. However, Mr. Raj Thackeray has maintained a stoic silence and has asked his party leadership to resist from expressing their opinions on the matter. The suspense, ahead of the crucial Mumbai municipal corporation elections, continues.

In April, the Maharashtra government introduced a three-language policy in primary education; it issued another order in June. These were largely perceived as an attempt to impose Hindi on the State. What began as an agitation against this policy has turned into a window of opportunity for the reunification of the Thackeray cousins.

Mr. Uddhav Thackeray and Mr. Raj Thackeray's parties had publicly split 19 years ago. The two leaders have since led separate regional parties. When they came together at the joint victory rally at Mumbai's NSCI Dome on July 5, cadre from both parties watched with excitement. For them, it seemed like a step towards a long-cherished dream of seeing the cousins together again. Their hopes went up further when Mr. Uddhav Thackeray, amid loud cheers, said, "We have come together to stay together." This led to speculation that the two parties will come together for the local body elections.

The Shiv Sena (UBT), which is struggling to keep its flock together, is anxious that fence-sitters may ditch it before the municipal elections. The Sena has traditionally controlled Mumbai's civic body, which is the richest corporation in the country. The diminished strength of the Shiv Sena (UBT) after Mr. Shinde's exit, the changed demography of the island city, and continuing exodus from the party are some of Mr. Uddhav Thackeray's key concerns.

Mr. Raj Thackeray has his own set of woes. He has been leading a regional party with limited electoral gains so far. As he frequently changes his political stance, the public perceives him as unpredictable, which has not helped his cause.

Mr. Shinde's party is hoping that the cousins will not patch up. Mr. Shinde has kept the communication window with Mr. Raj Thackeray open to the extent that his party cadre do not attack the MNS even as they relentlessly target Mr. Uddhav Thackeray.

The BJP is aware that Mr. Shinde will suffer a body blow if the Thackeray cousins come together. Leaders of both the Shiv Sena (UBT) and the MNS claim that the move could be a game-changer and could impact the BJP negatively as well.

So far, Mr. Raj Thackeray and Mr. Uddhav Thackeray have been fighting separately on Hindutva-related issues and Marathi pride. Amid the BJP's Hindutva appeal, the Thackeray cousins have stood for regional chauvinism. "We are Hindus, not Hindis," Raj Thackeray said, as a pitch against the 'Hindi, Hindu, Hindustan' plank of the BJP and the Rashtriya Swayamsevak Sangh. He has warned against national integration through homogenisation and has batted for a separate cultural and linguistic identity for Maharashtra.

At the same time, Mr. Raj Thackeray has categorically stated that he came together with his cousin only for the cause of Marathi. MNS leaders say the show of strength is limited only to that issue, and that Mr. Raj Thackeray has not yet made up his mind on whether it should translate into something more. Political pundits say that if the cousins reunite and assert their political capital, they will both stand to gain.

Dowry deaths in India: Long investigations, rare convictions

A spate of dowry-related deaths in the last two months has put the spotlight back on the illegal practice

DATA POINT

Devyanshi Bihani
Vignesh Radhakrishnan

In the last three months, a string of dowry-related deaths have been reported from across India. In Aligarh in Uttar Pradesh, a woman died after a hot iron was pressed against parts of her body. Her family claimed that she had been regularly assaulted for dowry. Another woman from Uttar Pradesh's Pilibhit was burned alive allegedly after she and her family did not meet the repeated demands of her husband and his family for dowry. In Chandigarh, a young bride died by suicide allegedly due to dowry harassment. In Tamil Nadu, near Ponneri, a woman died by suicide just four days after her wedding, allegedly due to harassment from her in-laws for dowry. Another woman from Tiruppur, Tamil Nadu, took her life within two months of marriage for the same reason.

These cases show that the illegal practice of seeking dowry continues to thrive in India. Every year, in the 2017-2022 period, an average of 7,000 cases of dowry deaths were reported across the country, according to the National Crime Records Bureau. It is important to note that these were only reported cases. As several more go unreported, the NCRB data only gives us a conservative estimate.

The numbers are alarming. And when we look closely at the data, we find that investigations into these deaths were slow and convictions were few and far between.

Of the 7,000 dowry deaths reported every year on average, only around 4,500 were charge-sheeted by the police. The rest were either stuck at various stages of investigation or disposed off for various reasons including 'case true but insufficient evidence', 'false case', and 'complaint was based on a misunderstanding or incorrect information'. Some cases were stuck in the investigation stage for more than six months. Of the nearly 3,000 dowry death cases pending investigation at the end of 2022, 67% were stuck in that stage for over six months **(Chart 1)**.

There were also inordinate delays in filing the charge-sheet. Of the more than 6,000 dowry death cases for which charge-sheets were filed in 2022, 70% were filed following investigations that lasted for over two months **(Chart 2)**.

Even when investigations were done, charge-sheets were filed, and cases reached the court, only a few resulted in convictions. The rest got stuck in court procedures or were disposed off by the courts because they were withdrawn, or compromised, or ended in a plea bargain. In some cases, the accused were acquitted due to lack of evidence.

Of the average of 6,500 cases sent for trial every year, only around 100 resulted in convictions. Over 90% of the rest remained pending in court at various stages. If we look at the rest, some ended in acquittals, some cases were discharged before trial, and some were quashed.

Dowry was the main motive behind over 6,100 murders across India in the 2017-2022 period. Over 60% of these murders were recorded in West Bengal, Odisha, and Bihar. Cases from these three States and Jharkhand, and those in Uttar Pradesh, Madhya Pradesh, Rajasthan, Haryana and Rajasthan constituted 80% of all the dowry death cases filed in the 2017-2022 period **(Map 3)**.

Among the 19 cities in India for which data was available, 30% of all the dowry deaths cases were filed in Delhi in that period, the highest for any city **(Chart 4)**. Delhi was followed by Kanpur, Bengaluru, Lucknow, and Patna.

With inputs from Milan Cijo who is interning with The Hindu Data Team

Crime and slow punishment

The data used for the charts were sourced from the Crime in India reports (book 1 and book 3) published by the National Crime Records Bureau (NCRB)

Chart 1: The share of dowry death cases pending investigation by the end of 2022, by duration

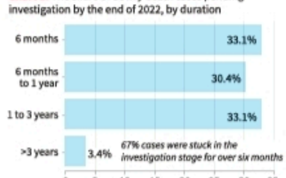
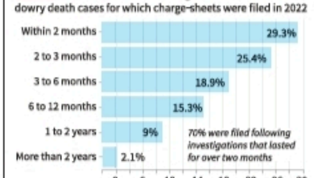


Chart 2: The time taken to file charge-sheets for the share of dowry death cases for which charge-sheets were filed in 2022



Map 3: The State-wise share of dowry death cases filed in the 2017-2022 period

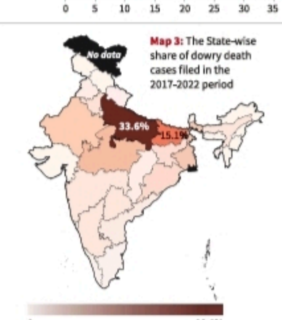
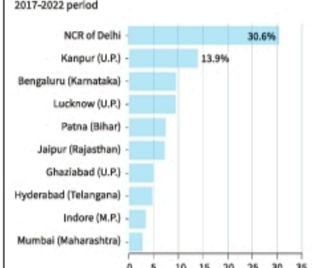


Chart 4: The city-wise share of dowry death cases filed in the 2017-2022 period



FROM THE ARCHIVES

The Hindu.

FIFTY YEARS AGO JULY 15, 1975

Essential goods: Model scheme for four cities

New Delhi, July 14: The Food Ministers of West Bengal, Uttar Pradesh, Kerala and Tamil Nadu to-day agreed to introduce immediately in four selected centres the Delhi model scheme for distribution of essential commodities.

The four centres are: Durgapur, Nainital, Cochin and Coimbatore.

The model scheme, now being implemented by the Delhi administration, is expected to be implemented by other States in course of time.

At a meeting here to-day, the Minister of State for Industry and Civil Supplies, Mr. A.C. George, explained to the Ministers why the scheme should be introduced in the four centres immediately without waiting for the outcome of the experiment in Delhi. In the context of the economic programme announced by the Prime Minister, streamlining of the distribution system had assumed urgency, he said.

The Ministers welcomed the model scheme and said they would gear up their machinery to ensure success of the scheme. They also promised rigorous enforcement of all the provisions of the Essential Commodities Act.

They, however, wanted some more commodities to be brought within the purview of the scheme. For instance, the West Bengal Minister suggested inclusion of mustard oil, drugs, pulses and fish.

The items suggested for coverage are wheat and rice, sugar, controlled cloth, kerosene and salt.

A HUNDRED YEARS AGO JULY 15, 1925

Cause of cancer

London, July 14: After two years work it is believed that British doctors have made the discovery which will enable them to detect the cause of cancer. Dr. William Ewart Gye, one of the discoverers, interviewed, says that he is assisted by Dr. Barnard, a leading microscopist and that he is publishing his report in British Medical Journal in a few days with regard to the experiments carried out in the Hill Laboratories, under the supervision of the Medical Research Council. Dr. Gye says that he followed up Doctors Peyton's and Rous's discoveries and that he is hopeful of having advanced them sufficiently to establish definite results.

Opinion

TUESDAY, JULY 15, 2025

NEIGHBOURLY TIES

Union external affairs minister S Jaishankar

The international situation, as we meet today, is very complex. As neighbouring nations and major economies, an open exchange of views and perspectives between India and China is very important

Half-baked effort

The AAIB report on the AI171 crash is amateurish in its approach as it raises more questions than answers

WHILE PRELIMINARY CRASH reports are not meant to assign responsibility, they are expected to detail the methodology of investigation and highlight questions that demand urgent technical attention. Ironically, the Aircraft Accident Investigation Bureau's (AAIB) preliminary report on the tragic Air India AI171 Dreamliner crash fails on both counts. Instead of instilling confidence in the integrity and direction of the inquiry, it muddies the waters further by raising more questions than answers. The report presents the bare minimum, like a dry sequence of pre-flight activities, engine data, and a brief mention of what occurred during those fatal 30 seconds after take-off. But critical gaps remain unaddressed, and the framing leans heavily toward pilot error, without any supporting analysis or explanation. This is neither transparent nor fair. Consider the central mystery, which is the near-simultaneous shut-down of both engines seconds after liftoff. The report mentions the fuel cut-off switches moving to the "OFF" position, followed by a brief exchange between the pilots—one pilot asking the other why did he switch them off and the latter replying he didn't do so. That's it. No full transcript. No attribution. No attempt to reconstruct who said what and under what conditions. Despite this, the placement of this quote, unsupported by technical analysis or context, subtly nudges readers toward suspecting human error, without saying it outright.

This is the biggest failing of the report. If it's willing to draw attention to the pilot exchange, why does it fail to expand on the 2018 Special Airworthiness Information Bulletin issued by the Federal Aviation Administration, which warned of disengaged locking features on the same kind of fuel control switches used on Boeing 737s, and similar in design to those on the Dreamliner? The report acknowledges that Air India did not inspect these components, citing the advisory nature of the bulletin. But it stops short of questioning whether these switches could have failed. Worse still, the report gives no detailed assessment of the switch assembly recovered from the wreckage, whether the locking mechanism functioned correctly or not.

This silence becomes particularly jarring when contrasted with reports like the Ethiopian Airlines preliminary investigation from 2019. That document, also released within a month, included full cockpit voice recorder transcripts, cockpit control positions, technical diagrams, and a list of immediate safety recommendations. The suggestion that the pilots may have mistakenly or intentionally shut down the engines is quite troubling. The captain of AI171 was a Boeing 787 trainer. He had logged over 8,000 hours on type. This was someone trusted to evaluate others. Casting suspicion on him without evidence is not just unjust, but irresponsible. The report also ignores troubling anomalies. CCTV footage shows the Ram Air Turbine, a backup system that gets deployed when both engines fail, already extended while the aircraft is still barely above the rooftops. That implies the engines failed even earlier than the timeline suggests.

At a time when clarity is essential, the report leaves too much unsaid. No call has been made either for inspections across the Dreamliner fleet, or for testing of similar switches. No immediate recommendations have been offered to prevent recurrence. Union civil aviation minister Kinjarapu Ram Mohan Naidu has rightly urged the public not to jump to conclusions, reminding all that this is only a preliminary submission. But fairness must not only be done, it must be seen to be done. As it stands, the AAIB's preliminary report does not merely fall short of that standard—it crash-lands.

QUESTION OF ETHICS

URBAN COMPANY'S SCRUTINY SHOWS WHY BUSINESS MODELS NEED REPUTATION ENGINEERING

Beyond legal compliance

PRACHI SHRIVASTAVA

Founder, Lawfinity Solutions, and lawyer, Vakil Vetted

INDIA HAS 119 unicorns. At least eight have faced organised worker campaigns in the last 18 months. Their legal teams likely saw none of them coming. The recent *Newslaundry* investigation into Urban Company's treatment of beauty partners has exposed a fundamental challenge facing platform businesses: the gap between legal compliance and social legitimacy. While Urban Company's model may pass legal scrutiny—training kit financing, subscription plans, and commission structures are all contractually sound—the investigation reveals how legally defensible practices can become reputational liabilities in a stakeholder-conscious economy.

This isn't unique to Urban Company. DoorDash recorded $10.72 billion in revenue while workers struggled financially with the broader gig economy challenges. We are witnessing a systematic disconnect between what companies can legally enforce and what society increasingly expects them to ethically deliver.

The financial stakes are higher than most founders realise. Urban Company, last valued at $2.1 billion in 2021 and recently logging $2.2-2.5 billion in secondary transactions, faces organised campaigns like #DryJune customer boycotts and Worker Ka IPO demands for worker participation in company decision-making. These aren't just PR problems, they are valuation events.

Gig platforms derive value from network effects and trust. When beauticians report "days of unpaid work, earnings squeezed by fees, and a sense of permanent indebtedness", you are not just facing worker dissatisfaction, but also undermining the operational foundation that drives customer acquisition, retention, and ultimately, exit multiples.

Unlike Urban Company, which had years to build market position before scrutiny intensified, today's start-ups launch into an environment where worker aspirations and gig economy work structures are already in tension. The margin for error has collapsed.

What's changed is more nuanced than regulatory appetite. Today's customers increasingly factor worker treatment into purchasing decisions. This shift means that business models relying on information asymmetries—where customers don't see the worker economics—face structural obsolescence. Transparency is becoming a competitive requirement. Early-stage firms that build with this assumption will have sustainable advantages over those that treat worker relations as an operational afterthought.

When start-ups consult lawyers about gig economy models, they get compliance expertise on proper worker classification, contracts, minimum wage requirements, etc. These are essential aspects, but insufficient. The key questions that determine long-term viability require integrated legal-brand expertise on the following:

> **The companies that succeed will view reputation risk as a design constraint, not a post-launch problem to be managed**

Signal architecture analysis: What signals does this business model send about our values, and how do the signals translate into legal vulnerabilities? A lawyer can draft a training kit financing agreement, but their playbooks do not assess if requiring ₹40,000-50,000 upfront payments creates a "debt trap" narrative that invites regulatory scrutiny.

Stakeholder risk mapping: How will this model look to different audiences when subjected to public scrutiny, and what legal exposures emerge from reputational damage? Traditional legal advice focuses on direct compliance risks, not the secondary legal risks that emerge when worker advocacy groups organise boycotts or regulatory attention intensifies.

Asymmetric risk assessment: What is the relationship between short-term legal protection and long-term legal exposure? Charging 200-300% markups on supplies might be contractually defensible, but creates reputational debt that can manifest as regulatory action, class-action suits, or legislative changes.

Narrative-legal integration: Can this business model survive intense media examination without creating legal vulnerabilities? The shift from "Insta Maids" to "Insta Help" wasn't just brand management—it was legal risk mitigation in response to dignity-based criticism that could have evolved into discrimination claims.

Once you understand the reputation-legal intersections, you can direct traditional lawyers toward work that protects these business. Early-stage companies need legal advisors who understand that compliance is the floor, not ceiling. Traditional corporate lawyers focus on risk mitigation. But modern business models require risk integration—understanding how legal decisions affect brand equity, customer trust, and investor confidence.

A reputation-aware fractional general counsel brings three key capabilities.

Exposure architecture design: This involves mapping how business model decisions create compound reputational risks. This isn't just about individual contracts, but understanding how operational practices aggregate into brand narratives.

Stakeholder impact assessment: This requires analysing how policies affect different constituencies and their ability to influence company outcomes. Worker unions, customer advocacy groups, and social media influencers can impact valuations as significantly as traditional market forces.

Preventive strategy development: This means building guardrails that protect both legal compliance and social legitimacy—designing policies that work even when subjected to hostile scrutiny.

The Urban Company case illustrates why founders need to think beyond unit economics to unit ethics. Questions every early-stage company should ask include:

Power balance auditing: Are we extracting value or creating it for all stakeholders? Business models that depend on information asymmetries or economic desperation may scale initially but face structural challenges as markets mature.

Transparency stress testing: How would our key operational practices look if fully transparent? In an era of worker advocacy and social media build-up, opacity isn't sustainable.

Narrative alignment: Do our business practices reinforce or contradict our brand positioning? Companies that position themselves as "empowering workers" while structuring economically punitive relationships face credibility crises.

The solution is not abandoning platform business models, but designing them with reputational durability. This requires integrating legal compliance with ethical hardcoding, ensuring contractual rights align with relational realities.

For investors evaluating gig economy start-ups, the key question isn't just "is this legal?" but "is this sustainable when subjected to stakeholder scrutiny?"

The companies that succeed will be those that view reputation risk as a design constraint, not a post-launch problem to be managed. They will build business models that create value for all stakeholders instead of extracting it from the most vulnerable.

Urban Company's challenge is a preview of what every platform business will face as society's expectations evolve faster than legal frameworks. The companies that anticipate this shift will capture the sustainable competitive advantages of the next decade.

Statistics and politics are a dangerous mix

HOW MUCH LONGER can we trust government statistics?

After staffing shortages at the Bureau of Labor Statistics reportedly affected the agency's ability to collect data for the Consumer Price Index last month, a handful of Democratic senators wrote to the Department of Labor demanding to know how it affected the agency's statistics. Earlier this year, the government made the radical move to dissolve several external expert advisory committees that served the BLS and the Bureau of Economic Analysis. Meanwhile, across industries as diverse as medicine, insurance, and education, professionals are dealing with the outright disappearance of data from government websites.

But to answer the question: We can trust the statistics at least until the "Improving Performance, Accountability and Responsiveness in the Civil Service" regulation, proposed by the Office of Personnel Management in April, goes into effect. After that, all bets are off.

The gaps in the CPI data and the dissolution of advisory committees illustrate the two threats facing government data: inadequate funding and political interference.

The former has been cooking for a while. The BLS's budget is down 20% in real terms since 2010, and President Donald Trump's 2026 budget proposes an additional 8% cut. Surveys aren't free to run or maintain, and they certainly aren't free to improve. The Census Bureau has long wanted to modernise the Current Population Survey—which produces one of the most paramount statistics of all, the unemployment rate. It recently designed a three-year plan to make the survey more accurate and cost-effective. Not for nothing, those advisory agencies and other outside experts had been sounding the alarm for more funding and pushing for modernisation in the collecting and publishing of public data.

KATHRYN A EDWARDS

Bloomberg

The threat of political interference, however, is new. It started during the presidential campaign last fall, when monthly employment reports showed a strong labour market. Trump and his surrogates immediately accused the agency of producing "fake numbers". That cooled after he won—but if there is any kind of turn in the numbers, the false allegations will almost certainly arise again.

In October 2020, Trump issued Executive Order 13957 to establish "Schedule F" in the civil service. Its purpose was to reclassify federal employees in certain positions and make them subject to the hiring and firing discretion of the agency lead. In other words: The goal was to undermine merit-based hiring and replace it with political hiring. President Joe Biden rescinded the order in January 2021, but Trump restored in in January 2025. Under this new rule, federal employees whose jobs are reclassified lose their civil service protections, which include appealing a termination they believe was based on political reasons rather than performance.

It is not hard to see how all this might create problems for government agencies such as the BLS. In 2019, former BLS commissioner Erica Groshen was asked about the possibility of manipulating government statistics. She explained that it would be impossible for a political appointee to do so—because the staff would prevent it.

So to bring all this back to the question at the beginning: Government data is trustworthy because of civil servants, but they are in the administration's sights. Once the new rule reclassifying federal employees goes into effect, the staff that produces and maintains the data is at risk. And once they are, the data is, too.

Of course, manipulating a report like the Current Population Survey would be difficult, given its depth of detail and the fact that all the raw data itself is released to the public. It's more likely that the government will just stop publishing the data to the same level of detail—so if there were some changes to the headline numbers, the reasons would be hard to verify.

Integrity and transparency are at the heart of public statistics. It's no surprise that they would be under attack by an administration that values neither.

A Hindenburg moment for Vedanta

DHANENDRA KUMAR

Chairman, Competition Advisory Services India LLP (COMPAD)

It is time regulations on short-selling are circulated and tightened to calm investors and markets and allow corporates to continue with their legal practices

AS MEMORIES OF the Hindenburg attack on Adani fades away, another American short-seller, Viceroy Research, has attacked Vedanta Resource and its Indian group firms, Vedanta Ltd. and Hindustan Zinc. The short-seller has made allegations and claims, including those relating to Vedanta's financial structure.

The Viceroy report raises eyebrows as it came a day before the annual general meeting of Vedanta Ltd. In a prompt rebuttal, the company dismissed it as "a malicious combination of selective misinformation and baseless allegations to discredit the group". Terming the report as "false propaganda", it said, "The timing of the report is suspect and could be to undermine the forthcoming corporate initiatives."

Vedanta has proposed a demerger that will result in four independent and pure-play entities across aluminium, iron and steel, power, and oil and gas. Vedanta Ltd will have the base metals as well as certain other existing and new businesses.

Incidentally, Vedanta Group is a global leader in critical minerals, transition metals, energy, and technology, with operations spanning India, South Africa, Namibia, Liberia, UAE, Saudi Arabia, Korea, Taiwan, and Japan. It is also the world's largest integrated producer of zinc, the fourth-largest global producer of silver, and one of the top producers of aluminium.

Viceroy Research has a tainted history. In September 2021, South Africa's Financial Sector Conduct Authority (FSCA) had fined Viceroy Research and its partners $50 million for false and damaging claims made in a 2018 report about Capitec Bank. The report, which accused Capitec of being a "loan shark", caused a 25% drop in the bank's share price. The FSCA found Viceroy failed to verify its assumptions, ignored contrary evidence, and didn't give Capitec a chance to respond. It also identified a conflict of interest due to a profit-sharing arrangement with a short-selling client. The FSCA coordinated with the US Securities and Exchange Commission during its investigation and warned that it would hold analysts accountable for negligent public statements, regardless of jurisdiction. The FSCA found the statements made in the report were false, misleading, and deceptive, and that Viceroy failed to exercise reasonable diligence in verifying its claims. The FSCA determined that the report was published with the intent of maximising financial gain through a profit-sharing arrangement with a short-seller client who stood to benefit from the ensuing drop in Capitec's share price, which fell by over 23% on the day of publication.

> **The Viceroy report raises eyebrows as it came a day before the annual general meeting of Vedanta Ltd**

While an appellate tribunal set the fine aside on jurisdictional grounds, it confirmed that Viceroy Research was paid to produce its damaging report on Capitec. According to the tribunal's findings, Viceroy had an agreement with hedge fund Oasis, under which it received a monthly retainer of $10,000 and was entitled to 12.5% of net profits made by Oasis on trades based on Viceroy's reports.

In March 2023, concerns over the conduct and motivations of short-selling groups operating in UK markets reached the floor of the House of Commons, as British member of Parliament Liam Byrne called for a debate on the activities of Viceroy Research and its founder, Fraser Perring. During a session in March, the MP alleged Viceroy was operating in close coordination with Boatman Capital, the group that had previously targeted Babcock International—the defence contractor then tasked with overhauling the UK's nuclear submarines.

Medical Properties Trust (MPT) filed a lawsuit in the US District Court for the Northern District of Alabama, accusing Viceroy Research and its partners Perring, Gabriel Bernarde, and Aiden Lau of carrying out a "short-and-distort" scheme to manipulate its stock price. According to the complaint, Viceroy took or aligned with short positions in MPT stock, published false and misleading reports, and amplified the claims on social media to influence investors. The campaign allegedly caused MPT's stock to drop over 35%, led a counterparty to withdraw from a commercial deal, and forced MPT to increase physical security at its Birmingham headquarters. The case ultimately resulted in a settlement and dismissal last year. MPT announced on December 18 that it had reached a mutual settlement with Viceroy and its members, resolving the defamation lawsuit filed on March 30, 2023.

What makes the strategy of short-selling particularly concerning in emerging markets like India is the erosion of investor confidence. Large firms undergoing complex restructuring or transformation become easy targets. The Hindenburg-Adani saga, with its journey in the Supreme Court, and finally Hindenburg's closure is still fresh in our memories.

Short-selling, which allows investors to sell a stock without owning it at the time, is a dangerous practice. Naked short-selling is banned, with the Securities and Exchange Board of India (Sebi) mandating investors to fulfil their obligation to deliver securities at the time of settlement. Sebi's 2024 circular explicitly says only stock traded in the futures and options segment are eligible for short-selling. It is time regulations in this regard are circulated and tightened to calm investors and markets and allow corporates to continue with their permitted and legal corporate practices.

LETTERS TO THE EDITOR

When education fails

Apropos of "Widening learning gap" (*FE*, July 14), India's aspiration to emerge as a global economic powerhouse by 2047 is fundamentally threatened by the chronic shortcomings of its education system, which continues to deliver poor learning outcomes despite decades of reform rhetoric. The alarming gaps in foundational literacy and numeracy, especially at the primary level, signal not just a learning crisis but a looming productivity disaster. Beyond access, the focus must urgently shift to quality—through better teacher training, outcome-driven assessments, and integration of digital learning tools tailored for multilingual, rural contexts. Without structural reform and political prioritisation, India risks squandering its demographic advantage and falling short of its development vision.

—Amarjeet Kumar, Hazaribagh

Protecting investors

Apropos of "Protecting capital markets" (*FE*, July 14), the Securities and Exchange Board of India (Sebi) accused US-based Jane Street of manipulating India's derivative market with unscrupulous trading strategies and earning ₹36,671 crore. It seems that Sebi slept well until Jane Street earned such a sum through short cuts. Retail investors who enter the securities market without awareness are the scapegoats for the gimmicks of algorithmic foreign firms. Sebi must augment its surveillance on the market, prevent such manipulations at the roots, and save innocent investors' money.

—NR Nagarajan, Sivakasi

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OPINION

The Hindustan Times
ESTABLISHED IN 1924

[OUR TAKE]

Recalibrating India-China ties

These need to be firewalled from external factors such as the Dalai Lama's succession and China's trade and foreign policy initiatives

External affairs minister S Jaishankar is in China at a crucial time for bilateral relations, which are on the long road to normalisation after a four-year military standoff on the Line of Actual Control (LAC). While Jaishankar is visiting the northern neighbour for a meeting of foreign ministers of the Shanghai Cooperation Organisation (SCO), he also held talks aimed at taking forward bilateral ties. Noting the good progress in the normalisation process, Jaishankar told his counterpart Wang Yi the two sides must address border-related matters such as de-escalation. In this sphere, the main focus should be on firewalling the normalisation of relations from external factors such as the Dalai Lama's succession and China's trade and foreign policy initiatives. Beijing's support for Islamabad during Operation Sindoor has cast a shadow over India-China relations. And the Chinese leadership's hardline stance on the Tibet issue — a Chinese spokesperson has called it a "thorn" in China-India relations and a "burden" for India — and its restrictions on exports of key commodities such as rare earths and fertilisers further complicate matters.

Beijing should know that the Dalai Lama is not just a "separatist" political leader, as it wants the world to think. He is today the most respected Buddhist leader, god to some and guru to others, and his following is trans-national. India itself is home to millions of Buddhists who revere the Dalai Lama, and hence, his presence in the country will be handled accordingly. New Delhi believes in the separation of church and state, and the political leadership here has historically refused to be involved in the domain of religion, especially in the conduct of religious affairs and succession issues. The judiciary has intervened only when approached by the concerned parties for redress. In the case of the Dalai Lama's succession, it is not New Delhi's intent to play the institution against Beijing, but to accord him the respect due to him as a spiritual leader and the head of a large religious community, and accept the choice of the Buddhist laity in deciding his successor.

China, which believes in total control over society, seems not to understand this separation of powers between the political, temporal and spiritual domains, and continues to perceive India's approach towards the Dalai Lama in purely political terms. The Dalai Lama has said more than once that all he desires is greater autonomy for Tibet and protection for the Tibetan people. The Dalai Lama's statement thanking India — and the Indian perception of the leader — needs to be seen from this perspective.

Addressing Bihar's employment crisis

The 2020 Bihar assembly election narrative was dominated by the primary opposition Rashtriya Janata Dal (RJD)'s promise of a million government jobs once it came to power. Whether it was the Lok Janshakti Party (LJP)'s sabotage or RJD's job-promise appeal, the Janata Dal (United) suffered heavily in the elections, posting its worst-ever seat tally since 2000. Chief minister Nitish Kumar's promise of generating 10 million jobs in Bihar over the next five years on Sunday seems like a well-thought-out preemptive strike against the Opposition's criticism of the lack of employment opportunities in the state.

Bihar is one of the poorest states in the country and a major exporter of both skilled and unskilled labour. In fact, barring labour migration, consumption standards would have been significantly worse in the state. Any serious strategy to reverse Bihar's economic fortunes must capitalise on the state's demographic dividend in addition to managing it. Bihar has among the highest fertility rates in the country. Should Nitish Kumar's latest promise on jobs – the numbers ought to be taken with more than a pinch of salt, given the fact that Bihar's total workforce itself is about 40 million – be treated as just another electoral rhetoric? No serious politician can ignore the issue of employment. But there is one welcome change in Kumar's promise compared to his primary opponent's. He has rightly clubbed job creation in the private sector along with government jobs to promise better prospects to Bihar's young workers. This is a more honest and pragmatic way of dealing with Bihar's employment challenge. Both the government and the Opposition should include this in their political messaging rather than promising a turnaround on just government jobs.

Destruction of the old economic order

A new economic order is yet to emerge, and the current upheaval will continue for some time

Janmejaya Sinha

Till a year ago, the underpinning of the global economy and trading system was the "indebted" American consumer. The global superpower, the US, ran a $1.2 trillion-dollar current account deficit with the rest of the world, with China running the largest bilateral trade surplus of $295.4 billion (exporting $439 billion to the US). On the capital account, the US had achieved the unimaginable. Earning more on its roughly $35 trillion invested in the rest of the world then it paid out on its $62 trillion inflows (about 40% of which was in fixed income and US government debt instruments). Though its net international investment position was very negative, its net investment income was positive till last year. This was made possible, primarily, because the dollar was the reserve currency and the international medium of exchange.

US retail consumption was fuelled by debt. Equally, the US government ran a massive fiscal deficit which accentuated to over 6% of GDP (around $2 trillion) post the handouts made during Covid. The largest lenders to the US were Japan and China (holding over a trillion dollars of US treasury). China's economy was export based and since the turn of the century, it became the largest trading partner to all countries other than the Nordics, the UK, France and Germany, replacing the US in that role. China today is around 36% of global manufacturing, 18% of global GDP and only 13% of global consumption. Essentially today, Americans consume too much, and the Chinese produce too much!

The US economy has done very well over the last 25 years. In just the last 15 years, the US, which was about the same size as the European Union (EU), has become 60% larger than the EU. The per capita of both Canada and the UK is worse than that of the poorest American state. But while Wall Street, the American multinational companies, and technology startups and Silicon Valley flourished, main street and the old American middle class languished, as their jobs were shipped overseas. The way the model worked was that the large flows of capital into the US allowed the financial sector (banks, venture funds, private equity, alternative investment funds, pension funds, and all) to thrive through intermediation. Plentiful risk capital was available to support innovation and risk taking. This was further supported by the best universities, attracting top global talent and US government incentives for research and innovation. The US equity markets reached stratospheric levels evidenced by the fact that just the top six technology stocks of $17.3 trillion had a total market capitalisation greater than that of Canada, the UK and Germany combined. According to Forbes, the number of American billionaires rose from 240 in 2000 to 902 in 2025. The other big winners were the profitability of American companies that offshored their manufacturing, most of all to China to take advantage of cheap disciplined labour with poor rights, and strong Chinese government incentives to support the shift.

The rise in inequality and the stagnation in middle-class wages frustrated much of main street in the US. Their jobs were shipped across, wages stagnated and a belief that the future of their children was going to be worse than theirs, took root. This was what Trump understood and pandered too, with his Make America Great Again slogan. He accentuated their despair by blaming the American elite, accusing the rest of the world of doing unfair trade with the US, and immigrants from taking away American jobs.

Trump campaigned to fix this imbalance in the global trading system. Reduce the US's current account deficit by raising tariffs on imports, tighten immigration and let the dollar weaken to encourage exports. He hoped that by cutting taxes, keeping oil prices in check, middle America's consumption would not be much affected, and the tariffs would bring back jobs to the US. He banked on a spurt in economic growth by his tax cuts, tariffs and cuts in expenditure and deregulation. To attract his base, he also attacked American universities as being elitist and woke and cut funding to them.

Trump's continued tax cuts and inability to curb government spending will likely worsen US fiscal deficit and not reduce consumption. BLOOMBERG

Given the core of the problem is the indebted and heavily consuming American, and the large fiscal deficit, Trump's continued tax cuts, and inability to curb government spending, will likely worsen the fiscal deficit and not reduce consumption. The uncertainty in his tariff announcements is not a recipe for corporate planning.

Reduction in immigration puts pressure on labour costs and restricts the entry of top talent. The weakening dollar will challenge its status as a reserve currency (already the net investment income has turned negative for the US).

Equally, central banks across the world have sharply increased their holdings of gold, euro and yen at the expense of the dollar. Neither does China show any plans to consume more. Recent Chinese government actions show a rise in manufacturing investments increasing global overcapacity in ships, rail, autos, aircraft and capital industries. China seeks to build a stranglehold on critical minerals, critical machinery and electronics and has major investments in technology, defence and space together with a strong capital stockpile.

Trump's presidency has delivered grievous damage to the old economic order. The new economic order is yet to emerge, and the current upheaval will take some time to settle. The required equilibrium of lower US consumption and lower Chinese production is not on the anvil. Countries (and companies) need to assess their interests, using multipolarity where they can, and recognising, as the former Singapore Prime Minister Lee Hsien Loong said that "choosing between US and China will be painful" but will need to be skillfully navigated!

Janmejaya Sinha is chairman, BCG India. The views expressed are personal.

[SIMPLY ECONOMICS]

Pramit Bhattacharya

The possibilities and limits of the Tamil Nadu model

Drawing attention to the sharp differences in incomes across developing countries, the Nobel-winning economist Robert Lucas had suggested that we should see these differences as possibilities. "Is there some action a government of India could take that would lead the Indian economy to grow like Indonesia's or Egypt's?" Lucas wrote in an oft-cited 1988 paper (the Indian economy was considered a global developmental laggard then). "If so, what, exactly? If not, what is it about the 'nature of India' that makes it so? The consequences for human welfare involved in questions like these are simply staggering: Once one starts to think about them, it is hard to think about anything else."

Looking at the stark differences in incomes and human development indicators across Indian states, similar questions come to mind: Is there something that Uttar Pradesh could do to grow like Tamil Nadu or Maharashtra? If so, what exactly? If not, why not? Such questions have gained greater salience as inter-state disparities have widened in recent years.

Some economists and policy wonks seem to have found an ideal growth "model" in the state of Tamil Nadu. With manufacturing accounting for a quarter of the state's economic output, Tamil Nadu is seen as a *desi* version of Vietnam. Former chief economic advisor Arvind Subramanian has argued that the Tamil Nadu model could be adopted by other states to improve their industrial performance. Venture capitalist-turned-philanthropist Ashish Dhawan has also made similar arguments, praising the role of the state government in hand-holding new investors.

Compared to other industrialised states such as Haryana or Maharashtra, Tamil Nadu has more impressive attainments in health and educational outcomes. That makes it more attractive as a developmental model compared to either Kerala (which lacks a modern industrial base) or Gujarat (which has relatively poorer human development outcomes), economist Pranab Bardhan has argued.

What lies behind Tamil Nadu's developmental success? A part of the answer lies in the unique political economy of the state. The two major Dravidian parties share a common heritage and have adopted similar policy positions on key socio-economic issues. Both parties were born out of an anti-Brahminical movement going back to the British Raj, and have sought to empower the intermediate castes (OBCs). As some of these communities transitioned from traditional farm-based activities to modern businesses, they received bipartisan support from the state's politicians. Entrepreneurs were never seen as "class enemies" to begin with, and continue to enjoy greater social legitimacy than in many other parts of the country.

COMPARED TO OTHER INDUSTRIALISED STATES SUCH AS HARYANA OR MAHARASHTRA, TAMIL NADU HAS MORE IMPRESSIVE ATTAINMENTS IN HEALTH AND EDUCATIONAL OUTCOMES.

Dravidian ideologues advocated industrialisation and modernisation of the economy so that Tamil society could break free from the shackles of caste-based occupations and hierarchical traditions, economists Kalaiyarasan A and Vijayabaskar M wrote in their 2021 book, *The Dravidian Model*. The Dravidian ideologues envisioned a democratisation of capitalist activities, and promoted the interests of local businessmen, the duo argue. The pro-business tilt in the state's policy stance has endured despite a series of corruption scandals over the past three decades.

Any state-level policymaker who wishes to emulate the Tamil Nadu model must also note its limits. Over the past decade, Tamil Nadu's share in manufacturing employment has declined even as those of other states have increased. While the organised manufacturing sector has grown rapidly, the unorganised sector seems to have languished. Since the unorganised sector employs more people, the gains in employment have been much less impressive than the gains in manufacturing output.

Second, despite the state government's significant investments in health and education, a growing section of the state's population has been turning to private educational and health care providers in search of better quality, as Kalaiyarasan and Vijayabaskar note.

Third, the state government's OBC-friendly tilt in social policies seem to have benefited some sub-castes (or *jatis*) much more than others. For instance, in 2007, Tamil Nadu abolished the common entrance test (CET) for admissions to professional courses since it was deemed to favour socially privileged communities (who could afford private coaching). While the move helped widen access to technical education, it is the better-off communities within OBCs that gained most, a 2019 analysis by R Srinivasan and N Raghunath showed.

Despite these limitations, Tamil Nadu's track record in delivering inclusive growth remains better than most other states. The southern state offers useful lessons for other regions.

However, it may not be easy to replicate the Dravidian model in toto, since that model rests on an unique demographic endowment. Most Tamils belong to lower caste groups and hence it has been relatively easy to build a consensus in favour of egalitarian policies in the state. Upper castes account for only 2% of Tamil Nadu's population according to the last National Family Health Survey.

In states such as Uttar Pradesh — where upper castes account for nearly a fourth of the population — the Dravidian model may not be easy to implement. Yet, if Uttar Pradesh were to achieve a (Tamil Nadu-style) political consensus on socio-economic reforms, it will find it easier to generate inclusive growth.

Pramit Bhattacharya is a Chennai-based journalist. The views expressed are personal.

[S JAISHANKAR] EXTERNAL AFFAIRS MINISTER

As neighboring nations and major economies, an open exchange of views and perspectives between India and China is very important.

During a meeting with Chinese vice-president, on the sidelines of the SCO meet

Why India must have a standalone LatAm policy

Hari Seshasayee

Prime Minister (PM) Narendra Modi's five-nation visit to Brazil, Argentina, Ghana, Trinidad & Tobago, and Namibia was dubbed as New Delhi's outreach to the Global South, headlined by the Brics Summit in Rio de Janeiro. As far as visits go, this was a routine exercise in diplomacy and New Delhi's way of courting the developing world. The Rio summit will be remembered mostly for the absence of the Chinese and Russian presidents, and the inclusion of Indonesia to the grouping. Whether an expanded Brics will eventually present an alternative to the western-led order is open for debate.

But politics is secondary to business when it comes to Latin America. PM Modi's visit complements an existing economic relationship that is driven largely by private actors across India and the Latin America and Caribbean (LAC) region. There is far more interplay between Sao Paulo and Mumbai than there is between Brasilia and New Delhi.

From a trade standpoint, India is more important to Brazil than the other way around. In 2024, India was Brazil's ninth-largest trading partner; for India, Brazil was in the 27th place. Trade can also be viewed from a broader, global context. For example, India's trade with far-off Brazil is about the same as trade with neighbouring Bangladesh, and India exports more to Brazil than it does to Japan or Turkey. Brazil's trade with India is more than its trade with neighbouring Chile or with major economies like South Korea or France.

When we look at specific sectors, the significance of India-Latin America trade amplifies multifold. Over the past decade, 42% of Argentina's vegetable oil exports have been shipped to India; that number reached 52% in 2024. On the other hand, India is amongst the largest providers of Latin America's pharmaceutical products, agrochemicals, two- and three-wheelers, amongst other products. In large part, India exports value-added products to Latin America, while the region exports mostly commodities to India. The exceptions are India's exports of unwrought aluminium or cotton, and Latin America's exports of wine and processed foods.

More edifying is the investment between India and the LAC region. Indian companies employ about 16,000 people in Brazil, and 8,000 in Argentina. Across the region, the number reaches nearly 100,000. For some Indian companies, like the agrochemical giant UPL, Latin America remains the highest revenue generator, with nearly 40% of UPL's global revenue coming from Latin America.

There are more strategic sectors in play: Brazil's aviation giant Embraer recently opened a subsidiary in New Delhi, and India's EXIM Bank opened its office in Sao Paulo earlier this year, its first in the region. Previously, EXIM Bank's office in Washington DC managed its Latin America portfolio. In June 2025, the Indian Farmers Fertiliser Cooperative (IFFCO) announced that Brazil will be the destination for its first overseas nano fertiliser manufacturing plant. In Argentina, India's State-owned Kabil has started exploration of lithium blocks in 2024. Once India establishes a lithium value chain domestically, including refineries capable of processing industrial salts, lithium carbonate and lithium hydroxide, its investments in Latin America's lithium triangle could be a valuable contribution to securing direct and stable access to the critical mineral.

Modi's overtures to countries like Brazil and Argentina, and the previous visits by India's foreign minister S Jaishankar to eight LAC countries, are proof of an increase in political will. Yet, this should not be framed only within the context of India's outreach to the Global South, which dilutes the region's importance. Instead, New Delhi should formulate a standalone Latin America strategy, built on a foundation of energy and food security, and critical minerals.

There is a natural complementarity between India and the LAC region: What India needs, Latin America has in abundance, such as mineral resources, large arable land for agriculture, and copious reserves of petroleum. Latin America, on the other hand, regularly seeks out India for its affordable health care and pharmaceutical products, its vehicles and machinery, amongst other things. The three pillars that New Delhi's strategy can be founded on — energy security, food security and critical minerals — are bound to become even more pertinent in the future, and India should not lose out by being a slow mover.

Hari Seshasayee is co-founder of Consilium Group and visiting fellow at the Observer Research Foundation (ORF). The views expressed are personal.

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