

The  
**Hindustan Times**  
ESTABLISHED IN 1924

[ OUR TAKE ]

## Reinventing India in US mainstream

New Delhi needs to reach out to the new America to build its case as a valuable ally

This is not the best of times for immigrants and foreign workers anywhere in the world, most of all in the US. Indian immigrants and tech workers in the US are at the receiving end of a swell of nativism and nationalist politics. The rise of the Make America Great Again (MAGA) movement, visible in the policies of the Trump administration, especially its stance on H-1B visas (India is the biggest beneficiary of this visa regime), and international trade, has contributed to the anti-immigrant mood. Indians are clearly in the line of fire, despite President Trump's reiterations that Prime Minister Modi is a dear friend and the projection of Indian Americans as a model immigrant community. The anti-India campaign on 4chan, an anonymous imageboard website, in the wake of a hike in H-1B visa fee is symptomatic of this undercurrent. Grandstanding by officials such as secretary of commerce, Howard Lutnick, that India must "stop taking actions that harm America", may be further feeding the sentiment.

What should India do? One, the rise in anti-India sentiment is linked to domestic politics in the US. Diplomats could reach out to friends of India in the US Congress and Senate, and convince them to dispel the notion that Indian interests are inimical to the well-being. Two, the American business community should be persuaded to highlight the Indian contribution to American tech and business and how outsourcing has helped the US economy. India should support and sponsor surveys to press the point that the association with India has led to the creation of jobs in the US. There are studies that detail the contributions of Indian Americans to the US's economic, scientific, social, cultural and civic life, and how entrepreneurs of Indian origin contribute significantly to job creation in the US. These need to be amplified in the new climate to influence public opinion. India should also attempt an outreach to the MAGA street to emphasise how India's democratic credentials, family values, and work ethic have much in common with the US, and why Trump 2.0 must build on the groundwork done by past administrations to think long term and build closer ties. New Delhi should also invest in US universities, think tanks, and cultural institutions to embellish its outreach and, if necessary, rebrand its profile, to make India's case in the new US polity.

The MAGA movement is ideological, but its world view is transactional. This gives New Delhi room to negotiate without compromising its national interests and abandoning its pursuit of multipolarity in global affairs. This is a political task, no doubt, but restricting the focus to politics, or depending on the personal chemistry between leaders, will limit the outcome.

## Reinforcing New Delhi, Moscow relations

After some years of stagnation, the India-Russia relationship has gained in importance as Moscow emerged as one of the main energy suppliers for New Delhi and Russian-origin armaments were extensively used in the conflict with Pakistan in May. However, the relationship has faced pressure from the punitive levy imposed by the Donald Trump administration over Russian oil purchases and the calls for India to end its military procurements from Russia. As Russia and India prepare for President Vladimir Putin's visit to India towards the end of the year, Russian foreign minister Sergey Lavrov has emphasised that ties between Moscow and New Delhi are independent of and immune to the ups and downs in the India-US relationship. At a time when the US continues to criticise India's purchases of Russian energy and military hardware, Lavrov was categorical in asserting that there is "no threat" to the relationship. Lavrov lauded India's foreign policy and the Indian side's "self-respect" in standing up to the US.

Lavrov's comments are a validation of India's stated policy of multilateralism amid the churn on the international stage. Russia will continue to be a crucial energy and security partner for the foreseeable future, and India should stick to its stand of choosing its own partners. Russia's partnership with India is also an answer to detractors who accuse Moscow of having hitched its bandwagon to Beijing. At the same time, however, Russia needs to deliver on its promises of making two-way trade with India more balanced by providing greater market access and stepping up and diversifying its procurement of Indian goods. Greater economic integration will provide ballast for and reinvalidate the long-standing partnership.

## Spotting the opportunity in Trump's H-1B salvo

Beyond the initial pain, the opportunities to upscale human capital and drive innovation are most certainly significant gains for India

What impact will the numerous actions the US has taken, in a somewhat haphazard manner, in the last six months have on its own economy and that of India? To answer this, we need to understand the US exceptionalism that allowed a country with 4% of the world's population to produce 27% of global GDP, account for 50% of global market capitalisation, and be an undisputed leader in technological innovation. Just between 2020 and 2025, its economy in nominal terms grew from \$24.4 trillion to \$29 trillion. It is worthwhile to examine what underpins US exceptionalism and why I am putting blame by the actions of President Donald Trump, as I feel they erode the foundations of what made America great.

Post-World War II, and especially after the fall of the erstwhile Soviet Union, the US had become the sole global superpower, and the US dollar was the global reserve currency. By 2000, the US was the largest trading partner for most of the world. In the last 25 years, even though China replaced it as the world's largest trading partner, the US dollar singularly

remained the global reserve currency. Being the reserve currency was a remarkable privilege. The US attracted \$62 trillion (40% of which was in fixed income) at low rates while earning more on its \$35 trillion invested abroad to allow it to have a positive net investment income overall.

Four factors underpin the US's continued success economically: It attracted the best global talent, had the best universities in the world with the highest funding for R&D; the US dollar was the reserve currency, and the US received a net \$27 trillion dollars (or essentially unlimited) risk capital, and American companies earned the highest profit margins, due to a combination of very strong R&D, top talent, access to plentiful cheap capital, and the ability to outsource manufacturing and services to cheap and disciplined labour anywhere in the world (often with countries throwing in incentives like free land and tax breaks to attract its investment) that would make life for the US at the thinnest margins. Despite how some American companies were hurt by the shifting out of factories from their neighbourhoods, even the White middle class in the US did better than their counterparts in most of Europe.

During Covid, it is true that supply chain disruptions highlighted that some of the gains of the past decade need to be present in-house to curb dependence. But the impact of the current actions in the long run

appears to me to be self-defeating. While tightening immigration and changing asylum rules had almost bipartisan support, tightening H-1B visas hits American technology companies the hardest. Over 70% of H-1B visas were given to Indians, though this number had been coming down. Closing this avenue will start cutting the tide of cheap talented workforce in the technology sector, the bedrock of US innovation.

The attack on top universities such as Harvard has already had an impact on the applications to the US globally and from India. They are down more than 27%. Currently, the US earns around \$44 billion from foreign students, with around \$20 billion of this coming from India. This will fall, but more importantly, the flow of global talent to the US will decrease. American companies will not have the pick from the best in the world.

This combined with a sustained attack on the US Federal Reserve's independence will erode bond markets and the current depreciation of the dollar supposedly to spur manufacturing will impact the inflow of limitless capital to the US. Already one can discern a shift away from the dollar as central bank holdings of gold have spiked and even the euro and the yen have increased. Attracting manufacturing back with tariffs will reduce the profits of American companies that will lose access to cheap labour and even the euro and the yen have increased. So, American consumers will be faced with higher priced goods if produced internally or through high tariffs on



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goods imported.

For India, this opens a very definite opportunity. Over the past decade, India has become a consequential economy, adding \$5 trillion to the global GDP — going from 1.5% of global GDP to almost 7% of the global GDP. Our equity markets offer the best multiples supported by domestic investors. And subsidiaries of global MNCs listed in India enjoy higher multiples than the parent companies in their home markets.

India needs to capitalise on the presents offered by the Trump presidency after the initial pain felt by a few companies. Four actions are needed to do this.

It must attract \$100 billion from the \$27 trillion that is going to start getting very poor returns in the US. It must also attract 20,000 of the 290,000 Indians on H-1B back to India. Each company should target to bring back 25 to 50 people. The government could consider creating 100 centres of advanced learning (artificial intelligence, biotech, human brain

research, quantum computing, robotics, etc), thereby supporting the creation of an entire value chain with just \$1,000-core investment for each.

The AI centre should be in a state that offers land for data centres, attracts an advanced data global capability centre, and encourages corporate partnerships with the advanced centre.

Corporates should see how to raise their R&D spend from today's abysmal 0.56% to 1.56% of GDP by using these centres in partnership. To curb the loss of \$70 billion we spend each year overseas on education, can we relook our education policies to spur the start of 10 new universities, hiring faculty from the US? This could possibly be done in collaboration with overseas universities, in a for-profit education sector with less curbs on it.

Trump has created the opportunity for India. It is up to us to grab it. The future is in our hands.

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

## Cleanliness mission where every citizen is a safai mitra

I still recall the moment in 2014 when Prime Minister (PM) Narendra Modi picked up a broom and swept a Delhi street. It was far more than symbolism: It was a powerful reminder that the mission of a clean India cannot rest solely on the government but must be embraced by every citizen.

A clean India is a shared responsibility, and the true strength of the Swachh Bharat Mission (SBM) has been how it has turned cleanliness into a people's movement. It has turned every citizen into a *safai mitra* (friend of cleanliness) — from school students to housewives, shopkeepers to farm and factory workers. Millions picked up the broom, transforming cleanliness from a government programme into a personal pledge of dignity, health, and pride.

That single vision sparked a true *jan andolan* (people's movement), where cleanliness became a matter of honour and pride. PM Modi's calls of *na gandagi kareng, na karne denge* (neither will we create filth nor will we let anyone create filth) and *swachhata hi seva* (cleanliness is service) inspired citizens across the country to act. What began as a government-led mission soon turned into the pride of every street, every neighbourhood, and every home, driven by an extraordinary wave of behavioural change.

In 2014, less than 40% of households had toilets. Today, more than 12 crore families have access to sanitation. Through the Swachh Bharat Mission, India has been declared open-defecation-free (ODF). The slogan *Har Ghar Shaukhalya* (a toilet in every home) is no longer just a promise, it is a reality, bringing safety and dignity to millions of women and children, along with improved health. The World Health Organization estimates that the lives of nearly 300,000 children have been saved because of reduced diseases linked to open defecation. The mission has now moved on to sustaining the ODF status and introducing comprehensive solid and liquid waste management, scientific processing of waste. The vision for SBM-Urban 2.0 is to achieve garbage-free status by institutionalising and nudging *swachh* (clean) behaviour amongst the citizens.

The PM's genius has been to make the SBM about more than toilets and streets. It is about pride, culture, and the soul of the nation. From the Swachh Vidyalaya Abhiyan — giving schools separate toilets for girls and boys — to the Rashtriya Swachhata Kendra, a living tribute to Mahatma Gandhi, every initiative has inspired citizens to see cleanliness as a mark of respect for themselves and their country. Festivals are brighter when they are plastic-free, celebrations are more joyful when they do not leave behind waste, and each citizen understands that their small act contributes to a larger national pride.

We have witnessed a remarkable journey of the SBM — millions of toilets constructed, villages and cities declared ODF, and citizens embracing cleanliness as a shared responsibility. It has been my firm belief that the campaign must now seek to transform collective con-

sciousness into daily discipline, making *swachhata* (cleanliness) not just a practice but a way of life, and ensuring that the gains of the past decade form the foundation of a cleaner, healthier, and more dignified India for generations to come. Most importantly, this phase of the mission focuses on developing the capacities of local bodies not just to look visibly clean but address the issue of waste processing and remediation of legacy dumps. Even the largest cleanliness survey, *swachh survekshan*, now measures the city cleanliness on parameters of door-to-door waste collection, handling and processing of waste.

With this vision, we celebrated last year's SHS week (SHS-24) under the theme *Swachh Swachhata — Sanskar Swachhata* (Temperament of Cleanliness — Culture of Cleanliness) which reflects a profound shift — from infrastructure to instinct, from compliance to culture. We aim to establish cleanliness not as an obligation, but as a reflection of our character and values. Every citizen must internalise it as a habit and moral responsibility.

By embedding cleanliness into our *swachh* (nature) and *sanskar* (ethos), we are not just sweeping streets — we are shaping a more dignified, healthier, and united India. The transformation will come when *swachhata* (cleanliness) becomes second nature, passed down through generations as a cherished legacy.

As the festive season begins, the PM has reminded us that celebrations are most meaningful when they are clean and eco-friendly. In this spirit, *Swachhata Hi Seva* (SHS) 2025 is being observed from September 17 to October 2, under the theme *Swachhata* (Festival of Cleanliness), with a focus on sustainability — promoting plastic-free villages, zero-waste festivals, and waste segregation at source. The campaign reinforces that cleanliness is not a one-day effort but a continuous responsibility towards future generations.

SHS 2025 observed *Ek Din, Ek Ghar, Ek Saath* (One Day, One Home, All Together) on September 25, the birth anniversary of Pandit Deendayal Upadhyay. On this day, crores of Indians reached out to support the *safai* (cleaning, donation of labour), reaffirming that cleanliness is everyone's responsibility.

Last year alone, over 800,000 neglected spots in towns and villages were transformed into vibrant public spaces — proving that collective effort can make cleanliness visible, tangible, and truly life-changing.

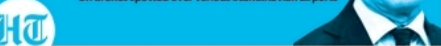
The greatness of this mission lies not only in its achievements but in its spirit. Every sweep of the broom, every clean corner, every plastic bag reduced is not just about sanitation, it is about dignity, pride, and the India we want to leave behind for our children. Cleanliness is not someone else's work; it is everyone's mission. I urge everyone not to confine *swachhata* to a single day or a *pakwada* (fortnight), but to carry this spirit throughout the year. *Swachhata* is not an event — it is a way of life. Each of us must take responsibility in our homes, neighbourhoods, and communities, and practice it every single day. Let us make cleanliness a daily discipline and commit ourselves to the pledge of *Har Din, Ek Ghar, Ek Saath* — one hour of collective effort, every day, where every citizen is a *safai mitra*.

Manohar Lal Khattar is Union minister, ministry of housing and urban affairs and ministry of power. The views expressed are personal

[ ULF KRISTERSSON ] PRIME MINISTER, SWEDEN

Everything points to (Russia), but then all countries are cautious about singling out a country if they are not sure. In Poland, we know that's what it was

On drones spotted over various Scandinavian airports



## For women, platform work is no easy gig

Domestic worker services are the latest addition to the platform economy — an area that has sparked ongoing debates about ethics and sustainability. Questions are being raised about fair wages, safety, security, and how the new form of gig work might affect traditional employer-employee relationships. Regardless of where this discussion leads, it is clear that gig work is transforming India's rapidly expanding labour market. This sector is expected to reach a value of \$100 billion this year, with over 77 million Indians engaged in gig work — women making up nearly 20% of this workforce. The gig economy includes ride-hailing, food and parcel delivery (including quick, ten-minute deliveries), as well as services such as beauty, cleaning, carpentry, and plumbing.

The flexible nature of gig work offers women an opportunity to balance employment with household responsibilities. In a country where traditional gender roles often limit women's participation in formal employment, gig work provides a practical alternative. For instance, a woman in the World Bank survey said that 52% of women engaged in gig work reported greater economic independence. Many women also value the ability to choose jobs that fit their schedules, allowing them to manage both work and family commitments more effectively.

Despite its benefits, gig work also presents significant challenges, especially for women. The digital divide remains a major obstacle. Data from the National Statistical Office shows that over half of women in rural areas do not have independent access to a smartphone. In contrast, more women in urban areas — over 70% — own a mobile device, but the gap with men remains wide, with 80% of rural men and 90% of urban men owning smartphones. This digital gap limits women's ability to access gig platforms and participate fully.

Women also carry a disproportionate burden of unpaid housework and caregiving. Recent data indicate that women spend 289 minutes daily on household chores and 137 minutes caring for family members. While gig work's flexibility can be helpful, the additional responsibilities often leave women with little time or energy to pursue earning opportunities. Safety concerns and the risk of harassment are always present, whether on the road or with clients. For women gig workers, safety concerns are a major deterrent. Most gig workers need to

traverse public spaces and streets, and sometimes go into households (domestic work, beauty services). In cases of sexual harassment or violence, it is extremely difficult to access justice. These women workers fall into the cracks as they cannot take advantage of laws on sexual harassment in the workplace.

Another concern is the lack of public toilets and rest spaces. Since they need to move around throughout the day, this poses a serious problem. Public toilets in our cities are woefully few and not always safe or well-maintained. Also, these workers are often not given access to toilets in homes where they provide services. Many women workers say that they don't drink adequate water, just to avoid going to the toilet. Further, in conditions of heat and high pollution, the lack of spaces to rest between jobs places a health risk for all gig workers.

Financial hurdles also hamper women's full participation in gig work. The costs of licences, vehicles, and other necessary investments are often prohibitive, especially for women from disadvantaged backgrounds. Additional challenges include lack of independent access to bank accounts or capital, making it difficult to receive payments and sustain consistent work.

Recently, state and national legislation on social security for the platform economy have been enacted. The Central Code on Social Security, 2020, defines gig workers as those outside traditional employment structures and provides for social security measures such as health and disability cover, accident insurance, life and maternity benefits, and old-age protection. Similarly, states such as Rajasthan, Telangana, and Karnataka have introduced Bills to provide social security and other entitlements. We still have to see how these are going to translate into laws and regulations.

As gig work continues to grow in India, it offers both opportunities and challenges. Addressing issues like safety, the digital divide, health care, and financial access is crucial to making gig work a viable, empowering option for women. With targeted efforts and supportive policies, the platform economy can become a more inclusive space that benefits all workers.

Kalpna Viswanath is co-founder and CEO of Safepay, a social enterprise which uses technology and apps to collect data for the safe movement of women in urban spaces. The views expressed are personal



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TUESDAY - SEPTEMBER 30, 2025

## Trading snags

SEBI rules on technical glitches should apply to all

**T**he number of retail investors in the stock market has grown rapidly since the pandemic, and with it the pressure on stockbrokers to provide an efficient trading interface. Some stockbrokers may not have upgraded their trading systems to cater to the increase in number of clients, leading to frequent trading halts. Meanwhile, clients have become more vociferous, taking to social media often to raise trivial issues regarding stock trading.



A recent consultation paper of the Securities and Exchange Board of India (SEBI) proposing a review of the framework to address technical glitches in stockbrokers' electronic trading systems, is therefore welcome. The framework was brought into effect in December 2022; the experience shows that certain modifications may be required. SEBI must reconsider the most important proposal in this consultation paper — exempting small brokers with less than 10,000 registered clients from this framework. The paper suggests reducing the compliance burden for around 457 smaller brokers, suggesting that almost one-fifth of the stockbrokers will not be obliged to report on trading halts for more than five minutes on account of faults in their hardware, software, connectivity, products or services. This means that there will be no regulatory protection for investors trading through smaller brokers never mind the fact that technology needs to be robust with all stockbrokers, irrespective of their size.

It would also be helpful to get some clarity on which technical glitches really matter. Leaving out technical glitches that occur outside market hours from the ambit of these rules makes sense, since such disruptions do not inconvenience any user. It can reduce the additional cost of monitoring the system beyond trading hours. Leaving out issues in decision-making tools such as technical charts, failure in payment gateways, technical issues at the back-office which do not impact trading, from the definition will filter out frivolous investor complaints. But the rules need not leave out technical glitches which occur due to malfunctioning of the cloud service, or those that pertain to global technology partners. While such disruptions may lie beyond the control of the stockbroker, they do inconvenience investors who need to be informed about the stoppage, the duration of the halt, or possibility of recurrence.

The paper proposes allowing stockbrokers more time to inform stock exchanges and their clients about the technical glitch. The 2022 regulations stipulated that stakeholders should be informed within an hour. SEBI proposes to increase the time to two hours. The problem with granting additional time is that a lot of confusion can be caused by posts in social media. Investors and traders need to be informed as soon as possible, so that they can execute their trade through other sources. Stock exchanges should feature technical glitches prominently on their website. This will help investors pick an intermediary with more robust system, and nudge all brokers to invest in their trading systems.

## POCKET



Published by Nirmala Lakshman and Printed by Praveen Senthilnar at HT Media Ltd. Plot No.8, Vijay Nagar, Greater Kailash I, New Delhi 110048. GSTIN: 07AAG0000002. Editor: Raghav Srivastava (Editor responsible for selection of news under the PIP Act).



A. VASUDEVAN

**I**t is now more than a month since the August monetary policy changed perspectives from an almost exclusive focus on the policy rate to the importance of managing the liquidity position in the system. This critical change in the last monetary policy statement deserves to be commended. Its value and significance can be seen in the midst of the current economic upheaval and geopolitical turmoil caused by America's discriminatory and selective tariffs without any rationale, and with the added uncertainties brought by the hefty \$100,000 fee for every new H-1B visa.

The prospect of good growth during the current fiscal year should not overlook the criticality of liquidity for the next monetary policy as liquidity is the key for developing financial markets and for initiating optimism for increased private investments. The government, on its part, fostered the domestic demand potential by supportive direct tax changes and, more recently, goods and services tax reforms. These policy initiatives one hopes would help substantially address the tariff challenge posed by the US.

The August policy pause appears close to one of the mantras of the "new" financial economics that prevailed in the 1980s and 1990s, distinct from the later day modern monetary theory (MMT). The former emphasises financial constraints and seeks to limit government deficits. In contrast, MMT posits that for a sovereign government empowered to issue currency, public debt is not a constraint but a policy tool and the related interest rate dynamics fall in the jurisdiction of monetary policy, given the exchange rate regime.

## LIQUIDITY SURGE

The surge in liquidity in the banking system is now estimated at ₹3-4 trillion. As commercial banks are flush with funds, they will need to find outlets for loan-making and investments in different assets including government securities and to an extent the standing deposit facility available at the Reserve Bank. If for some reason banks' loan portfolios do not grow sufficiently, their investment portfolios would have to, by implication, bulge. Mutual funds would get more funds and corporate bonds of the triple-A kind and new issues of companies would report gains in terms of funding. Stock markets would perform well.



## Should there be trading among financial assets?

**ASSET BARTER.** Store of value is critical for trade settlement between two types of assets without involving cash transfer. But this could constrain the effectiveness of monetary policy

The preferential choice among assets would be guided essentially by three criteria — safety (relatively high risklessness), rate of return and liquidity. Clearly some liquid assets will acquire the status of 'moneyness' and would be traded fairly easily with other assets depending on the holders' preferences. For instance, if an individual, say, 'A' has treasury bills and wants to acquire shares of a company or a cluster of companies, the search for trading for such shares would begin. In case entity 'B' with company shares is willing to acquire government securities from 'A', a trade settlement between the two types of assets without involving cash transfer could occur, though the terms of settlement would still be in terms of the unit of account, namely 'money'.

The preferential choice among assets would be guided essentially by three criteria — safety (relatively high risklessness), rate of return and liquidity.

Here, as we can gauge, trading between assets that have store of value is a critical pointer for the Reserve Bank to take note of situations where crypto assets, including the recently mentioned stablecoins that are not as yet given any official recognition, could also be part of transactions. But it is important to recognise that crypto assets are very much present all over the world. In fact, they are said to be in sizeable amounts (estimated at about \$4 billion) now in India, thereby pointing to the preference of economic units for cryptos in addition to other assets as a store of value.

As is known, the current Budget has provided for crypto tax. It is therefore important to communicate clearly the position of the government on cryptos. Assuming that cryptos would be recognised, the RBI would need to work out, in close collaboration with other regulators in India as well as the fiscal authorities and other countries where cryptos are not banned, a regulatory framework for trading among financial assets with or without attendant cash movement.

What if transactions are conducted in

the new issues or primary markets by the two parties or by only one of the parties preferring to acquire a secondary market asset from the other party, without involving cash transfers but with a transfer of IOUs or some such paper that would be valid for settlement at a future date that would go beyond the current period? Will this in any way constrain monetary policy effectiveness? What if assets (cryptos, stablecoins or some such thing) are traded freely in the assets markets? Do these challenges not impact the effectiveness of monetary policy, with the chances of generating possible financial stress?

Economic analysts may also need to revisit data on savings of households and corporates as financial markets grow, and new financial engineering tools emerge. Such an action would help estimate the correct investment rate that plays as critical a role as productivity in growth estimations.

The writer is a former Executive Director, RBI, and currently an independent analyst. Through The Billion Press

## MPC should opt for a pause in upcoming policy

This will preserve flexibility amid evolving growth risks. Also, clear forward guidance vital for markets in prevailing uncertainty

Upana Bhardwaj

**A**s the Monetary Policy Committee (MPC) gears up for its October policy review, the macro backdrop presents a delicate balancing act. While domestic inflation shows significant signs of moderation, the growth outlook remains clouded by intensifying global headwinds — from tightening US tariffs on goods to emerging risks in the services sector risking the fragile export momentum. The recent GST rate cut (following the income tax cuts in the beginning of the year) has come at a strategically opportune time, offering a timely cushion against the adverse spillovers from tightening US trade policies.

The annualised GST impact on GDP could be to the tune of 0.6-0.7 per cent. However, the tariff led uncertainty could shave off growth by 0.6-1 per cent. The impact could be even higher if the spillover continues in the services sector too. Overall, following the unusually high QFY26 GDP of 7.8 per cent (and an expected 7 per cent reading in QFY26), the 2H FY26 GDP growth could slow down towards 6.5 per cent as the tailwinds and headwinds play out. While the FY26 reading overall could appear robust around 7 per cent given the benign deflator, there's a need to

focus on the nominal GDP growth which has been sliding significantly and appears to be reflective more closely of the on-ground reality. While the FY26 real GDP growth may appear robust at around 7 per cent, largely due to a benign deflator, the persistent slide in nominal GDP growth (FY26 likely around 9 per cent) along with muted corporate earnings growth of about 7 per cent in 1H FY26 offers a more grounded reflection of underlying weakness in the economic momentum.

## INFLATION OUTLOOK

On the inflation front, while erratic heavy rains do pose upside price risk to perishable items, the tailwinds from GST cuts (75-100 bps downside likely depending on the extend of pass-through) and buffers from low crude oil prices provide comfort not just for FY26 but also most of FY27.

Given the benign growth-inflation dynamics, while there seems to be adequate scope for further monetary easing in due course, it is important to highlight that the adverse sentiment in the bond market is emerging as a significant hindrance to effective monetary transmission.

Amid escalating risks of fiscal slippage due to subdued tax buoyancy — further exacerbated by recent income and GST rate cuts — the bond market outlook is



DURABLE LIQUIDITY. Could go down

increasingly overshadowed by concerns of additional government supply. Moreover, the G-sec market is experiencing spillover pressures from elevated State Development Loan (SDL) issuances, particularly at longer tenors. Collectively, these factors are limiting the intended benefits of monetary easing.

Given that fiscal imperatives are overshadowing the effectiveness of monetary policy, providing clear and credible forward guidance on the scope for further monetary easing would be more effective in calming market nerves than an immediate rate cut — which may simply signal the end of the easing cycle. Sustaining market expectations of potential rate cuts could prove more beneficial for investor sentiment than the rate action itself.

Besides the rate cuts, while the liquidity conditions remain conducive, the external shock from US tariffs introduces asymmetric risks, particularly for MSMEs in export-heavy sectors. The tightness in liquidity, even temporarily, could amplify stress if global demand remains subdued or if MSMEs face delayed payments and inventory pile-ups.

## LIQUIDITY DRAIN

The durable liquidity could drain down towards ₹1.5 trillion by the end of FY26 from current levels of around ₹5 trillion. The impact of CRR cut is only partially likely to offset the leakage from seasonal up-tick in currency in circulation and maturity of around \$25 billion of RBI's forward book in 2H FY26. The RBI will need to be agile with proactive intervention to avert any credit squeeze.

Overall, while there remains room for an additional 25-50 bps rate cut given the still-elevated real rates, the MPC should opt for a pause in the upcoming policy to preserve flexibility amid evolving growth risks.

A dovish forward guidance, instead, could offer markets the necessary reassurance to navigate the prevailing uncertainty.

The writer is Chief Economist, Kotak Mahindra Bank. Views are personal

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## AIR of yesterday

The book review "You heard it on All India Radio" (September 29), kindred sweet remembrances of yesterday. The 1970s and 80s generations grew up listening to All India Radio (AIR) and Radio Ceylon, famously called 'langai Vanoli'. The major AIR stations in the pre-Vivid Bharathi era were very conservative in broadcasting film songs. There was a forthrightly publication by name Vanoli in Tamil carrying the scheduled programmes along with the name of the film and the song to be broadcast during 'cine song' hour. When AIR relaxed the commercial air timings during 1984-85, all major stations of AIR had their commercial ads during prime time. In those days, access to commercial broadcasts was restricted to Vivid Bharathi

alone in select cities.

With the onset of FM, radio stations broadcasting on AM and SW frequencies had become a thing of the past. The present day commercial FM have become a major cacophony, unfortunately.

RV Baskaran

Pune

## Retaining bank depositors

This refers to Bank depositors as 'Yeh di maange more' (September 29). Depositors are now focussing more on other avenues of investment as bank interest rates have been falling. Banks, therefore, have to step up their marketing strategies not only to retain the existing depositors but also bring new customers into their fold. This can be achieved only through

personalised and prompt service.

Katuri Durga Prasad Rao

Hyderabad

## Managing gatherings

The horrific stampede at Karur during a TVK rally addressed by actor-turned-politician Vijay exposes yet again the chronic failures in managing mass gatherings. The causes remain tragically familiar — poor planning, inadequate communication, lack of crowd psychology awareness, and absence of swift damage-control. Political rallies across India often treat crowds as mere markers of popularity, overlooking basic safety protocols. But lives lost in pursuit of spectacle cannot be dismissed as collateral damage. From political campaigns to religious

congregations and concerts, organisers must adopt a culture of vigilance and accountability.

N. Sathyaiva Reddy

Bangalore

## Nation builders

Businessline Changemaker Awards truly deserve applause — both for the remarkable awardees who are transforming lives across defence, education, healthcare, agriculture, technology, and social empowerment, and for the organisers and sponsors. By honouring pioneers like DRDO, the Azim Premji Foundation, grassroots innovators and social catalysts, the awards not only celebrate individual excellence but also underline the urgent need for science, compassion, curiosity, and

inclusivity in nation-building.

SM Jeeva

Chennai

## Credit penetration

This refers to India's 'big' bank ambitions can pose difficulties (September 29). Despite Jan Dhan accounts and the UPI, loan penetration is still wanting. Farmers need credit tied to crop cycles and direct transfer. MSMEs require invoice-based credit lines, gig workers portable accounts, and women community-linked banking via accessible nodal network. Regional banks and cooperatives will continue to anchor the last mile, while large banks and fintech handle scale and innovation.

R. Narayanan

Ravi Mumbai



US shutdown worries

Republicans- Democrats face off over Budget

—Sridhar Krishnaswami

The sleeves are rolled up as usual as Republicans and Democrats face off with a potential government shutdown on October 1 unless the two sides can come to an agreement on an interim package. The Republican controlled House of Representatives passed a stopgap measure that Senate Democrats would have no truck with.

After cancelling a meeting with Democratic leadership, President Donald Trump has apparently agreed to meet the top four leaders of Congress on Monday that would include Democratic Minority leaders of the House and Senate, Hakeem Jeffries and Chuck Schumer respectively. "We are resolute in our determination to avoid a government shutdown and address the Republican healthcare crisis. Time is running out", the two said in a joint statement.

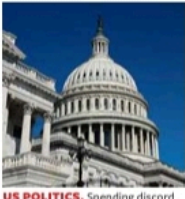
In an effort to put pressure on Democrats, the Trump administration has supposedly issued instructions to lay off thousands of federal workers across agencies. The fear is that in line with the ongoing cuts in federal bureaucracy in the last eight months, the White House could use the pretext of a shutdown to permanently remove a huge chunk from the payroll.

JOB LOSS THREAT

For instance, the Environmental Protection Agency (EPA) that has come under special attention of the Trump administration is reportedly under pressure to further trim its headcount. A full or partial shutdown will see hundreds of thousands of federal workers forced to stay home or working without pay, at least temporarily, with disruption of operations not deemed as essential. A prolonged shutdown will impact markets as well as slow down growth.

What makes this time different is that Democrats in the House and Senate do not seem to be too worried of the blame being pinned on them. In fact the base was so riled in March that the leadership meekly caved in. Many called for the present set to move aside or be replaced by those to challenge the Republicans and the White House. And the call for a more effective strategy came not just from the left-of-centre but also from Progressives and Independents.

These factors seem to have made a difference in the tone and tenor of senior Democrats this



US POLITICS. Spending discord

time around. If the Republican leadership has brushed aside demands of Democrats on healthcare as "completely unhelpful and unreasonable and unserious", Senator Schumer shot back: "What's 'unserious' is ignoring the 93 per cent spike for health insurance coming to Americans on November 1".

Unacceptable to the Republicans are not only demands to extend subsidies limiting the cost of health insurance under the Affordable Care Act that are set to expire but also a rollback of Medicaid Cuts in the One Big Beautiful Bill Act and restoring funding to public media.

November 2025 may seem far down the line, but Republicans and Democrats are looking at the mid-term in November 2026 with a degree of anxiety and apprehension. The Grand Old Party is particularly conscious of the fact that it lost 40 seats in the House of Representatives in 2018 during the first Trump stint at the White House. This time around even as the political base of Trump is seen as strong within the Make America Great Again (MAGA), there is apparently a degree of concern on the general direction of foreign policy by way of tariffs and sanctions, besides the Epstein files.

The Democrats are not exactly riding high in opinion polls with a popular perception of a drift in the party in the aftermath of the November 2024 debacle. But victories in the Special Elections in the states like Virginia, Iowa, Pennsylvania, Florida and Arizona have lifted the mood, especially in seeing wins in districts Trump won strongly in 2024. And this is not to forget the excitement over the April Wisconsin Supreme Court election win that saw the active involvement of Elon Musk. Whether all these make a difference in 2026 remains to be seen.

The writer is a senior journalist who has reported from Washington DC on North America and UN

India in the wake of Trump aggression

The multipronged attack on India's exports of goods and services to the US by the Trump administration spells an era of heightened uncertainty

MACROSCAN.



CP CHANDRASHEKHAR, JAYATI GHOSH

Following a series of aggressive economic actions by the Trump administration, uncertainty hangs heavy over India's external sector. The actions started with the imposition of an unexpectedly high reciprocal tariff of 25 per cent on merchandise imports from India, ostensibly aimed at correcting the Indo-US bilateral current account deficit. This was soon followed by a further 25 per cent punitive tariff because of India's continued engagement in trade involving cheap Russian oil after the outbreak of the Ukraine war. That surprised an Indian government which had assumed that it would be favoured with sanctions of waivers by a friendly US state.

Both these actions were accompanied by commodity-specific duties on items such as aluminum products, furniture and branded pharmaceuticals that may affect Indian firms. And finally, the US announced that the fees for H-1B visa petitions, would be raised from \$2000-\$5000 to \$100,000, making it extremely expensive to hire foreign professionals. India would be significantly affected by this, since professionals from India accounted for as much as 71 per cent of such visas issued in financial year 2024.

The significance of these actions for India's balance of payments varies, and their effects would be transmitted through very different channels. The 50 per cent tariff would have an overall adverse effect on India's merchandise exports to the US, with the impact being particularly damaging for sectors such as textiles, gems and jewellery, electronics, and pharmaceuticals.

EXPORT PATTERN

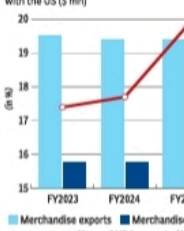
In financial year 2024-25, of India's merchandise good exports of \$87 billion, electronic goods accounted for 17.6 per cent in value followed by 11.8 per cent in the case of pharmaceutical products and 11.5 per cent for gems and jewellery. Output and employment in those sectors are bound to be affected.

There are two issues here. The first is the importance of overall merchandise exports relative to India's GDP, which stood at around 11 per cent in 2024-25, and of merchandise exports to the US, in particular, to GDP which was a low 2.2 per cent. Based on this significance of merchandise trade with the US relative to GDP, it could be argued that the impact on India growth is likely to be minimal. That, however, is the direct effect. There could be an indirect effect that operates through the balance of payments. That effect can be significant, since merchandise exports to the US accounted for between 17 and 20 per cent of India's total merchandise exports (Chart 1). And merchandise exports accounted for between 60 and 65 per cent of India's imports. This implies that a likely sharp fall in India's exports to the US can widen the trade deficit.

That in itself may not have been a matter for much concern because there were two other important sources of foreign exchange inflows on the current

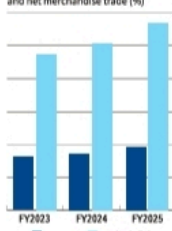
US dominance

Significance of India's merchandise trade with the US (\$ mn)



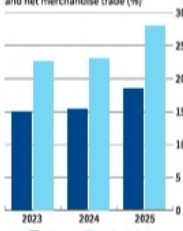
IT focus

IT services exports relative to imports and net merchandise trade (%)



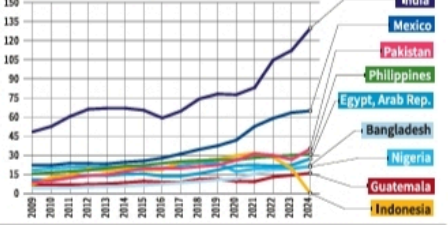
Remittance factor

Workers' remittances relative to imports and net merchandise trade (%)



India tops

Remittances inflows by country: World Bank (\$ bn)



account of India's balance of payments. One was exports of "Telecom, Computer and Information Services", which largely consisted of exports of software and IT-enabled services (hereafter IT services). Gross export revenues from IT services rose from 32 per cent of the value of merchandise imports in 2023 to 39 per cent in 2025 (Chart 2).

More importantly, inflows on account of the exports of IT services helped cover between 94 and 114 per cent of merchandise trade deficit between FY2023 and FY2025. That is, these inflows were important from the point of view of covering the merchandise trade deficit and can be a source of resilience if the merchandise trade deficit widens.

WORKER REMITTANCES

The other similar, source of strength was the inflows on account of worker remittances (with outflows under this head being minimal). These inflows amounted to between 15 and 18 per cent

of the value of merchandise imports and 23-28 per cent of the value of the trade deficit (Chart 3). India's experience in terms of the volume of flows over time has indeed been unique, as World Bank data suggest (Chart 4). This too was an important source of resilience, that help finance trade deficits with little difficulty.

Between them inflows on account of gross revenues from IT services and workers' remittances added up to between 47 and 57 per cent of merchandise imports. So even if merchandise exports took a hit from Trump aggression, the overall adverse impact on the balance of payments would have been mitigated by inflows through these two channels.

That room for manoeuvre that these two sources of inflows provided India is also now under threat. The Trump administration's decision to charge a massively hiked fee of \$100,000 for issuing H-1B visas has been justified on the grounds that these visas were being misused to hire cheap foreign substitutes for qualified American workers, depriving Americans much needed jobs. Whether conscious or not, this decision targets India, since Indian workers account for an overwhelming share of these visas that are limited in number.

This too can have two consequences. First, the current cohort of workers on H-1B visas providing on-site services will have to be replaced with more expensive substitutes. Most Indian H-1B visa holders earn less than \$100,000 in a year, but are crucial components of

India's IT services export strategy. The substitution is likely to affect the competitiveness of Indian IT service providers, and imports earnings from exports of software and IT-enabled services.

SOFTWARE EXPORTS

Of the software and IT-enabled services exports, software services and business process outsourcing services account for as much as 92 per cent. On-site support services are part of the chain used to deliver such services, so even though on-site services account only for 10 per cent of the value of exports, disruption in the provision of such services can potentially affect overall exports.

Moreover, the H-1B decision may just be a first intervention in the area. If getting US citizens more of the jobs in software services is the intention, the next step in the never-ending protectionist push on the part of the Trump administration is likely to be restrictions on imports of offshored software and IT-enabled services to the US. The United States accounted for 54 per cent of software and IT-enabled services exports from India in 2023-24. That long-term bonanza could well be under threat.

A second impact of the H-1B decision is likely to be on remittances. For quite some time now, the source regions for remittance inflows has been shifting away from the Gulf Cooperation Council countries to North America, especially the US, which accounted for 28 per cent of inflows in 2023-24. Even over the short period between 2016-17 and 2023-24 the share of remittance inflows from the US rose from 23 per cent to 28 per cent, whereas that from the UAE and Saudi Arabia together fell from 39 per cent to 26 per cent. Remittances tend to be predominantly from shorter-term H-1B visa holders who have families and non-resident accounts in India. The coming squeeze in H-1B visa use can, therefore, adversely affect remittance flows as well.

The loss of foreign exchange earnings from these sources can therefore impact India's hitherto comfortable current account balance on the external account. That could also increase uncertainty for foreign portfolio investors who have favoured India disproportionately in their choice of investment locations. And together that could spell balance of payments difficulties, currency instability and lead to slower growth.

thehindubusinessline.

TWENTY YEARS AGO TODAY.

September 30, 2005

Sponsors to pay Rs 1,237 cr to Govt for UTI AMC transfer

The Cabinet Committee on Economic Affairs (CCEA) on Thursday cleared the transfer of UTI Asset Management Company (AMC) to its four sponsors for a consideration of Rs 1,237 crore. The amount is to be split equally between the sponsors - LIC, SBI, Punjab National Bank, and Bank of Baroda. The transfer of the AMC would be effective from October 1.

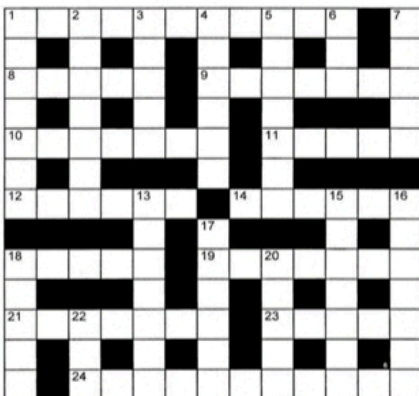
Strike hits banking operations badly

Cheque clearing and settlement operations were severely affected in Mumbai and many other centres on Thursday as bank employees joined the one-day nationwide strike called by trade unions. According to the RBI, only 57 banks participated in clearing in the Mumbai region, against a normal of 115 banks.

TRAI favours rural connectivity through mobile infra

In a move that would bring down the subsidy for the Universal Services Obligation (USO) fund from Rs 21,000 crore to Rs 6,500 crore over the next five years, the TRAI may propose a change in the way the fund is being disbursed by shifting focus by supporting individual fixed line phones at present to setting up mobile infrastructure in rural India.

BL TWO-WAY CROSSWORD 2793



EASY

ACROSS

- 01. Land tremors (11)
- 08. Called name in hotel (5)
- 09. Hangs about (7)
- 10. Flushes, blushes (7)
- 11. Cavalry weapon (5)
- 12. Proverb, adage (6)
- 14. Greatly loves (6)
- 18. Put back for a time (5)
- 19. Get better from illness (7)
- 21. Twist out of shape (7)
- 23. Not bound (5)
- 24. A restraining limit (11)

DOWN

- 01. Sends abroad (7)
- 02. In an unbending way (7)
- 03. Row of boundary plants (5)
- 04. Word in ultimatum (6)
- 05. Started blaze going (7)
- 06. Be visually aware (3)
- 07. Adhesive (5)
- 13. Feeling edgy (7)
- 15. Stuffed pasta dish (7)
- 16. Chirurgeon (7)
- 17. Kitchen shredding device (6)
- 18. Sidestep, avoid (5)
- 20. Abdominal pain (5)
- 22. Knight's address (3)

NOT SO EASY

ACROSS

- 01. Heart-breaking, shivers that are recorded on Richter scale (11)
- 08. Called for one in hotel as one quietly got older (5)
- 09. After fifty, resign perhaps? No - hangs on! (7)
- 10. Flushes the revolutionary lairs (7)
- 11. Cut it in surgery and make clean break (5)
- 12. Speaking a proverb (6)
- 14. Loves a bit of fuss and inconclusive repose (6)
- 18. Put it off for a while and bow to higher authority (5)
- 19. Get over it being concerned with book-jacket (7)
- 21. Told its form in a way that would pull it out of shape (7)
- 23. Be unsuccessful: nothing in that for the morally lax (5)
- 24. It limits one to making rice, not stir it (11)

DOWN

- 01. They are sent abroad and left in charge of sex (7)
- 02. Fit one with sails nonchalantly but unbendingly (7)
- 03. Layoff bets with priest (5)
- 04. If not, the French sun's crooked (6)
- 05. Sort to have gone ahead and got the fire going (7)
- 06. One will understand the authority of a bishop (3)
- 07. No real jewels involved in stick-up job (5)
- 13. Was apprehensive of Venus, or might have made it (7)
- 15. Academician has no end of a fiddle with Italian dish (7)
- 16. Son is about to encourage one to be a sawbones (7)
- 17. It sounds even more magnificent but will reduce it to shreds (6)
- 18. Get out of the way of a wrinkle that's useful (5)
- 20. About a cubic centimetre of oil mixed for the pain (5)
- 22. Schoolmaster in Wilde's Irish keeping (3)

SOLUTION: BL TWO-WAY CROSSWORD 2792

ACROSS 1. Docks 4. Bravado 8. Self-indulgent 10. Lower 11. Exon 12. Kiwi 16. Ozone 17. Inconsistence 19. Gastric 20. Degas  
DOWN 1. Dainherzing 2. Col 3. Skilly 4. Bedews 5. Allure 6. Amenities 7. Obtrusiveness 9. Provinces 13. Corner 14. Zodiac 15. Vetted 18. Nag



Opinion

TUESDAY, SEPTEMBER 30, 2025

# Sanctioning Chabahar

Setback for India's access to Afghanistan and Central Asia

**A**T TIME when a trade deal between India and the US is being negotiated, the Trump administration has dealt a fresh blow to India's strategic ambitions by withdrawing its sanctions waiver for the Chabahar port in Iran. This all-weather, deep draft port that sits at the mouth of the Gulf of Oman is India's gateway to Afghanistan that bypasses Pakistan. Chabahar is also part of the International North South Transport Corridor (INSTC) that enables greater access to Central Asia. India's involvement through operating Chabahar's Shahid Beheshti terminal since 2017-18 is integral to its larger drive to open up fresh trade routes as it makes for compelling geoeconomics. This is also evident in its involvement in the India-Middle East-Europe Economic Corridor. India's ambitions have suffered from the Trump administration's "maximum pressure" to isolate Iran through revoking the sanctions exception that was provided by Trump 1.0 in 2018 under the Iran Freedom and Counter-Proliferation Act for Afghanistan's reconstruction. India's involvement in Chabahar has unfortunately been bookended by the US's sanctions waiver seven years ago and its revocation effective from September 29. The ministry of external affairs has reacted to this US move, stating that it was "examining its implications". The prospect is for this facility to become a stranded asset as persons operating the Chabahar port and engaging in various related activities will now face sanctions. In December 2018, India Ports Global Limited (IPGL) took over the operations of the Shahid Beheshti terminal. In May 2024, IPGL inked a 10-year contract with Iran Ports and Maritime Organisation for equipping and operating this terminal. India's grant assistance was enhanced to \$120 million and there was also a commitment of a line of credit of \$250 million in rupee equivalent. Since 2018, the port has handled over 450 vessels, 134,082 20-foot equivalents of containerised cargo and 8.7 million tons of bulk and general cargo, according to a reply in Parliament by the external affairs minister. Indications are that work has been underway to further expand the port's capacity as well as connect it to the Iranian rail network as part of the INSTC to access markets in Central Asia. The US move is a setback for India as Chabahar also functioned as a strategic counter to the China-supported Gwadar port in Pakistan that is only 170 km away. Although India is the dominant power in the Indian Ocean—from Aden to the Straits of Malacca—these waters are also where its rivalry with China is the most intense. "At two ends of this ocean, the churn is at its sharpest today," argued India's external affairs minister, S Jaishankar. In West Asia, for instance, geopolitical tensions are escalating which seriously impact global shipping through various chokepoints like the Suez Canal and the Strait of Hormuz. With around 95% of its trade and 80% of its oil imports flowing through the Indian Ocean, India seeks unfettered and safe access through these waters as an overriding priority. So, too, does China that has invested billions of dollars in 46 commercial ports across the region, 36 of which are capable of hosting naval assets, according to data from the Council of Foreign Relations. Of course, India cannot match the dragon in chequebook diplomacy but it must build more ports in the countries that rim the Indian Ocean while seeking alternatives to Chabahar to access Afghanistan and Central Asia.

# Musk & Gates were wrong on the future of trucks

**TO HEAR BILL** Gates tell it, the electric drivetrains that have transformed the passenger vehicle industry over the past decade have no chance of repeating the trick in heavy trucks. According to Elon Musk, such a transition is inevitable—and Tesla will be leading it. Both of them are wrong. EV trucks really are on the brink of taking over—but Tesla is barely in the game. Only around 50,000 units of its monstrous cab pickup, the Cybertruck, have been sold so far. The Semi truck trailer is still essentially a demonstration model, eight years after it was first announced. Instead, it's China which is again at the cutting edge, with Europe's Volvo, Daimler Truck Holding, and Iveco Group running quite a way behind. America's hopes of playing a role are looking increasingly threadbare. The magnitude of the sales boom in China over the past 12 months has been breathtaking. In September 2020, when Musk was beefing with Gates on Twitter about his truck scepticism, just a few dozen battery-powered semi-trailers had ever been sold there. In 2024, 79,142 medium and heavy trucks were sold, according to BloombergNEF. A further 81,508 changed hands in the first half of this year alone. Sales of electric heavy trucks in August nearly tripled from a year earlier, according to First Commercial Vehicle Network, a local freight information service, giving them a share of about 26% in their segment. Some 29% of medium-sized trucks sold in China in August were plug-in variants, the China Automotive Technology and Research Center found, plus 22% of light ones. Contemporary Amperex Technology, the biggest battery maker, reckons heavy trucks will be 50% electrified by 2028, while Sany Heavy Industry thinks the figure could go as high as 80%. The implications of this go far beyond China's own borders. Because of the long distances they drive and the vast loads they carry, heavy trucks are disproportionately polluting, burning half of China's road fuel despite making up only 15% of vehicles. About 3.6% of the world's oil is consumed as diesel in China. Most goes into the same trucks that are electrifying at dizzying speed. That's going to rapidly start putting downward pressure on demand for crude. Rhodium Group, a consultancy, reckons electrified cars and trucks in China alone are going to be destroying about 1.76 million barrels a day of demand next year, equivalent to about one in forty-five barrels of crude produced. The supposed challenges of electrifying energy-hungry heavy trucks have been crucial to expectations that petroleum consumption will hold up in the years ahead, even as EVs sap usage by cars. A 2017 report by the International Energy Agency, the future of freight excluded plug-in long-haul trucks from its price analysis altogether, since it considered the technology too implausible to be worth modelling. This year's sales figures show those complacent assumptions out of the water. What's changed? Stricter fuel economy regulations which went into effect in China on July 1 are part of the explanation. So, too, is the realisation that most trucks are used inefficiently, allowing electrified variants to bite off large slices of the market that aren't carrying the very heaviest loads the longest distances. But the biggest factor is simply economics. Trucking is a low-margin industry where running costs are everything. If a technology can save you a few yuan, you'll be sentimental about adopting it. That's why a brief boom in natural-gas powered trucks, which appeared to be taking over China's logistics industry last year, is already fading. With battery prices now falling as low as \$90 per kilowatt hour, according to BloombergNEF, the value proposition of electric rigs is simply superior. Fossil fuel buns can draw fanciful projections of a bright future, but in the real world, demand is still struggling to hit the levels it reached in 2018. One after another, the supposed bulwarks of future growth—emerging markets, energy-hungry grids, construction machinery, shipping, and now trucks—are falling. Only jet fuel and petrochemicals are still holding up. For oil producers, winter is coming.

**DAVID FICKLING**  
Bloomberg



**COASTAL SAFEGUARDS**  
Union defence minister Rajnath Singh

Traditional methods are no longer sufficient, we must be ahead of criminals and adversaries by integrating artificial intelligence, machine learning-based surveillance, drones, cyber defence systems, and automated response mechanisms into our maritime security framework

**REAL POLITICS**

ITS IMPORTANCE IS RISING FOR GOVERNANCE AND THE EVOLVING VIBRANT MARKET SPACE IN A SOCIETY LIKE INDIA

# Transforming social science

**T**HE NEOLIBERAL ECONOMY has changed the nature of the State and market drastically. In this era, both need to be closer to the public for their own good. The State needs to engage with the public for delivering development and acquiring legitimacy on that yardstick, while the market needs to do so for evolving a vibrant consumer space. Prime Minister Narendra Modi's ascent in 2014 made the Indian State more impressive and ambitious in terms of delivering development and deepening democracy. It tried to reorient the State to being relatively more sensitive towards the people in this regard. With the transformation of the State and markets, the role of knowledge becomes crucial because both need to research the people and society to forge coherent linkages. In this context, knowledge becomes very important and valuable for both the transformative actors. PM Modi has described the importance of social science and researchers in various deliberations in the past decade. The New Education Policy, 2020, also accords considerable importance to teaching and researching social science in its conceptualisation and execution. However, within the western education and research systems, social science is being marginalised day by day. In the past decades, one can easily observe the decline of social science research in top universities like Chicago and Harvard in the US and Oxford and Cambridge in the UK. The University of Chicago recently announced \$100 million budget cuts in social science and humanities research and education. The US Department of Defence has also discouraged its social science research vertical in the recent past. It shows a growing crisis within the educational universe of the western world. India's case is different. It is journeying




**BADRI NARAYAN**  
Vice chancellor, Tata Institute of Social Sciences, Mumbai


towards creating a developed nation (Viksit Bharat); and for that social and development research becomes a crucial requirement for the nation and society. India has an education minister with a background in social sciences—Dharmendra Pradhan studied anthropology and maintains a close look on the social processes and transformation of India. As science dominates research circles, Indian social science is in a privileged position due to three reasons. First is our development requirements, due to which the social sector and the markets appear to be a key for quick mobility of the Indian economy as well as equal distribution of resources. Second, Modi and his policies are more centred on social aspects. Third, Pradhan, realising the need to link education and social knowledge with development, gives sufficient preference to social science research and knowledge in educational policies, and provides it with financial support. In the past few years, the Indian Council of Social Science Research (ICSSR) has received significant funding for supporting research. It has launched various social science research schemes on issues that are crucial for governance, public policy, and development. In 2024, the ICSSR had plans to

invest ₹235 crore to support social science research focussed on marginal communities, women, and various development issues. A few years ago, the ministry of education encouraged some central universities, Indian Institutes of Technology, and Indian Institutes of Management to evaluate the implementation of central government-led development schemes based on authentic data which appeared in a series called Creating Intellectual Heritage published by the National Book Trust. Indian conglomerates like Tata, Birla, Adani, and Ambani are also supporting social knowledge-based research and market-driven studies in India, and the Tata Trust has recently established a skill university in Ahmedabad. Earlier, many social scientists, intellectuals, and researchers were projecting themselves against the State as well as the markets. A section of them has realised that this new transition demands that social science researchers and institutions work closely with the state and market for the nation's development. Some of them are able to realise that critiquing for the sake of critiquing has no meaning in taking India to new heights of development—their knowledge may in fact be crucial for doing so. The importance of social science is rising for governance and the evolving vibrant market space in a society like India. The State, market, and the public need a strong, creative, imaginative, and vibrant social science research sphere. For that, social science research institutions must step up to their roles in India's development journey. Scholars and researchers should understand that their role is changing from being mere critics to positive enforcers and insight providers for the State, markets, and citizenry.

# Veiled underemployment



**SAUMITRA BHADURI**  
Respectively professor and PhD scholar, Jadavpur School of Economics, Chennai



**SHUBHAM ANAND**

To be workforce-ready by 2047, India needs a coordinated policy approach that tackles skill mismatch and persistent issues with female labour force participation rates

**INDIA'S LABOUR MARKET** is a paradox. While India recorded GDP growth of 7.8% in the first quarter of FY26, a closer look reveals that two fundamental challenges persist: a pervasive skills mismatch, and a troubling disconnect between growth and job creation. This narrative is less about a quiet revolution and more about the risk of an unfulfilled demographic dividend, demanding attention. Perhaps the most debated aspect of India's labour market is the trajectory of women's participation. India's female labour force participation rate (FLFPR) has shown a classic "U-shaped" curve, falling from 34.1% in 1999-2000 to a low of 23.3% in FY18. While a recent rebound has brought the figure up, the FLFPR in July stood at 36.9% for persons aged 15 years and above, significantly below the G20 average of around 50%. A significant portion of the rebound is driven by an increase in rural areas and in own-account and unpaid work in agriculture and unorganised sectors. The share of women workers in regular salaried jobs, the organised sector, and industry and services has fallen over the last few years. Over half of the regular salaried women workers in 2023 didn't have written job contracts or social security benefits, said a study in July by Shamim Ara and Puneet Kumar Shrivastava in *Economic & Political Weekly*. The International Monetary Fund estimates bringing more women into the formal economy could add up to 2% points to India's annual GDP growth. A significant barrier that has persisted for years is the disproportionate burden of unpaid care work, which women in India shoulder 90.5% of, compared to the G20 average of about 70.8%. This not only limits

women's economic mobility but also keeps many from the formal workforce. An International Labour Organization survey found one-third of women who reported their occupation as "domestic duties" were willing to work if jobs were available at their premises. India's low unemployment rate of 5.2% might appear promising, but it often masks a deeper problem of underemployment. Data reveal significant disconnect between the skills taught in academic institutions and those required, leaving a large portion of educated youth in roles that don't utilise their qualifications. Only 8.25% graduates are employed in roles that align with their qualifications, a study by the Institute for Competitiveness found. The problem is compounded by a stark regional disparity. States with strong industrial and services bases, such as Gujarat, Tamil Nadu, and Karnataka, continue to outperform in job creation. In contrast, Bihar, Jharkhand, and Uttar Pradesh—home to 30% of India's youth—remain trapped in low-productivity agriculture and public employment schemes. The reliance on migrant remittances is a direct consequence of this disparity, serving as a primary income source for millions of families. This skill gap has a direct impact on employment outcomes. A Mercer-Mettl survey noted that only 42.6% of Indian graduates were found to be employable in 2024. This is largely attributed to a lack of non-technical skills, even as employability in technical roles has shown a slight

improvement. This suggests that despite a booming number of graduates, a large portion of the talent pool lacks the practical and technical skills that industries require, leading to a vicious cycle of academic inflation and professional frustration. This leads to the most pressing question: what about the government's flagship "Make in India" initiative? While it has boosted manufacturing output and attracted foreign investment, its impact on job creation has been limited. The reasons are many. Modern manufacturing is increasingly capital-intensive and automated, requiring fewer people to produce more goods. So even a manufacturing boom might not generate the millions of jobs a labour-surplus economy like India needs. The Employees' Provident Fund Organisation payroll data for June showed a net addition of 21.89 lakh members, an all-time high. This is often cited as a sign of robust formal employment growth. But this data must be viewed with caution. It includes not just new jobs but also the formalisation of existing ones and re-registrations of former members. The majority of new subscribers in June were aged 18-25; a big portion of the total net addition was in "expert services" and "manpower suppliers", indicating a rise in contract-based work rather than permanent, secure jobs. India is at a critical juncture, facing a demographic deadline that demands action. With a youth bulge of 650 million under 25, this opportunity won't last forever. By 2046, the elderly will outnumber

those aged 0-15, turning a potential dividend into a burden. To be workforce-ready by 2047, India needs a coordinated policy approach that tackles both the skill mismatch and persistent issues with FLFPR. To address the deep-seated challenges in FLFPR, a fundamental policy imperative is continued investment in social infrastructure. Data-driven interventions are also necessary. For instance, the intelligent use of gender-disaggregated data can help fine-tune policies to identify and address specific, localised constraints that hold back women from the workforce, such as safety issues or lack of access to transportation. Similarly, granular skill data collection and regular skill gap analysis led by Sector Skill Councils and State Skill Missions are essential for more responsive policies. While this unified strategy is the clear path forward, its successful implementation will ultimately determine if India's demographic dividend becomes a story of triumph or a tale of lost opportunity.

## LETTERS TO THE EDITOR

**Rethinking fertilisers**  
Apropos of "Reducing risk for Viksit Bharat" (FE, September 29), many states recently witnessed shortages of urea and DAP. Delayed import and distribution thereafter impacted seeding and planting, and many farmers planted without fertilising. India depends heavily on imported raw materials for manufacturing urea. As observed, India needs to focus

aggressively on importing the required inputs such as phosphates from countries like Morocco and build up stocks. More awareness also needs to be created among farmers on the need for using organic manure, and its scope and usage need to be widened. Serious steps need to be taken towards reducing the quantum of fertiliser subsidy as it takes away a major chunk of the budgeted figure.—RV Baskaran, Pune

**Welcome revision**  
Apropos of "Course correction on IBC" (FE, September 29), the apex court's revision of its liquidation verdict for Bhushan Power & Steel (BPSL), taken over by JSW Steel's resolution under the Insolvency and Bankruptcy Code, 2016, is most welcome. It approved the ₹19,700-crore resolution, ensured the survival of BPSL, and protected the interests of

25,000 employees. The long-drawn resolution by JSW, implemented four years ago with the approval of a major chunk of creditors, was hindered by the earlier verdict for liquidation due to lapses. The new verdict boosts investor confidence in India's insolvency framework and ensures stability for the company.—NR Nagarajan, Sivakasi



SCIENCE

Scientists turn to the moon to catch spacetime's faintest music

To detect gravitational waves, a detector must be isolated from all vibrations that could obscure the elusive signals. Even the world's frontline observatories can thus only spot gravitational waves from 7 billion lightyears away. This may change if a detector is placed on the moon

Prakash Chandra

The Greek philosopher Pythagoras explained the universe using the 'Music of the Spheres', orbs on which celestial objects moved in consonance with mathematical harmonies to create a cosmic symphony of sorts.

Today, astronomers are treated to this ethereal 'music' every time they eavesdrop on the universe using radio telescopes to unravel its mysteries. The bass hum they hear is a mix of the electromagnetic signatures of the most colossal objects in the universe – neutron stars (extremely dense remnants of massive stars that exploded), pulsars (rapidly rotating neutron stars that emit beams of electromagnetic radiation from their magnetic poles), and black holes.

Perhaps the most significant notes in this melody are gravitational waves, subtle wrinkles in the spacetime continuum caused by the abrupt movement of massive objects as in cataclysmic events like merging black holes or colliding neutron stars, bending space and time. These oscillations spread out as waves at the speed of light and their low rumble can be picked up by gravitational wave detectors, which measure how the waves stretch and compress spacetime between the objects they encounter.

Warping of spacetime

Curiously, gravitational waves are only powerful on large, cosmic scales. On smaller scales they are extremely weak – so weak that they are only able to alter the distance between the earth and the moon by less than the diameter of an atom! And the farther these waves travel, the weaker they become, so that by the time they reach the earth they are almost impossible to measure.

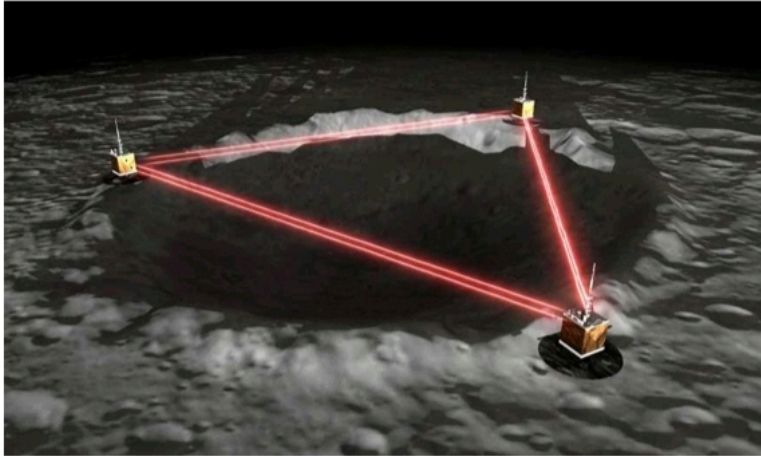
Astronomers build special instruments called interferometers that use laser light to detect gravitational waves. The Laser Interferometer Gravitational-wave Observatory (LIGO) in the US, for instance, has two L-shaped detectors, one in Louisiana and another in Washington. Each detector has a couple of 4-km-long arms. When a laser beam is sent down these arms, it is reflected back by mirrors; any delay in the reflection indicates that the light is being influenced by gravitational waves.

In 1916, Albert Einstein's general theory of relativity made two predictions. One was that stars and galaxies, because of their mass, bend light as they warp spacetime in a phenomenon called gravitational lensing. This was experimentally proved in 1919. The second prediction was the existence of gravitational waves, which was debated at length in the decades that followed as scientists wondered if these were merely mathematical constructs devoid of physical reality. In fact, Einstein himself briefly questioned their existence in 1937, suggesting that they might be theoretical artefacts and not quite what he thought initially.

Anyhow, astronomers had to wait until 2015 before gravitational waves were picked up for the first time, when the LIGO detectors in the US recorded signals emanating from two colliding black holes 1.3 billion light years away. Suddenly, cosmologists, who could until then only study the universe through electromagnetic waves or particles, had a tool with which to observe the warping of spacetime that Einstein had predicted a century ago.

'A cosmic raag'

To detect gravitational waves, a detector must be isolated from all vibrations that could potentially obscure the elusive signals. So even the best frontline gravitational wave observatories in the world – the two LIGO detectors in the US, the GEO600 in Germany, the Virgo in



An artist's image of LILA-Horizon on the moon. LILA/VANDERBILT UNIVERSITY

Italy, and the KAGRA in Japan – can only spot gravitational waves from flare-ups within 7 billion light-years from the earth.

This may be about to change as cosmologists look forward to opening a new window on the gravitational sky, on the moon. Researchers from the Vanderbilt Lunar Labs in the US plan to install a gravitational-wave detector, called the Laser Interferometer Lunar Antenna (LILA), on the lunar surface. LILA will study gravitational waves in the sub-hertz frequencies that cannot be observed by terrestrial detectors.

The moon's permanently shadowed polar regions offer ideal conditions to record gravitational waves.

"Gravity is a cosmic raag, and the moon lets us hear the notes that we cannot hear from any other place in this solar system," Karan Jani, Director of the Vanderbilt Lunar Labs Initiative and a professor of physics and astronomy, electrical and computer engineering, and communication of science and technology at Vanderbilt University, said.

"The seismic noise (on the moon) is far lower than on earth, and a natural vacuum sits right above the surface, which means far less infrastructure is required to build the detector on the moon than at earth-based observatories."

Recruiting the moon

Dr. Jani, who leads the international consortium that is building LILA, explained the project via email.

"The first phase, LILA Pioneer, can be built within this decade with the current lunar landers from American companies such as Blue Origin and Intuitive Machines, and from India's Chandrayaan program. The next phase, LILA Horizon, will require astronauts on the lunar surface for deployment."

Scientists have toyed with the idea of a moon-based gravitational-wave detector since the 1960s, when the Apollo missions and two robotic Soviet spacecraft placed five retro-reflectors on the lunar surface to reflect light back to the earth. By measuring the time light takes to travel between the moon and the earth, and knowing the speed of light, scientists have been able to calculate the earth-moon distance with great accuracy.

Such precise data has prompted some astronomers to believe that the earth-moon system itself could be a potential natural gravitational wave detector, as gravitational waves are constantly washing over the two-body system, generating small deviations in the moon's orbit, which can be tracked.

"About every 15 minutes, a gravitational wave from the collision of



There is no known technology that can access decihertz gravitational waves from the earth or in deep space, except for building a detector on the moon

KARAN JANI

DIRECTOR OF THE VANDERBILT LUNAR LABS INITIATIVE

two black holes sweeps through the earth, the moon, and even the sun," Dr. Jani said. "The effect on the orbits of these bodies is so tiny that for practical purposes it is nonexistent. But what is scientifically interesting is that the moon can resonate with some of these incoming waves, which opens a new window for the gravitational-wave spectrum."

Terra incognita

Ground-based observatories have a major handicap as they possess only a limited detection range. They are sensitive to gravitational waves within the 100 to 1,000 hertz band, which leaves the broader gravitational-wave spectrum unexplored. Other space-based interferometers such as the Laser Interferometer Space Antenna (LISA), scheduled for launch in the 2030s, may rectify this to an extent as they can be made large enough to be sensitive to signals at very low frequencies.

LISA consists of three satellites in a triangular formation that will trail the earth as the planet orbits the sun. The satellites will monitor their relative separations using lasers and sense the changes caused by passing gravitational waves so that they can be measured at lower frequencies. With an arm length nearly a million times more than LIGO's, LISA will be able to record signals in the 0.1 millihertz to 0.1 hertz range.

The search for gravitational waves on other frequencies includes the world's largest radio telescope array, the Square Kilometre Array (SKA) located in Australia and South Africa that scans the nanohertz frequency range, and the LIGO detectors in the centihertz frequency range. But the real challenge for scientists is to explore the uncharted decihertz gravitational-wave frequency range, which lies between the higher (10-1,000 Hz) band of ground-based observatories and the lower 0.1 mHz-1 Hz band of LISA.

"Decihertz gravitational wave astronomy is a new frontier which will potentially open up in the next two decades," Ajith Parameswaran of the International Centre for Theoretical

Sciences, Bengaluru, said. "Besides LILA, there are many proposals for decihertz gravitational wave detectors," he wrote in an email.

"These include the Japanese space-based DECi-hertz Interferometer Gravitational wave Observatory (DECIGO), the U.S.-led TianGo space detector initiative and the Lunar Gravitational-wave Antenna (LGWA)."

Edge of time and space

Dr. Parameswaran said Indian scientists are working on a different decihertz detector concept of their own. India's Initiative in Gravitational-wave Observations (IndIGO) is a road map to build an advanced gravitational-wave observatory, LIGO-India, in Hingoli district in Maharashtra. When completed in 2030, it will join the global LIGO network and will give a big boost to gravitational-wave astronomy in the country.

"There is no known technology that can access decihertz gravitational waves from the earth or in deep space, except building a detector on the moon," Dr. Jani said. "Gravitational waves come to us like the notes from various cosmic raags, each at a different pitch. SKA will pick up the deepest bass notes: the slow motions of massive black holes. LIGO in India and around the world listens to the high notes: the sharp bursts from colliding stars. And decihertz gravitational wave observatories such as LILA will bring the missing notes in between, so that for the first time humankind can hear the full cosmic symphony."

Gravitational-wave astronomy is still in its infancy, but it is growing fast and promises unprecedented insights into the mysteries of the cosmos. By tapping the entire spectrum of gravitational waves, astronomers can peer back to the very edge of time and space. The decihertz range, for instance, can help in studying intermediate-mass black holes which are believed to be the building blocks of supermassive black holes found at the centres of galaxies.

It is even possible for scientists to use the entire Milky Way galaxy as an immense gravitational wave detector by monitoring pulsars. When gravitational waves sweep through the galaxy, they alter the earth-pulsar distance and, along with it, the pulsar frequencies. If astronomers can tune into these minute frequency changes, they will be able to "listen" to gravitational waves from the early universe telling the story of its birth and evolution.

(Prakash Chandra is a science writer. prakashsat@gmail.com)



Logs tagged for export lined up on the shore of the Suriname River near Asidohopo, AP

Suriname pledges to protect 90% of forests

Associated Press

Suriname's government has pledged to permanently protect 90% of its tropical forests, a move conservationists say is among the most ambitious commitments to climate and biodiversity ever made by an Amazonian nation.

The announcement came during Climate Week in New York City. Foreign Minister Melvin W.J. Bouva delivered the pledge on behalf of President Jennifer Geerlings-Simons, who took office two months ago.

Some 93% of Suriname is already heavily forested. Scientists also say Suriname is one of only three countries worldwide that absorbs more carbon dioxide than it emits.

"We understand and accept the immense responsibility of stewarding over 15 million hectares of tropical rainforest in a world that is seeing her forests fall day in and day out," Geerlings-Simons said in remarks released by her office.

The pledge far surpasses the "30x30" global target – a UN-backed goal for countries to protect 30% of land and oceans by 2030. It comes weeks before COP30, the UN climate summit that will be hosted in Belem, Brazil, at the heart of the Amazon rainforest.

Suriname's government says it will update conservation laws by the end of the year to create stronger protections for its forests. The new framework could also recognize the ancestral lands of Indigenous and Maroon peoples, descendants of enslaved Africans who escaped into the rainforest, and aims to

expand opportunities in ecotourism and the growing carbon credit market.

A coalition of environmental donors has committed \$20 million to help finance the effort and support local jobs tied to forest protection.

"This sets a new standard for the Amazonian region as a whole, which has suffered from serious deforestation in recent decades," said Russell Mittermeier, chief conservation officer at Rewild, a global conservation nonprofit.

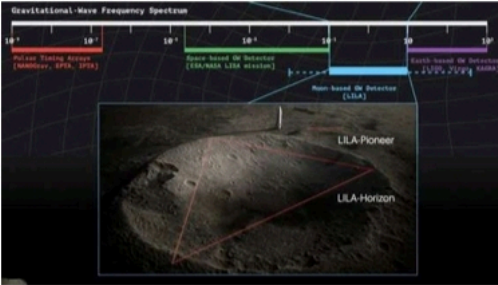
Suriname's rainforests harbour jaguars, giant river otters, tapirs, and more than 700 bird species, as well as the striking blue poison dart frog. Advocates say keeping such ecosystems intact is vital not only for local communities but also for stabilizing the global climate.

Hugo Jabini, a lawyer from Suriname's Saamaka Maroon community and a 2009 Goldman Environmental Prize winner, said the pledge will mean little unless the government addresses long-standing Indigenous and tribal land rights.

"Suriname is the only country in the Western Hemisphere where Indigenous and tribal land rights are not legally recognised," he told The Associated Press. "Without recognition, the very people who depend on the forest – and who are best placed to protect it – cannot truly safeguard it."

He warned that illegal mining, logging, and roadbuilding already threaten communities despite international court rulings ordering Suriname to halt concessions. Protecting 90% of the forest, he added, will require international support to create sustainable alternatives to extraction.

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



The proposed phases of the LILA mission. APXIV/2508.11631



An aerial view of the LIGO detector site near Livingston, U.S. LIGO LABORATORY/REUTERS





## Loyalty and Ladakh

Talks while keeping Wangchuk in jail will lack legitimacy

**T**he detention of climate activist Sonam Wangchuk under the National Security Act and the volley of allegations hurled at him by the BJP and the government mark a further deterioration of the situation in Ladakh, a sensitive border region. Mr. Wangchuk had been spearheading a movement on behalf of civil society groups demanding statehood for Ladakh and its inclusion under the Sixth Schedule of the Constitution, which turned violent on September 24. To pin the blame on him for the violence, as the government and the police appear to be doing, is unwise and flies in the face of facts. This is no way to address the issues that have led to the unrest. Mr. Wangchuk has been a supporter of the Centre's decision, in 2019, to bifurcate the erstwhile State of Jammu and Kashmir into Union Territories (UT), in the hope that Ladakh would be granted full statehood and its indigenous culture and heritage protected by inclusion in the Sixth Schedule subsequently. The BJP did make a public commitment, at least on the question of the Sixth Schedule. Developments following the carving out of Ladakh as a UT followed an opposite pattern, leaving the native population feeling alienated. The Centre did start negotiations and arrived at a tentative agreement with the groups on May 27, 2025, which unravelled for reasons that remain unclear. But the mistrust among the protesters, and with the Centre is apparent. The Centre is now planning to continue with talks even as Mr. Wangchuk is in jail in Jodhpur.

Investigations have been launched against SECMOL, a school he co-founded, though he is not associated with its management anymore. The Centre has revoked its FCRA licence for alleged financial irregularities. He has denied all allegations and welcomed any investigation. He has said the unrest stemmed from six years of unkept promises, especially on job creation and constitutional safeguards. The Opposition, led by the Congress, has termed Mr. Wangchuk's activism as peaceful and Gandhian. The use of the CBI and ED to overcome a political situation, the violence notwithstanding, betrays a lack of statemanship. The situation is such that any agreement with other interlocutors while Mr. Wangchuk remains detained will carry little legitimacy in the eyes of the world or Ladakh. It is also extremely counterproductive to accuse the people or the leaders of the movement in Ladakh of disloyalty to the nation, as many allies of the BJP are doing brazenly. The Centre should be more considerate toward the concerns of Ladakh, and such an approach will advance national security and integration much more than any strong-arm measures can achieve in the short term.

## Bitter victory

India's attitude to playing sports with Pakistan makes no sense

**S**port is always laced with politics, but rarely does it lose its character as it did in cricket's Asia Cup 2025. Under warm Dubai skies, India reiterated its continental dominance. The defending champion retained the Asia Cup after Sunday's final swung India's way when Pakistan imploded. The western neighbour was placed at 84 for one in 94 overs but then lost nine wickets adding just 62 while the Indian spinners prevailed. But India did not have it easy. Chasing 147, its top three were back in the hut while the score read a mere 20. Pakistan again had a chance but India found new heroes in Tilak Varma, Sanju Samson and Shivam Dube. Tilak's match-winning substation 69 further highlighted the rich vein of talent coursing through India's cricketing heart. India's five-wicket triumph with two deliveries to spare capped a fine Asia Cup campaign in which all games were won and arch-rival Pakistan was humbled thrice. But this was a victory sullied by the antics of the Indian squad. Suryakumar Yadav's men refused to shake hands with their Pakistani counterparts all through the championship; an even more obnoxious trait was revealed when the victors refused to accept the trophy from Mohsin Naqvi, the Asian Cricket Council (ACC) president, the Pakistan Cricket Board chief, and also Pakistan Interior Minister. The scars of the Pahalgam terror attack and the angst over Operation Sindoor may linger but this was poor behaviour on the field.

If India felt strongly about playing against Pakistan, then the matches should have been skipped. This lame excuse of playing the neighbour only in multi-team tournaments, while avoiding bilateral fixtures, does not cut ice. Broadcast revenues govern these strategically placed India-Pakistan clashes in all tournaments, conducted by the International Cricket Council or the ACC. India-Pakistan contests always had an edge and it was inevitable due to Partition-trauma and multiple wars. Still in the 1980s, Dilip Vengsarkar and Javed Miandad would go hard against each other on the turf and would have a meal together at night. Punjabi poe, a shared cuisine and even common explosives forged a bond between players split by the Wagah border. But in these times of shrill nationalism, sport has become part of the external noise. In one fell swoop, Suryakumar's men and petulant Pakistani players have shown that sport can also burn bridges. This was unnecessary. While politics cast a dark shadow on the tournament, India still has some internal assets to cling to. Suryakumar may have made some smug remarks in press conferences but he cannot hide his poor form in this tournament. The leader cumulatively scored a mere 72. This Indian T20 unit is still a work in progress even as it seizes tournaments.

**F**rom harbouring Osama bin Laden in a house that was just a stone's throw away from its own military academy, to training and backing groups such as the Lashkar-e-Taiba (LeT) and Jaish-e-Mohammad (JeM), Pakistan's role in fuelling cross-border terrorism is no longer an allegation. It is a matter of record. The 2008 Mumbai attacks, the 2019 Pulwama bombing and the attack on tourists in Pahalgam on April 22, 2025, are events that bear the unmistakable marks of a terror infrastructure being nurtured across the border. In response to the Pahalgam attack, India launched Operation Sindoor, striking at the roots of this terror network along the Line of Control. Pakistan faces growing accusations not only from India but also from Afghanistan to Balochistan – of fostering regional instability, crushing dissent and deepening unrest.

Just a few days ago, India delivered a sharp rebuttal to Pakistan Prime Minister Shehbaz Sharif's speech at the United Nations General Assembly. Therefore, when a nation long accused of harbouring terrorists is given the reins of global counter-terrorism efforts – despite clear evidence of its terror links – the world should pause and ask questions.

In June this year, in a decision that sparked disbelief, Pakistan was to lead two critical United Nations bodies: the Taliban Sanctions Committee of the United Nations Security Council (UNSC) and as the vice-chair of the Counter-Terrorism Committee of the 15-nation UN body. This development also came at a time when Pakistan's credibility on counter-terrorism was under scrutiny. On July 1, Pakistan also officially assumed the Presidency of the UNSC for the month of July.

In the past, the UN's decisions to make Libya as the chair of the UN Human Rights Commission and Saudi Arabia as the chair of UN Women's Rights Commission have come under scrutiny. In May 2025, the International Monetary Fund (IMF) approved a \$1 billion loan to Pakistan, despite concerns over its potential misuse for terror financing. These developments expose significant loopholes in the UN's foreign policy and raise questions about the UN's commitment to combating global terrorism.

### Terror shelter

The Pahalgam attack highlighted Pakistan's continuing role as a haven for terror groups. Hafiz Saad, a UN-designated terrorist, has made several public appearances in recent years despite serving a sentence for terror financing. He has often been seen at terror launchpads in Pakistan-Occupied Kashmir (PoK) but is "in custody" on paper. The presence of Pakistani



**Gauri Mishra**  
is a highly decorated naval officer with a career of around two decades in the Indian Navy, from where she retired as Commander. She is also a motivational speaker, author, skydiver and an international track cyclist representing India

The world should pause and ask why Pakistan, a nation with evidence of terror links, has been allowed to oversee global counter-terrorism efforts at the United Nations

Army personnel, the Pakistani police and members of civil bureaucracy at the funeral procession of terrorists killed in Operation Sindoor, further indicates Pakistan's open support for terrorist organisations.

The inclusion of Pakistan in the UN's counter-terrorism mechanisms exposes troubling gaps and issues with the global body's moral and strategic compass.

First, Pakistan's long-standing support for terror groups such as the LeT and JeM, directly contradicts the objectives of the Counter-Terrorism Committee. There is adequate evidence linking Pakistan's military and Inter-Services Intelligence (ISI) to logistical and tactical support for terror movements. Yet, the UN prioritised geopolitical considerations over moral and security imperatives.

Second, the UN's selection process for committee leadership lacks stringent vetting for a country's compliance with counter-terrorism standards. Pakistan's removal from the Financial Action Task Force (FATF) grey list in October 2022, despite ongoing concerns about terror financing, exemplifies this leniency.

Third, the decision also reflects a broader trend of geopolitical manoeuvring within the UN, where powerful nations support Pakistan's elevation to secure economic or strategic interests. This bias compromises the UN's impartiality and risks legitimising Pakistan's duplicitous stance on terrorism.

Fourth, by rewarding duplicity with leadership, the UN sends a dangerous message: state-sponsored terror can be overlooked if packaged diplomatically.

The IMF loan to Pakistan – part of a \$7 billion Extended Fund Facility – fuelled controversy despite India abstaining from the vote. The risk of funds being misused for terror activities was cited. However, the timing of the loan, just weeks after the Pahalgam attack raised ethical questions on the UN's commitment to combat global terrorism.

### The UN's dangerous gamble

In May this year, the Pakistan government announced a compensation of \$4 crore to the families of terrorists, including relatives of JeM chief Masood Azhar, who were killed in Indian strikes. When a nation equates terrorists with martyrs, one does not need to imagine its commitment to peace.

The UN's decision to entrust Pakistan with key counter-terrorism roles, despite its explicit ties to terrorism, casts a shadow over UN's integrity and suggests a troubling disconnect between the UN's stated goals and its actions.

Such moves will only help Pakistan legitimise

its narrative and project itself as a responsible global actor in counter-terrorism. It will also undermine India's efforts to portray Pakistan as a state sponsor of terrorism. Pakistan could shape narratives around regional stability, potentially deflecting blame for regional terrorism on India, particularly in the context of Balochistan.

Pakistan's role as vice-chair in the Counter Terrorism Committee allows it to influence global counter-terrorism policies. This may have serious repercussions for India's push to bring Pakistan-based terrorists under UN sanctions. Pakistan could also derail India's growing diplomatic ties with the Taliban.

### Counter-measures by India

India's failure to block Pakistan's appointments, despite its outreach to most UNSC members following the Pahalgam attack, signals a diplomatic challenge.

In counter strategies, India must leverage its strategic alliances with other UNSC members to counterbalance Pakistan's influence.

That Pakistan is at the centre of attention at the White House also raises doubts on the U.S.'s commitment to combat terrorism for the sake of trade and business.

India should actively participate in discussions at crucial UN bodies to highlight Pakistan's history of harbouring terrorists. These committees are operated by consensus and India's growing global influence can limit Pakistan's ability to push biased agendas. It is essential that India and its allies monitor Pakistan's role and push for periodic performance reviews and stringent accountability.

India should aim to deepen its ties with the Taliban regime – humanitarian aid missions in Kabul is one possibility – to counter Pakistan's influence in the Taliban Sanctions Committee.

India must proactively pursue an international campaign that engages the global media, academia and diaspora, exposing Pakistan's terror links and pushing for more accountability.

Pakistan's enhanced diplomatic position is likely to encourage asymmetric warfare, infiltration and cyber-attacks. Therefore, India must strengthen its national security and intelligence networks.

The Indian government's silence on the appointments suggests a cautious approach, but proactive diplomacy will be crucial to maintain India's narrative on the global stage. The world must be alert because what begins as a seat at the table can turn into control over the agenda. The real danger is not about Pakistan at the high table. It is the world pretending that it does not matter.

# 'SSTC' is more than a diplomatic phrase

**W**ith just a third of the sand left in the hourglass to achieve the 2030 Agenda for Sustainable Development, urgency defines now. Nowhere is this more evident than in the evolution of South-South and Triangular Cooperation (SSTC), recognised each year by the United Nations on September 12 as the UN Day for South-South and Triangular Cooperation. This date also marks the anniversary of the 1978 Buenos Aires Plan of Action (BAPA), which laid the foundation for technical cooperation among developing nations. More than a framework for assistance flows, BAPA enshrined principles of solidarity, mutual respect, and shared learning. Over the decades, these principles have become cornerstones of South-South cooperation, more relevant now as the global order has shifted and demand for new partnership models has intensified.

SSTC has emerged as a vital complement to traditional aid in a world grappling with geopolitical conflicts, climate change, and widening inequalities. With cost-effectiveness, replicability, and contextual relevance, SSTC offers better returns on investment, particularly as funding for humanitarian and development sectors declines.

### India's role and philosophy

India's development journey embodies the philosophy of *Vasudhaiva Kutumbakam* – the world is one family. India is uniquely positioned to champion SSTC, as a leading voice for sovereignty, inclusion and mutual respect; as a nation with one of the world's largest food safety nets and one which transitioned to a food-surplus economy.

India's contributions are wide-ranging: hosting the Voice of the Global South Summits; leading efforts during its G-20 presidency to secure permanent membership for the African Union; establishing the Development Partnership Administration in the Foreign Ministry; and the impactful Indian Technical and Economic Cooperation programme, which built capacity in



**Yami Rao**  
is India's Ambassador to Italy



**Elisabeth Faure**  
is Country Director, World Food Programme in India

South-South and Triangular Cooperation (SSTC) is a pathway to a more equitable and sustainable future

more than 160 countries. India launched the India-UN Development Partnership Fund, promoted its digital public infrastructure models such as Aadhaar and UPI globally, and continues to strengthen collaboration through several multilateral platforms.

Equally important, India has become a hub of innovation – developing tailored, cost-effective and locally appropriate solutions across digital transformation, climate resilience, health systems and sustainable financing.

In this context, India's productive partnership with the World Food Programme (WFP), a UN agency, is a shining example of a joint development of innovations and solutions that unlock public investment and scale best practices across India. Over six decades, India was a testing ground for WFP initiatives with global relevance, deploying digital tools, improving food distribution and advancing climate-resilient farming best practices. India and the WFP worked together to pilot notable Indian innovations such as the Annapuri or Grain ATM, optimisation of the national supply chain within the food public distribution system, the women-led Take-Home Ration programme, and the national rice fortification project. These initiatives, which improved food security domestically, also provide replicable models for other developing nations.

### Redefining partnerships

The complexity of today's challenges demands diversified partnerships. Triangular cooperation, linking developing countries with traditional and emerging donors, amplifies good practices, unlocks resources, and fosters trust and mutual accountability. Equally, partnerships must extend beyond governments to civil society, the private sector, and grassroots communities. Such collaboration creates more holistic, sustainable, and people-centred development models.

SSTC also provides a better return on investment, being frugal and replicable across similar contexts. This is a critical imperative in

view of the reduction in funding for humanitarian and development sectors.

Over the past three decades, 47 governments have contributed to the UN Fund for South-South Cooperation, supporting initiatives that have reached more than 70 countries and benefited people in 155 nations. Since its establishment in 2017, the India-UN Development Partnership Fund has financed over 75 transformative, demand-driven projects across 56 developing countries, particularly in Least Developed Countries and Small Island Developing States.

In 2024, the WFP mobilised over \$10.9 million from Global South countries and the private sector to support SSTC projects aligned with Sustainable Development Goal 2: Zero Hunger. Recent India-WFP initiatives such as the United Nations Sustainable Development Goals pool funds for rice fortification and supply chain optimisation in Nepal, and a UN India Development Fund project in the Lao People's Democratic Republic, demonstrate a shared commitment to translating commitments into action.

The theme for UN Day for South-South Cooperation 2025 – "New Opportunities and Innovation through SSTC" – captures the challenge before us. Real progress requires strong institutions, adequate financing and the courage to innovate. It also means investing in knowledge-sharing platforms, expanding access to finance, and strengthening accountability and learning mechanisms. India is cementing its leadership by enhancing regional and global cooperation in food security, nutrition, and resilience.

### A new spirit of partnership

The world needs a renewed spirit of partnership – one that values contributions from all countries, fosters equality, and prizes innovation. SSTC is more than a diplomatic phrase. It is a tool for transformation, a lifeline for billions, and a pathway to a more equitable and sustainable future.

## LETTERS TO THE EDITOR

### Political rally at Karur

The stampede in Karur, Tamil Nadu, raises several questions. Should not the police have demanded that the Tamilaga Vetri Kazhagam have its meeting in an open ground? The root cause is also the deep-rooted 'cinema craze' that Tamil Nadu is known for. The visual media did not exactly cover itself in glory – in its 24x7 coverage,

for instance, there was a lack of sensitivity. There were constant visuals of a two-year-old child and gory images of other victims.

**A.V. Narayanan,**  
Chennai

As a senior citizen, I am distressed by the way people of this State have become blind followers of cine actors. The frenzy to have 'just a glimpse' of the

actor-politician resulted in the loss of precious lives. Senior citizens like me dread to think of the kind of State we are going to leave behind for future generations.

**Tharicus S. Fernando,**  
Chennai

**In Dubai**  
Congratulations to the Indian cricket team for winning the Asia Cup

['Sport' page, September 29]. Of course, the final was a cliffhanger, with Tilak Varma holding fort at one end and stitching together crucial partnerships with Sanju Samson and Shivam Dube. For Pakistan, though the opening partnership in the middle order succumbed to the guiles of Indian spinners led by Kuldeep Yadav. Initially, it was thought that Pakistan would race up to a

big score. But that was not to be.  
**S. Sankaranarayanan,**  
Chennai

The BCCI should have considered who would be presenting the trophy especially when the Asian Cricket Council chief, who is the head of the Pakistan Cricket Board and also a Minister, was present. It was only in the fitness of things

that the highest dignity was expected to present the trophy. Subsequently, if Mr. Naqvi was wrong, so were the Indian players. Considering the unpleasantness, the Asia Cup will be remembered for all the wrong reasons.  
**V. Lakshmanan,**  
Tiruppur, Tamil Nadu

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



## Bridging the generation gap

The phrase 'generation gap' evokes images of an unbridgeable chasm; yet, in India, it has long been softened by the enduring ties of family and tradition. Today, however, as the country stands at a demographic crossroads, one must ask whether these bonds will withstand the pressures of change and the digital boom, or fray under the weight of shifting aspirations and realities.

India's population is ageing at a pace that would have seemed improbable only a generation ago. At least 10% of Indians are now above 60, a figure projected to rise to nearly 20% (one in five Indians) by 2050. The implications go far beyond mere numbers. They touch upon questions of identity, family construct, support systems, and the lived experience of both the young and the old.

### Emotional disconnect

A recent study by HelpAge India, titled 'Understanding Intergenerational Dynamics & Perceptions on Ageing', reveals a paradoxical landscape. The survey covered more than 5,700 respondents (70% youth in the 18-30 age group and 30% of the elderly in the above-60 age group) from 10 cities across India.

Young Indians, when asked about their elders, are quick to invoke words such as 'wisdom' (51%) and 'respect' (43%); yet, just as readily describe them as 'lonely' (56%) and 'dependent' (48%). This duality suggests a sharp disconnect between intention and action – a phenomenon perhaps best captured in the oft-repeated lament of elders: "We are told the plan, not asked."

The result is an emotional disconnect that data only begins to illuminate. Over half of the elderly respondents (54%) report negative feelings about ageing, often rooted in a sense of invisibility. Technology, rather than serving as a bridge, frequently becomes another battleground. "Children don't sit



**Kiran Karnik**  
Chairperson,  
HelpAge India



**Rohit Prasad**  
CEO, HelpAge India

and talk any more. They are always on their phones," is another sentiment frequently voiced by elders. While 78% of the youth assume elders lack interest in digital tools, 71% of elders cite impatience and lack of support from the young in enabling them use digital tools as obstacles.

### Forging bonds

Yet, beneath these surface tensions lies a foundation of hope. Both generations, when pressed, express faith in the possibility of greater understanding. Nearly half of elders (49%) and a majority of the youth (57%) believe mutual understanding can "definitely be improved." Even more telling is their agreement on the remedy: 84% of elders and 86% of the youth see spending more quality time together and engaging in open, respectful conversations as key connectors to understanding each other. This insight resonates with the traditional Indian ethos of shared meals, rituals, and celebrations. Indeed, it is in these moments that belonging is forged and loneliness kept at bay.

The anxieties of age, it turns out, are strikingly similar across generational lines. Loneliness looms largest, cited by 69% of the youth and 68% of elders, followed closely by concerns about health and financial insecurity. The ideal of a family-centred living remains robust with nearly 9 in 10 youth (88%) expecting to live with family in old age. This mirrors the aspirations of their elders – 83% of them currently do, or plan to, live with family. Such convergence underscores the continued relevance of inter-generational households, even as urbanisation and migration test their resilience.

Why do these bonds matter? Beyond sentiment, they serve as a bulwark against the atomisation that afflicts many modern societies. For the 47% of elders who identify loneliness as their chief burden, family is both refuge and anchor. Moreover, the exchange is mutual: while elders offer wisdom and practical

childcare, the youth provide guidance through the labyrinth of modernity and technology, according to respondents of the study. When approached with patience, technology itself can become an enabler. During crises, most recently the COVID-19 pandemic, these connections have proven invaluable, compensating for the gaps in formal care systems.

### Intention to action

However, translating good intentions into sustained action requires more than nostalgia. Digital inclusion, for instance, must move beyond access to embrace patience and tailored learning. Notably, 75% of young Indians express willingness to support elder initiatives, though few structured opportunities exist for meaningful interaction. Community models that extend support beyond the nuclear family are essential, especially as the notion of home itself evolves. While the majority still aspire to family-based care, 30% among the young consider care homes as an alternative, compared to just 19% of elders, signalling the need for thoughtfully designed intergenerational spaces that foster, rather than fragment, connections.

Education, too, has a role to play. Building empathy, care and literacy about ageing across the lifespan can help counter ageist attitudes and prepare society for the coming transformation. Policy frameworks must adapt, supporting families while innovating new models of care.

India's demographic shift presents a choice: to view ageing as a challenge to be managed, or as an opportunity to reaffirm and reinvent the inter-generational connect that has long been our strength. The evidence suggests both peril and promise. It is up to us – as individuals, communities, and policymakers – to ensure that the bridges between generations are not only preserved, but strengthened for the years ahead.

## Include migrants in climate policy

Kerala's migrant workers are among the most affected by climate change

### STATE OF PLAY

**Aysha Jannath**  
**Sofia Juliet Rajan**

Kerala has been experiencing erratic weather patterns, with an early heatwave in February and heavy rainfall later, all emerging signals of climate change. According to the Kerala State Action Plan on Climate Change (KSAPCC), average temperatures could see a 1°C-2°C rise by 2050, under moderate to heavy emissions.

The impacts of climate events, however, are never evenly experienced. Climate vulnerability depends on a person's socio-economic conditions and adaptive capacity. Kerala's migrant workers (estimated to number 28 lakh-31 lakh, according to the Kerala State Planning Board or KSPB) are among the most affected.

The Centre for Migration and Inclusive Development (CMID) estimates that about 35 lakh migrant workers contribute ₹32,000 crore annually to local income through labour, rent, food, and other expenses. A 2020 CMID study of nearly 400 migrants found that most work in construction (48.6%) and plywood manufacturing (27.2%) – jobs involving prolonged exposure to heat. Many reported being denied rest breaks and clean toilets, forcing the workers, especially women, to limit water intake. This leads to dehydration, fatigue, hypertension, and chronic kidney disease.

The harshest heat is endured at home. Migrant housing is often cramped, poorly ventilated, and dilapidated, designed for profit rather than liveability. Multiple families share small houses; even stairwells and terraces are converted into makeshift homes.



These spaces trap heat, making sleep difficult. During monsoon, they leak and flood. Housing conditions are worsened by the lack of clean water, waste collection, and functional toilets. Migrants pay inflated rents and high prices for essentials, while stagnant wages leave little savings to recover from climate shocks. An Indian Institute of Human Settlements (IIHS) study found that some landlords monitor tenants, restrict visitors, or prohibit cooking native foods, stifling community networks that could build resilience in new environments.

Kerala has shown inclusive intent and response during emergencies. During COVID-19, it was among the first States to set up relief camps, health services, distribute food for migrants, and ensure multilingual communication through pamphlets and alerts. The State has also adopted a progressive approach to migrant welfare. The Interstate Migrant Workers Welfare Scheme, Aawaz, and Apna Ghar provide social security, healthcare, and housing. Educational initiatives such as Roshni and Jyothi support migrant children's schooling and integration. Yet, from a climate perspective, interventions are inadequate. An IIHS review found that most social support interventions are climate-blind, while climate interventions are migrant-blind.

The KSAPCC, though one of

India's strongest, does not mention migrants. State guidelines advise against outdoor labour during peak afternoon hours, but enforcement is inconsistent. During the 2018 floods, many migrants were told to return home rather than being sheltered in relief camps. Some received free tickets, but others had to travel through flooded routes. For those who were moved to relief camps, instances of segregation were also reported. This reveals gaps in addressing migrant workers' climate vulnerability.

Building inclusive climate resilience requires coordinated action of government, employers, and communities. Local governments must enforce rental housing standards that ensure heat-resistant materials, ventilation, and basic services. They should profile migrant settlements to identify gaps for integration into local development plans. Mandatory rental registration and inspections can ensure compliance, while subsidies may encourage owners to upgrade housing. Community campaigns can promote dignified living conditions. The Labour Department must enforce the 12-3 p.m. summer work break through inspections and penalties, and ensure access to drinking water, rest areas, and gender-segregated toilets at worksites, with protections against wage cuts or job loss. Disaster Management Authorities should deliver multilingual alerts, initiate outreach through trusted community channels, and include migrants in relief planning. The KSPB should include migrant perspectives in shaping climate policy.

Aysha Jannath and Sofia Juliet Rajan are researchers at IIHS, Bengaluru

## More women employed in agriculture, but half of them are unpaid

Global trade trends, technology, and land and labour reforms can help bridge the gap

### DATA POINT

**Shravani Prakash**  
**Anjhana Ramesh**

Women-led development has been recognised as a structural game-changer for advancing India's economic ambitions, yet its full potential remains under-leveraged. Nowhere is harnessing this potential more urgently than in the agriculture sector, the backbone of India's economy and the largest employer of its women.

Despite their growing presence on farms, women's contributions remain systematically unremunerative. By leveraging recent shifts in trade and technology, India has an unprecedented opportunity to unlock pathways that recognise women as equal partners in agricultural transformation.

In the past decade, structural shifts in the Indian workforce have drawn rural men into higher-paying non-farm jobs, leaving women to replace them to do the agricultural work. As a result, women's employment in agriculture surged by 135%, and they now account for over 42% of the sector's workforce. Two out of every three working women are now in agriculture.

Yet, this rise has come with diminishing returns. Nearly half of the women in agriculture are unpaid family workers, with their numbers jumping 2.5 times from 23.6 million to 59.1 million in just eight years (Chart 1). As a result, today, one in three working women in India is unpaid. In States such as Bihar and Uttar Pradesh, more than 80% of women workers are in agriculture, and over half of them receive no wages (Map 2).

Much of this invisibility stems from systemic inequities. Women are not officially recognised as farmers, own only 13-14% of land holdings, and earn 20-30% less than men for equivalent work. Asset ownership, decision-making power, and access to credit and go-

vernment support remain male-dominated, trapping women in low-value activities.

As a result, women's greater participation has not translated into higher income for the economy, as agriculture's share of the national GVA fell from 15.3% in 2017-18 to 14.4% in 2024-25. Therefore, the 'feminisation of agriculture'; has, in a way, reinforcing inequities rather than enabling women's economic empowerment.

Global trade trends are opening new windows for women's economic inclusion in agriculture. The India-U.K. Free Trade Agreement (FTA), for example, is projected to boost Indian agricultural exports by 20% within three years, granting duty-free access to over 95% of agricultural and processed food products. From rice, spices, and dairy to ready-to-eat meals, Indian producers will benefit from premium market access, with safeguards in place for sensitive sectors. Many of these export-oriented value chains employ a significant share of women (Chart 3). If FTA-embedded provisions for women, such as training, credit access, and market linkages, are catalysed, it could enable women's transition from farm labourers to income-generating entrepreneurs.

The greatest opportunity lies in enabling women to move from unpaid, low-value tasks into higher-margin segments such as processing, packaging, branding, and exporting. With global demand rising for organic products and superfoods, India's value chains for tea, spices, millets and certified organic produce are poised for expansion – sectors where women are already strongly represented. Geographical Indications, branding initiatives, and support for meeting export standards can help women producers shift from subsistence farming toward premium, value-added product markets.

Without targeted measures, women risk being excluded from the export-led opportunities emerging in Indian agriculture. Digital inno-

vations can play a decisive role in bridging this gap. Platforms such as e-NAM, mobile-based advisory services, voice-assisted applications, and precision agriculture tools are already connecting women to markets, knowledge systems, and financial services. These solutions help formalise women's labour while expanding access to schemes, credit, and fair pricing.

However, these benefits are contingent on overcoming structural barriers such as low digital literacy, language gaps, and limited access to affordable devices. Tackling these challenges requires collective action by all ecosystem actors – government, private sector, NGOs, self-help groups, and Farmer Producer Organisations (FPOs). Encouragingly, promising models are emerging. AI-enabled solutions such as the government's BHASHINI platform and Microsoft-A4Bharat's Juglabadi are extending multilingual, voice-first access to government services. L&T Finance's Digital Sakhi programme has trained rural women in digital and financial literacy across seven States.

At the State level, Odisha's Swayam Sampurna FPOs showcase how technology can position women farmers at the forefront of export competitiveness. The Jhalawari Mahila Kisan Producer Company in Rajasthan leverages digital tools for direct sales and branding. Multi-stakeholder training programs for women farmers in Assam's tea sector focus on diverse areas. It is important to scale up and emulate these platforms.

To transform women's role in agriculture, land and labour reforms are equally vital. Policies must recognise women as independent farmers by promoting joint or individual land ownership, which in turn strengthens their eligibility for credit, insurance, and institutional support.

Shravani Prakash and Anjhana Ramesh are with ICRRI's EPWD (Economic Policies for Women Led Development) Programme

### All work, no pay

The data for the charts were sourced from the Periodic Labour Force Survey (PLFS), 2023-24



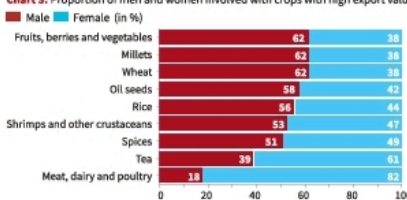
Chart 1: The number of women in the agriculture sector who are unpaid family workers



Chart 2: Proportion of women (in %) in agriculture who received no wages according to the Periodic Labour Force Survey (PLFS), 2023-24

One in three working women in India is unpaid. In States such as Bihar and Uttar Pradesh, more than 80% of women workers are in agriculture, and over half of them receive no wages

Chart 3: Proportion of men and women involved with crops with high export value



### FROM THE ARCHIVES

## The Hindustan

FIFTY YEARS AGO SEPTEMBER 30, 1975

### U.S. technicians aided Israel in 1973 war: Sadat

Cairo, Sept. 29: The Egyptian President, Mr. Anwar Sadat, said here yesterday he accepted the ceasefire ending the October 1973 war with Israel when the U.S. sent new weapons and technicians into battle against Egypt and "the Soviet Union was on my back."

Speaking at a meeting of Parliament and the ruling Arab Socialist Union, to mark the 5th anniversary of the death of President Nasser, Mr. Sadat revealed for the first time that U.S. technicians had aided Israel in the 1973 war.

"When I accepted the ceasefire on October 22, 1973, and I want our brothers in the Syrian Baath Party to hear this, I was facing both the Americans and the Jews – America with its strength and its new weapons that had never before left the United States. They brought the weapons and (American) experts and entered the battle in the days of the breakthrough. This was a reference to the Israeli thrust over the West Bank of the Canal."

"Just as America and Israel were in front of me, the Soviet Union was on my back," Mr. Sadat said. "The air brigade which brought in weapons was bringing weapons that should have been delivered in 1969. These weapons had been requested by Mr. Nasser, but the Russians did not deliver them because they wanted to punish him as he had refused to stop the war of attrition at their request."

Describing the presence of Soviet personnel in Egypt as a "nightmare" which he removed when he expelled them in July 1972, Mr. Sadat said pre-war Soviet estimates of Egyptians' performance and losses on the battle field proved completely erroneous.

A HUNDRED YEARS AGO SEPT. 30, 1925

### Malabar: A treasure trove case

Calicut, Sep. 27: The Ernad police are now investigating a case in which a Moplah maistry employed in the construction of the Shornur-Nilambur Railway came in possession of a treasure trove in the act of doing earth work. The trove contained some ancient gold coins with the symbol of an elephant on one side, each weighing 10 and a half panams. The police are reported to have succeeded in recovering from the Moplah maistry a portion of the coins and produced the same before the Sub-Magistrate of Tirurungudi.



# Text & Context


THE  HINDU

## NEWS IN NUMBERS


### Number of Indians lacking adequate mental healthcare

**200** In million, Indians diagnosed with mental health conditions lack adequate care, with treatment gaps reaching up to 95%, as per the India Mental Health Alliance. The group warned that unaddressed conditions could cost India over \$1 trillion by 2030. 


### Number of complaints received by national child rights panel

**1** In lakh. The National Commission for Protection of Child Rights (NCPCR) received close to 1 lakh complaints between April and December 2024, the Women and Child Development Ministry said. The largest share, over 39,500 cases, related to juvenile justice and care of neglected or differently abled children. 


### Tourist spots in Kashmir reopened after Pahalgam attack

**7** The Jammu and Kashmir administration reopened seven tourist destinations in the valley that were shut after the April 22 Pahalgam terror attack, which killed 26 people. Sites like Aru Valley, Rafting Point Yanner, Akkad Park, Padshahi Park and Kaman Post are now accessible to visitors. 

### Investment approved by the DJB to supply treated sewage water

**90** In crore. The Delhi Jal Board (DJB) has approved a ₹90 crore project to supply treated sewage water for horticulture across the city, Water Minister Parvesh Verma said. Pipelines will carry water from sewage treatment plants to large parks, central verges, and green areas. 

### Cost of two railway projects connecting India to Bhutan

**4,033** In ₹ crore. The plan includes a 69 km Kokrajhar-Gelephu line and a 20 km Banarhat-Samtse line, to be completed in four years. There will be six stations between the two cities. 

COMPILED BY THE HINDU DATA TEAM

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# Why was X's 'censorship' challenge rejected?

Why has the Karnataka High Court dismissed X Corp's petition against the Union government's Sahyog portal? What is the function of this portal, operated by the Indian Cybercrime Coordination Centre? Has X complied with similar rules in other countries?

## EXPLAINER

Aaratrika Bhaumik

**The story so far:** The Karnataka High Court has dismissed X Corp's petition against the Union government's Sahyog portal, which enables content takedown under Section 79(3)(b) of the Information Technology (IT) Act, 2000. The ruling marks a setback for X's (previously Twitter) months-long litigation and endorses the government's content regulation framework, which has already been adopted by 38 intermediaries, including Microsoft, Amazon, Google and Telegram. Delivering the verdict, Justice M. Nagaprasanna said that social media "cannot be left in a state of anarchic freedom" and that India's digital space could not be treated as a "mere playground where information can be disseminated in defiance of statutes."

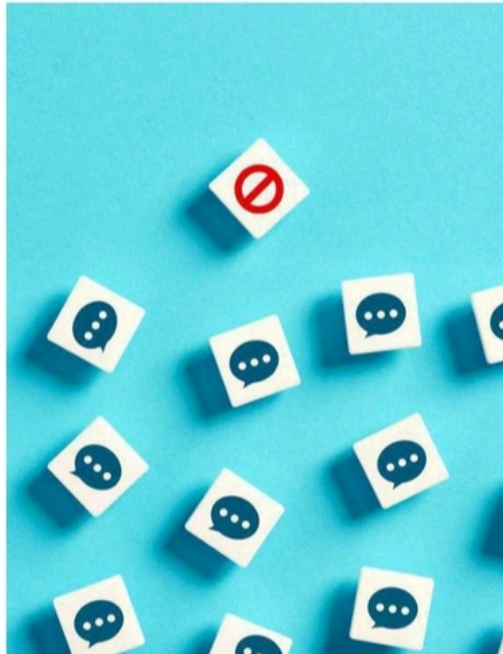
**How does the Sahyog portal operate?** Launched by the Union Ministry of Home Affairs (MHA) in October 2024, the Sahyog portal is operated by the Indian Cybercrime Coordination Centre (I4C) as a centralised platform for issuing takedown orders to internet intermediaries, including telecom operators, internet service providers, social media platforms, and web-hosting services. Its purpose is to enforce Section 79 of the IT Act, which grants intermediaries "safe harbour" protection – shielding them from liability for user-generated content. For instance, a platform cannot ordinarily be sued for a defamatory post published by a user. The legal liability rests solely with the individual who created the content.

However, this protection is conditional. Under Section 79(3)(b), intermediaries lose their immunity if, after receiving "actual knowledge" from a government agency about unlawful information, they fail to "expeditiously remove or disable access" to it. The portal was introduced to automate and streamline the issuance of such notices. Its existence was first disclosed in *Shabana versus Govt. of NCT of Delhi and Ors* (2024), a Delhi High Court case concerning a missing 19-year-old. During the proceedings, the court stressed the need for a mechanism to facilitate real-time coordination between intermediaries and law enforcement in time-sensitive cases.

Court records reviewed by *The Hindu* show that nearly a third of the 66 takedown notices sent to X by I4C over the past year targeted posts about Union Ministers and Central government agencies. Posts referring to Prime Minister Narendra Modi, Home Minister Amit Shah and his son Jay Shah, Minister of State for Home Affairs Bandi Sanjay Kumar, and Finance Minister Nirmala Sitharaman were among those flagged for removal.

**Why did X go to court?** In March, Elon Musk-owned X filed a writ petition in the Karnataka High Court challenging the legality of the Sahyog portal, which it described as a "censorship portal". The company argued that the government was invoking Section 79(3)(b) of the IT Act to sidestep the stricter and more transparent procedure under Section 69A.

According to X, the two provisions serve distinct purposes. Section 79 merely grants intermediaries safe harbour protection from liability for user-generated content, while Section 69A empowers the Centre to block online material, but only on grounds that mirror



GETTY IMAGES

the reasonable restrictions on free speech under Article 19(2) of the Constitution such as for upholding sovereignty and integrity of India, security of the State, friendly relations with foreign States, preserving public order etc. Notably, Section 69A also mandates that the government constitute a committee, give intermediaries a chance to be heard, and issue a reasoned written order, thereby ensuring the possibility of judicial review.

To bolster its case, X relied on the Supreme Court's landmark ruling in *Shreya Singhal versus Union of India* (2015), which struck down Section 66A of the IT Act for vagueness and upheld Section 69A as the sole constitutionally valid framework for restricting online content, subject to procedural safeguards. The court had clarified that takedown directions under Section 79(3)(b) could only follow a court order or a formal government notification, and must remain tethered to the constitutional grounds in Article 19(2), as reflected in Section 69A. By permitting thousands of officials across both Union and State governments to issue notices through Sahyog, X argued, the Centre had created a "parallel" and "unlawful" censorship regime that lacked these safeguards.

In support of X's challenge, DigiPub, an association of 92 digital news outlets, also intervened in the proceedings, contending that takedown orders routed through Sahyog had a disproportionate impact on its members, whose reporting was frequently targeted.

**What was the government's defence?** The Union government defended Sahyog as a necessary regulatory mechanism. It argued that the distinctive nature of the Internet, with its algorithm-driven virality, required stricter oversight than traditional media. Safe harbour, it said, was a

statutory privilege, not an inherent right, and platforms that failed to act on unlawful content notices would forfeit this protection. Sahyog merely operationalised this obligation by creating a streamlined channel for such notices. Rejecting the allegation that it had created a parallel blocking regime, the government emphasised that Sections 79 and 69A operated independently. Non-compliance with a Sahyog notice, it argued, did not amount to direct censorship but only to the loss of legal immunity. The portal, it insisted, was simply an administrative tool to facilitate swift action against illegal online content.

The government also questioned X Corp's *locus standi*, pointing out that as a foreign corporation, it could not invoke fundamental rights under Article 19, which guarantees the freedom of speech and expression exclusively to Indian citizens. Represented by Solicitor General Tushar Mehta, the Union government contended that X was seeking "special treatment" in India while complying with comparable regulatory regimes elsewhere. It further pointed out that X was the only major intermediary yet to integrate with Sahyog.

**What has the High Court ruled?** Dismissing X's challenge as "devoid of merit," Justice Nagaprasanna described Sahyog as both an "instrument of public good" and a "beacon of cooperation between citizen and intermediary." He emphasised that oversight was especially vital in cases affecting the dignity of women.

The court also upheld the Centre's objection to X's legal standing, ruling that Article 19 of the Constitution is a "charter of rights conferred upon citizens only." Since X is not a citizen of India, it ruled that "the protective embrace of Article 19

cannot be invoked" by the company. Issuing a stern caution to foreign social media corporations, the judgment warned that India could not be treated as a "playground" where information is disseminated "in defiance of the law" and later disowned through "a posture of detachment." Entry into the Indian marketplace, the court underscored, is a "privilege tied to responsibility and accountability," and no platform can claim exemption from the country's legal framework.

In a pointed critique of X's conduct, Justice Nagaprasanna observed that the platform complied with takedown regimes in the United States, "yet the same platform refuses to comply with takedown directions in this nation". Referring to the U.S. Take It Down Act, 2025, which criminalises the publication of AI-generated deepfakes and non-consensual intimate imagery, he noted that X readily adhered to U.S. laws that impose criminal liability for non-compliance, but resisted equivalent obligations in India.

The court also rejected X's principal contention that the Sahyog portal lacked statutory backing and that Section 79(3)(b) of the IT Act did not authorise content takedown. Justice Nagaprasanna reasoned that the Supreme Court's ruling in *Shreya Singhal* was anchored in the now-defunct Information Technology Rules of 2011 and could not be "transposed" to the present context.

The 2021 IT Rules, he held, are "fresh in their conception and distinct in their design" and therefore "demand their own interpretative frame, unsaddled by precedents that addressed a bygone regime."

**What are the implications?** Prateek Waghre, Head of Programs at Tech Global Institute, told *The Hindu* that the High Court's ruling risks enabling an unchecked expansion of state control over online content. "The problem lies in the absence of clear, narrow, and objective criteria for what constitutes unlawful content. In practice, this is likely to result in broader censorship of information that fosters political accountability, as well as the suppression of views across the spectrum," he said. Mr. Waghre cautioned that content takedowns, whether initiated by platforms or directed by law enforcement, are not a sustainable solution, since both actors often operate selectively and in self-serving ways. "Law enforcement already has mechanisms to prosecute harmful speech under criminal codes, but these are enforced inconsistently and subjectively. Without deeper social and political reforms that disincentivise harmful expression and curb selective enforcement, the trade-off between curbing abuse of power and safeguarding free expression will endure. There are no easy fixes here."

In a statement issued on September 29, X said it was "deeply concerned" by the single-judge verdict and would file an appeal. However, it did not clarify whether the challenge would be placed before a larger Bench of the Karnataka High Court or taken directly to the Supreme Court.

X further argued that the ruling was inconsistent with a Bombay High Court judgment delivered last year in September, which struck down the Union government's Press Information Bureau fact-checking unit on the ground that it violated principles of natural justice by permitting unilateral determinations by the executive.

## THE GIST

▼ The Sahyog portal is operated by the Indian Cybercrime Coordination Centre (I4C) as a centralised platform for issuing takedown orders to internet intermediaries, including telecom operators, internet service providers, social media platforms, and web-hosting services.

▼ In March, Elon Musk-owned X filed a writ petition in the Karnataka High Court challenging the legality of the Sahyog portal, which it described as a "censorship portal."

▼ Dismissing X's challenge as "devoid of merit," Justice Nagaprasanna described Sahyog as both an "instrument of public good" and a "beacon of cooperation between citizen and intermediary."



CACHE



An overhaul: Demonstrators march in support of Palestinians near the Microsoft Build conference, calling for the termination of Microsoft's Azure contracts with Israel in Washington, U.S. on May 21, 2024. REUTERS

# The Wassenaar Arrangement: the need to reform export control regimes

While the Arrangement has expanded to include controls on 'intrusion software', the structure of the Arrangement is such that control means physical exports of devices, chips, and hardware modules. As a result, many information flows related to cloud services fall in grey areas

Vasudevan Mukunth

The modern Internet is built on vast computing backbones that a very small number of companies control. Among them, Microsoft has become indispensable to governments worldwide. But when its infrastructure was used to deepen Israel's repression of Palestinians, the episode raised difficult questions about how export regimes can govern services they may never have imagined when those rules were drafted. Export regimes are international agreements between supplier countries to control the export of sensitive goods and technologies to prevent the proliferation of weapons of mass destruction.

## The Wassenaar Arrangement

A particularly important instrument is the Wassenaar Arrangement, a multilateral "export control regime" for conventional arms and dual-use goods and technologies. In a voluntary coordination framework, its participating states commit to control lists and exchange information while allowing each government to retain its discretion on licensing, implementation, and enforcement.

In 2013, the Arrangement expanded to include controls on "intrusion software", that is, software designed to bypass or defeat security protections of networks and certain surveillance or cyber-surveillance systems. The structure of the Arrangement was however conceived in an era when control meant physical exports of devices, chips, hardware modules, etc., and software transfers were written off as incidental.

As a result, many technology and information flows related to cloud services fall in grey areas. For example, the Arrangement doesn't always treat the access, use or administration of software to be an export in every context, and allows countries to differ on how they interpret a technology transfer. The software-as-a-service (SaaS) model in particular complicates matters because

here the user remotely invokes a functionality instead of installing it locally, and the Arrangement can't say whether that's an export of a controlled technology.

Moreover, as the Arrangement is based on consensus, any member can block modifications. And even when a technology is controlled, the Arrangement requires individual countries to implement controls as per their domestic export control legislation, which often differs in ambition and political will. As a result, the Arrangement's coverage is patchy and many states have loopholes to allow "defensive security research" and internal technology transfers.

## A need to re-evaluate

India joined the Wassenaar Arrangement in 2017 and incorporated its lists into its Special Chemicals, Organisms, Materials, Equipment, and Technologies framework. Yet like many participating states, its engagement has largely been about securing legitimacy in global export-control regimes rather than pressing for the Arrangement to adapt to the era of the cloud. As a result, even as membership of the forum has been widening, the regime remains unable to address the technologies most likely to be misused for surveillance and repression.

To bring the Arrangement into operational relevance, its scope needs to expand significantly. For example, its list of controlled technologies should explicitly include infrastructure and services that enable large scale surveillance, profiling, discrimination, and real-time control and systems that break national boundaries (for example, regional biometric systems or cross-border data transfers linked to policing). Including such technologies in the control lists would require devising criteria for capacity thresholds and carving out defensive, benign uses under strict safeguards and licensing.

Second, a major obstacle is that many control regimes still conceptualise 'export' as physical transfer or download.

In the cloud, an export can also be remotely executed or invoked in API calls. The Arrangement thus needs binding guidance that treats remote enablement, authorisation, and granting administration rights as equivalent to export if they provide access to a controlled technology. The Arrangement should also embed end-use controls more systematically. While classical export control is about military use or the proliferation of weapons of mass destruction, for cloud services and digital surveillance the risk is mass human rights abuses. For instance, the license to use some technology should depend on the item's technical specs as well as on the identity of the user, the jurisdiction, the oversight regime, the legal mandate, and the risk of misuse.

Third, the Arrangement's voluntary nature is a weakness in high-risk settings. States should instead adopt a binding treaty or framework with obligations that include mandatory minimum standards for licensing, mandatory export denial in atrocity-prone jurisdictions, and supervision by peer review.

Fourth, cloud services are global: a user in one country can trigger concerns in another. National licensing authorities must share information and align their policy decisions. To this end, the Arrangement should include technical interoperability standards, a shared watchlist of flagged customers or entities, and exchange red alerts in real-time, for example, when a cloud provider offers certain services to a blacklisted state.

Fifth, cloud and AI technology move at high velocity, and the Arrangement needs to be equally agile. This can be facilitated by a specialised technical committee or secretariat that's empowered to propose interim updates, fast-track high priority controls, and receive inputs from independent experts. The Arrangement should consider adopting a sunset mechanism that causes items to fall out of the control list unless their inclusion is renewed. In fact, given the additional challenge of global consensus, the Arrangement may also consider hosting a

domain-specific control regime for AI, digital surveillance, cyber weapons, etc. which aligns with the overall regime while possessing the ability to evolve faster.

## Is such reform realistic?

Some powerful states may resist stricter controls of cloud services by arguing it would stifle innovation, sovereignty and/or impose undue regulations on private industry. A small number of holdouts can still block changes to the Arrangement as it exists, especially those that benefit from providing surveillance technologies abroad. Further, mapping cloud systems to control categories; define thresholds; distinguishing benign versus malign use, and implementing cross-border licensing is an extremely intricate enterprise.

Still, a pragmatic path is possible – and perhaps necessarily under the Arrangement. Some states, especially in the EU, are already pushing national export controls on 'high technologies' currently beyond the Arrangement's reach. The EU's dual-use regulation now treats the transmission of cloud services as potentially subject to rules that apply to dual-use technologies.

There's also leverage, as specified under the UN Guiding Principles, because cloud providers are large and interconnected.

Stricter export controls could join corporate human rights duty frameworks and limits on public procurement to reinforce incentives on providers to refuse certain customers.

At present, the Arrangement still retains normative weight, with many national export control systems, but especially the U.S. Export Administration Regulations and the EU dual-use rules, drawing from it.

Microsoft's own whitepaper on export controls refers to such regimes as part of its compliance framework. In practice, however, the realities of cloud services and SaaS expose significant gaps, rendering the Arrangement incapable of being a credible shield against the misuse of cloud services.



## FROM THE ARCHIVES

# Know your English

## Upendran

"What's your excuse for being late this time?"

"I'm sorry, I ran into Mrs Mythreye and we started talking."

"I see. Did you run into Mr Mythreye as well?"

"Don't be silly! Mrs Mythreye's husband's name is Jayaraman. I always call him Mr Jayaraman."

"Exactly! So, if he is called Jayaraman, his wife, Mythreye, should be called..."

"...Mrs Jayaraman!"

"Right again! Or she can be called Mrs Mythreye Jayaraman. But it's wrong to call her Mrs Mythreye."

"I see. Does that mean I cannot call your cousin Mrs Uma?"

"Many people call her Mrs Uma. But it's wrong to call her that. When you use the title 'Mrs', you must include the husband's name. You cannot use it with a woman's first name alone. For example, in Uma's case, you can call her 'Mrs Uma Gopal' or 'Mrs Gopal'. But you cannot refer to her as 'Mrs Uma'."

"But what if the woman happens to be a doctor?"

"The same rule applies. If the woman is a doctor and she is married, then you use the husband's surname. In Uma's case..."

"...she should be Dr. Uma Gopal."

"That's right. You can also call Dr. Gopal. It would be wrong to call her Dr. Uma."

"I see. But tell me, some people put a full stop after 'Mrs' and some people don't. Which is correct? Is it 'Mrs.' or 'Mrs'?"

"Both are correct. When you write the word 'Mrs', you can have a full stop after it. If you don't want to have it, you needn't. Be consistent in whatever you do."

"That makes sense. Some women put 'Ms' before their names. It means the same thing as 'Miss', doesn't it?"

"No, it doesn't. First of all, the 's' in 'Ms' is pronounced like the 'z' in 'zoo'."

"So the word is pronounced 'miz'. But what's the difference between 'Ms' and 'Miss'?"

"'Miss' is a title used with unmarried women. It is also used with little girls as well."

"I know that!"

"'Ms', on the other hand, is a word that was coined during the Women's Liberation Movement."

"Why did women invent this word?"

"Simple. They didn't want people to know whether they were married or not."

"What?"

"When I refer to someone as Mr Jayaraman, you have no clue as to whether he is married or not."

"That's true."

"But when I call a woman Mrs Jayaraman, you immediately know that she is married."

"And similarly when you address someone 'Miss Jayaraman', you know that she is not married."

"Exactly! And that's why women wanted a title which would not inform others of their marital status."

"So they came up with the title 'Ms.'"

"Correct."

Published in The Hindu on April 14, 1998.

## THE DAILY QUIZ

On International Translation Day, test your knowledge of the art and profession that bridges languages, cultures, and nations

Prathmesh Kher

### QUESTION 1

In what year did the United Nations General Assembly adopt the resolution declaring International Translation Day?

### QUESTION 2

Which UN resolution officially declared September 30 as International Translation Day?

### QUESTION 3

What are the six official languages of the United Nations?

### QUESTION 4

What is the official theme for International Translation Day 2025?

### QUESTION 5

Which document holds the distinction of being among the most translated in the world?



Visual question: International Translation Day is celebrated on the birth anniversary of this man. Identify him. GALLERIA BORGHESI/CARAVAGGIO

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

1. The definition of a foreshock. Ans: A smaller quake that precedes a larger mainshock

2. The definition of an aftershock. Ans: A smaller quake following a mainshock in the same region

3. The term for the point on the Earth's surface directly above the hypocentre. Ans: Epicentre

4. This law relates the frequency of earthquakes to their magnitude. Ans: Gutenberg-Richter law

5. This global belt accounts for the majority of earthquakes. Ans: The Pacific Ring of Fire

Visual: This was the most powerful earthquake of the 21st century. Ans: The 2004 Indian Ocean earthquake and Tsunami

Early Birds: Sadhan Kumar Panda| C. Saravanan| Tito Shiladitya| Sukdev Shet| Sadhan Kumar Panda

## Word of the day

### Insouciance:

the cheerful feeling you have when nothing is troubling you

Synonyms: carefreeness, lightheartedness

Usage: After I started a new job, I lost my sense of insouciance.

Pronunciation: /ɪnsʊˈsiː.əns/

International Phonetic Alphabet: /ɪnsʊsi.əns/

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





# The EDITORIAL PAGE

WORDLY WISE  
ART WASHES AWAY FROM THE SOUL THE  
DUST OF EVERYDAY LIFE.  
—PARLO PICASSO

## The Indian EXPRESS

FOUNDED BY  
RAMNATH GOENKA

BECAUSE THE TRUTH INVOLVES US ALL

### THE NEW TARIFF

Tariffs on pharmaceutical products by Trump administration will reverberate. It sharpens challenge for India's policymakers

**L**AST WEEK US President Donald Trump provided another policy shock that reverberated across the world when he announced that his administration would impose a 100 per cent tariff on branded or patented pharmaceutical products, a 50 per cent tariff on kitchen cabinets, bathroom vanities and associated products, and a 25 per cent tariff on heavy trucks from October 1. Of course, the pharma tariffs created the biggest ripples. The US accounts for almost 40 per cent of Indian pharmaceutical exports, and until now, pharma exports were exempt from the 50 per cent tariffs imposed by the Trump administration on Indian goods. Not surprisingly, India's pharma stocks took a severe hit on Friday. The Nifty Pharma index, which is designed to reflect the behaviour and performance of the pharmaceutical sector in India, fell by more than 2 per cent as the news spread. The fate of many individual pharmaceutical stocks was worse. For instance, Sun Pharma declined by 4.9 per cent, Biocon by 3.8 per cent, Abbott India Ltd by 3.5 per cent and Zydus Lifesciences was down 3.4 per cent.

The new tariffs were announced after the US Department of Commerce launched a range of investigations under Section 232 of the Trade Expansion Act of 1962. Tariffs announced under this section are different from the so-called "reciprocal tariffs" under the International Emergency Economic Powers Act (IEEPA). As tariffs under IEEPA have come under increasing judicial scrutiny — and have even been struck down by some US courts — the Trump Administration has increasingly moved towards using Section 232 of the Trade Expansion Act in a bid to ring-fence new tariffs. It is also notable that the new tariffs are more sectoral in nature, not against any one specific country. The new list adds to the existing sectoral tariffs on imports of steel, aluminium, auto and auto parts as well as copper. Another significant aspect is that these tariffs are likely directly towards branded and patented medicines, not generics (off-patents). This means Indian exports may not be as severely affected although more clarity is needed on this matter, especially in relation to "branded" generics.

The fact that the Trump administration has imposed yet another layer of tariffs should not come as a surprise either to policymakers or companies or indeed investors. Trump states determined to bring manufacturing back to the US as well as to bridge the trade deficit with all countries. Reports suggest that more sectoral tariffs, such as on semiconductors, are in the offing. For Indian policymakers, the task is threefold. One, to conclude a trade deal as quickly as possible to limit the damage. Two, to open up new markets and deepen existing ones. And most importantly, to undertake and accelerate domestic reforms to make Indian businesses more efficient.

### CHIEF DEFLECTOR

Paper leak in Uttarakhand is part of a dismal pattern. CM Dhama's attempt to communalise the issue is troubling

**T**HE QUESTION PAPER leak in the Uttarakhand Subordinate Service Selection Commission (UKSSSC) exam for graduate-level posts, and the response of Chief Minister Pushkar Singh Dhama to the protests that began on the streets of Dehradun and spread across the state, are disquieting. They point to a state apparatus incapable of safeguarding the integrity of public examinations and unwilling to reckon with the consequences of its own failures. This is not the first time the UKSSSC has found itself mired in controversy, nor is it the only recruitment body in the state to come under a cloud. In January 2023, the Uttarakhand Public Service Commission (UKPSC) had to cancel its patwari and accountant exam over allegations of malpractice. In December 2021, the UKSSSC was similarly hit by a paper leak. For a state with a high level of unemployment, one that is also being hollowed out by migration — entire villages in Uttarakhand have been emptied of the young, who have left in search of better livelihoods — the message is dispiriting: Merit and hard work count for little in a system that can be so easily rigged. In this context, Chief Minister Dhama's response to the protests seems particularly tone-deaf — and troubling. He has resorted to communal dog whistle politics, labelling it "nakal jihad". Announcing an SIT to investigate the incident, he has attempted to discredit the protesters for "anti-national and anti-samarat" slogans. His attempts to deflect and divert — "...the youth are wise and nationalistic as our state shares borders with two countries, and they belong to Devbhoomi, so they will move forward with these ideals", the CM said — reek not merely of gaslighting but of a disregard for the shared frustration and distress of those out on the streets, across regions.

In recent years, competitive examinations have been compromised across states such as Rajasthan, Madhya Pradesh and West Bengal, each case leaving behind a trail of disillusioned aspirants, their trust in the public recruitment system chipped away by corruption. The September 21 examination in Uttarakhand, meant to fill 416 vacancies across positions such as patwari, lekhpal and village development officer, saw over 40,000 candidates appear in 121 centres across Dehradun alone. In a country where nearly 65 per cent of the population is under the age of 35, the turnout reflects the desperation of a generation navigating a fragile job market, where government employment remains one of the few perceived lifelines to social mobility and economic stability.

The burden is on the state to expand opportunities. It will take more than ritual investigations, lip service or attempts to deflect from the issue at hand. It needs compassion and sincerity of intent. Uttarakhand's youth deserve a future that isn't sabotaged by the incompetence — and cynicism — of the powerful.

### THE QUIET ART

Gaitonde's understanding of nature informed the tranquility of his work, each canvas a silent prayer and reflective offering

**F**OR V S GAITONDE, both life and art were an act of spiritual discipline, rooted in silence. Much like his reclusive temperament, the stillness of the vast fields of mediative colours and floating forms on his canvases urged introspection, delving into the silence within rather than the cacophony without. The same quiet intensity of a still mind defined his 1970 canvases painted in shades of luminous yellow and translucent ochre that has commanded a staggering Rs 67.08 crore at a Saffronart auction in Delhi, making it the second most expensive Indian artwork to be sold at an auction; second only to MF Husain's 1954 *Untitled (Gauri Yatra)*, which fetched more than Rs 118 crore in March 2025.

Hailed as a "genius" by Husain, unlike his contemporaries, Gaitonde steered away from the political and the social, opting instead for the non-representational and the ethereal. Though he did experiment with the figurative in the '40s — a period that also saw him immersed in Indian miniature traditions — the contours of his figures were meant to fade away. As the lines softened and the imagery became obscure, colour gradations gained prominence and by the mid-'50s he had discovered the "non-objective", which he held distinct from the abstract, even asserting: "There is no such thing as abstract art".

The artist often sat in quiet contemplation gazing at the vast sea from a bench outside the Bhulabhai Desai Memorial Institute in Mumbai — where he occupied a studio in the '60s. He took on the world with the same immense timid fear. While his influences ranged from his engagements with Zen philosophy prompted by Eugen Herrigel's book *Zen in the Art of Archery* to his interest in the philosophical and spiritual teachings of Jiddu Krishnamurti and Ramana Maharshi, his deep understanding of nature also informed the tranquility of his art, with each canvas meant to be a silent prayer and quiet offering.



SANDEEP DWIVEDI

AN INVALUABLE ALL-ROUNDER of Don Bradman's "Invincible" team of the late 1940s, Keith Miller once had to crash-land his fighter jet during World War II. Going to work in his Royal Australian Air Force fatigues before he donned the Baggy Green, Miller had seen death from close quarters while taking on the Germans in the skies.

During his second innings, in the middle of a tense Ashes tour, the straight-talking Aussie was once asked about the pressure of playing against arch-rivals England. Foldore has it that Miller gave an almighty scoff followed by these famous lines: "Pressure is a Messerschmitt (German fighter jet) up your a's. Playing cricket is not".

Probably the only man in history to have undertaken dangerous sorties and played top-level cricket, Miller underlined the ridiculousness of comparing brutal confrontations on a battlefield with the far more genteel and entertaining sporting face-offs.

But in this Asia Cup, which took place months after the mostly aerial conflict between India and Pakistan, cricketers, administrators and top politicians of the two nations have tried to merge these two worlds. They have overlaid cricket's significance and symbolism.

All through the tournament, players in both blue and green have behaved like fighter jets, with frequent war references and juvenile one-upmanship. If one day a Pakistan player, fielding on the fence where the Indian fans were seated, mimicked an aircraft in free-fall, in the next match, an Indian bowler did the same after uprooting his stumps. Press conferences have indulged in "whataboutery" and "who started it" debates.

Media boxes — ideally, islands of neutrality in an emotionally charged atmosphere — haven't remained untouched, either. There have been abusive exchanges between reporters from both sides of the border during the India-Pakistan games. Here, too, reminders of military operations and unverified claims of death and destruction have been used by both sides to win debates. Prime Minister Narendra Modi described

By treating it as such, both India and Pakistan do the game — and its future — a disservice

India's win in the final as "Operation Sindoor on the games field". Before the final, Mohsin Naqvi, the Pakistan Cricket Board (PCB) chief — who is also his country's Interior Minister — had also posted on social media an image of his top players in olive air force dungarees. The BCCI secretary, Devajit Saikia, would add his bit. "Our armed forces have delivered it in the border area, now the same thing has been repeated in Dubai... It was Operation Sindoor earlier and now it's Operation Tilaak," he said, referring to the incredibly mature knock by Man of the Match Tilaak Varma that took India home in the final.

No one seems to be worried about hanging way too much on a game of glorious uncertainties. This Asia Cup wasn't the last time India and Pakistan played cricket; it wasn't some end-of-the-world apocalyptic duel. There will be more rounds and different results, and the shoe could well be on the other foot. In a week's time, the India and Pakistan women's teams will be meeting in a World Cup game. They lock horns at a neutral venue: Colombo, Sri Lanka. Next year, the men will meet again, this time for the World T20. As the edge-of-the-seat Asia Cup final showed, cricket, especially the T20 format, is a sport of fine margins.

Had the Pakistan wicket-keeper not fluffed an easy run-out, the day's hero, Varma, wouldn't have been around to pull off a miracle. Had Pakistan not committed hara-kiri and had their middle- and lower-order batsmen not collapsed in a heap, India might have failed to win this tense race. A slip-up here, a rub-of-green there and the tide could have turned. Had Pakistan won the final, would that have symbolised their military superiority over India?

But when victory on a cricket field is less about celebrating your own success and more about being hurtful towards others, lines get crossed. When the stakes are so illogically high, watching cricket ceases to be a pleasurable pursuit and becomes a nerve-jangling ordeal.

It isn't wise to allow the pride of a nation and its capability in safe-guarding its borders

to be judged by the result of a cricket match. Sport is a great leveller and it has a habit of pulling down the over-confident and those who don't respect its vagaries. Players need to guard their turf; they don't need non-cricket actors setting the agenda for them.

Over the last fortnight, Suryakumar Yadav has broken a longstanding captain's code. After his team's second win in the tournament over Pakistan, he declared the end of cricket's most storied rivalry. Without any provocation, he said that Pakistan was no longer a match for India. Even if statistics show that Indians win more often these days, captains as a rule don't write off their rivals.

Far more competent batsmen and much more successful captains than Suryakumar — Sachin Tendulkar, Sourav Ganguly, Rahul Dravid, MS Dhoni, Virat Kohli, Rohit Sharma — have taken the dais after even grander wins over Pakistan, but none has shown this arrogance. Indian captains, historically, are known for their grace and quiet confidence in their teams; they never made such sweeping statements of superiority. They knew how to respect rivals and rivalry. Amidst the worst political tensions, they shook hands and kept the chatter to cricket.

Operation Tilaak was an exemplary cricketing triumph, a rare instance of a batsman keeping his poise during a difficult chase in a high-pressure final. It doesn't need any metaverse, cosplaying references. Operation Sindoor was a compulsion with very different consequences.

In sport, at worst, a defeat means a heart-break, tears shed into a towel soaked with sweat and a few days of social media trolling. Wars are grim affairs. Unlike in cricket, there is no DRS or second chance. Wars end in coffins reaching homes, orphans, widows and families taking a lifetime to deal with the loss. War offers real do-or-die situations, not the ones cricket writers allude to in their reports. Let's not belittle the dogfights of military jets in the sky by comparing them to a bat-ball contest in the slog overs.

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## MYTH AS MIRROR

'Jugnuma' weaves a parable about land, belonging and survival



VANI TRIPATHI TIKOO

INDIAN CINEMA HAS always carried a paradox. On the one hand, it thrives on spectacle — song, dance, colour, and drama that overwhelm the senses. On the other, it harbours a quieter tradition: Films that refuse noise, that slip into the folds of allegory and fable to say something sharper about who we are. *Jugnuma: The Fable*, Raam Reddy's new feature starring Manoj Bajpayee, belongs firmly to the latter category.

At first glance, its story seems deceptively simple. Dev, a landowner in the Himalayan foothills, tends to his apple orchards even as wildfires creep closer. The villagers whisper about nomadic horsemen. His wife, Nandini, struggles with his growing detachment. Dev busies himself with an odd, quixotic invention: Wings that he hopes will lift him away from despair. Around them, lullabies, folktales, and whispers of myth form a quiet chorus.

Yet, beneath this simplicity lies a dense parable about land, belonging, and survival. In the burning orchards of *Jugnuma* lies the burning world we all inhabit. Wildfires are never just natural disasters. Every blaze exposes a deeper crisis: Fragile ecosystems ravaged by climate change, unsustainable development, and weak governance. But Reddy's film refuses the language of reportage. Instead, fire becomes a metaphor: It is the creeping unease of a community on edge, the suspicion that turns neighbour against neighbour, and the despair that makes Dev dream of flight. There is a political bite here. When villagers point fingers at nomads, the film echoes a recurring pattern in Indian society: The ten-

dency to scapegoat the vulnerable. Much of the film's texture comes from myth and fable. Fireflies glow against smoke. Radha (Tillotama Shome) tells stories that sound like warnings. Even Dev's wings feel drawn from some forgotten folktale. For international audiences, myth often appears in Indian cinema as exotic embellishment. But *Jugnuma* insists on myth as a mode of survival. Across India, marginalised communities keep alive their struggles through oral traditions, songs, and rituals. In *Jugnuma*, fable is political.

At the heart of the film is the orchard. It is livelihood, legacy, and contested terrain. Land in India has never been neutral. It is bound up with caste hierarchies, inheritance disputes, and the fraught politics of displacement. In recent years, debates on land acquisition, mining leases, and industrial corridors have exposed the cracks in India's development model. Farmers' protests reminded the nation that land is not just an economic asset but a lifeline, an identity. *Jugnuma* distils these debates into allegory. The orchard burns, not only because of climate, but because the ownership of land itself is always under fire. Dev, as landowner, is complicit in this structure even as he mourns its loss. His wings symbolise the elite's desire to escape responsibility. In essence, Reddy's fable is a critique of privilege.

Any parable risks floating away into abstraction. What anchors *Jugnuma* is Bajpayee's performance. He chooses restraint. Dev is often silent, absorbed in thought, his glances unfinished, his gestures hesitant. It is in these silences that the film's political power lies. They

remind us that despair is an active force, shaping how communities fracture, dreams turn brittle, how escape becomes more tempting than confrontation. Bajpayee embodies this with rare precision, making *Jugnuma* of our times: Conflicted, complicit, and longing. Indian cinema's international image remains polarised: Bollywood extravagance on one side, Satyajit Ray's realist humanism on the other. *Jugnuma* belongs to neither camp. It leans closer to auteurs like Andrei Tarkovsky or Apichatpong Weerasethakul, who use dreamscapes and myth to ask unsettling questions. This makes *Jugnuma* significant not just as a film but as a cultural intervention.

What, then, does *Jugnuma* offer us in 2025? It offers a mirror to our burning landscapes — from Uttarakhand's forests to the fields scorched by heatwaves. It warns us about the ease with which communities fracture under fear. It insists that stories, myths, and fables are not relics but living strategies of resistance. And it asks us to question privilege: Who owns the orchard, who labours on it, and who burns when fire comes?

In an era where politics often promises certainty but delivers only crisis, *Jugnuma* is radical in its refusal to provide closure. It does not tell us how to stop the fire. It only makes us sit with the smoke, the silence, and the fire. For Indian cinema, that is no small achievement. For Indian society, it is a reminder we cannot afford to ignore.

The writer is a theatre actor, filmmaker and film producer

## SEPTEMBER 30, 1985, FORTY YEARS AGO

### BARNALA MINISTRY

AMID REJOICING By a big gathering, a six-member Akali ministry, led by Surjit Singh Barnala, was sworn in by Governor Arjun Singh at Raj Bhavan in Chandigarh. The five ministers, all of Cabinet rank, are Balwant Singh, Amrinder Singh, Sukhjinder Singh, Basant Singh Khalsa and Major Singh Ubode. Slogans of "Joke so nihal, sat Sri akal" were raised as they took the oath of office.

### PM IN BHUTAN

PRIME MINISTER RAJIV Gandhi and King Jigme Singye Wangchuk of Bhutan resolved to consolidate the close and warm friendship

that exists between India and Bhutan. Expressing their desire to build further on the excellent foundations that have been laid, the two leaders in their respective speeches noted with satisfaction that it was possible for a large country like India and a small neighbour like Bhutan to "co-exist in perfect harmony, trust and cooperation."

### ERSHAD EASES CURBS

BANGLADESH MILITARY RULER Lt Gen Hussain Muhammad Ershad is finally going to allow restricted political activities. He banned political activities on March 1 when the two major opposition alliances and the fundamentalist Jamaat-e-Islami refused to

participate in the elections till the fulfilment of their five-point demands, which included the withdrawal of martial law, restoration of democracy, holding of parliamentary elections before the presidential polls, freedom of the press and independence of the judiciary.

### LONDON RIOTS

THIRTY-SIX PEOPLE were injured when a mob of about 300 Black youths surged through the streets of Brixton district, burning cars and buildings and looting shops after the police accidentally shot a Black woman. Ten of the injured were police officers and 26 civilians, including seven journalists and firemen.





# THE IDEAS PAGE

## Between state and people

In these uncertain times, Partha Chatterjee's new book is an opportunity to reckon with our past with an eye to the future



**DESHKAAL**  
BY YOGENDRA YADAV

WHEN WAS THE last time we had a book of such breadth and depth on Indian politics? I asked myself this question as I finished reading Partha Chatterjee's recent book *For a Just Republic: The People of India and the State*. My mind raced back to Rajni Kothari's *Politics in India*, an iconic book published in 1971 that transformed the way we think about the subject. In a similar way, Chatterjee's latest offering promises to change the way we study Indian politics since Independence.

This much-awaited book weaves together the many threads that Chatterjee has spun over the last four decades in his multiple avatars. Chatterjee, the historian of ideas, had alerted us to the derivative aspects of our nationalist thought. Chatterjee, the ghost writer for Charvak, had busted the myths the Indian nation likes to tell about itself. Chatterjee, the subaltern studies scholar, had drawn our attention to the mechanisms of governmental-tyranny through which the people are controlled by the state. Chatterjee, the anthropologist of power, noted how the people resist these moves by snatching piecemeal concessions from the rulers and how populist rules in turn respond to regain control. These writings have made Chatterjee into an academic superstar. His arguments have been a staple diet for students of South Asian history and politics.

Yet something was missing from his oeuvre. He owed us an overall account of politics in contemporary India that went beyond the hints and glimpses scattered through his writings, that was not just limited to a critique, that offered us a way forward. This is what Chatterjee does in *For a Just Republic*. And he does it in a way that only he can. He surveys hundreds of academic monographs spread over fields as diverse as the history of political ideas, political ethnography, regional history, political economy, cultural studies, gender studies and normative political theory, while synthesising all that material into a meta-argument. This is among the many reasons this book is going to stay on the bookshelves for a long time to come.

Besides the breadth and depth, this book shares something substantial with Kothari's iconic book. *Politics in India* broke from the lazy assumption that India was following the same track as the West in becoming a developed nation and a liberal democracy. Kothari argued that politics was not to India's unique modernisation precisely because politics in post-Independence India refused to follow the standard script of western liberal democracies. His was a story of the astonishing deepening of democracy in a traditional society by drawing upon unusual resources like caste and by evolving odd paths like the one-party dominant system. Kothari's story was to hit the state of the world. Emergency within five years of its publication. He never released another edition of his own masterpiece.

Chatterjee's story is not so rosy, but his starting point is also a rejection of the idea that India is following the European trajectory of developing into a modern individualist society, a capitalist economy and a liberal democratic state. Instead, what we have in post-colonial India is a bifurcation of political reality,



C R Sasikumar

between the state and the people, the two keywords in the subtitle of the book. On the one hand, we have a formal state apparatus that builds on the legal-administrative frame of the colonial state while claiming the cultural legacy of an ancient civilisation and offering liberal governance to its citizens. This liberal constitutional form of representative government seeks to secure the rule of the dominant capitalist class through coercion and dispensing welfare benefits to its subjects. "Nation-state" is Chatterjee's name for this layer that is at once culturally thin but increasingly powerful in terms of its regulatory and coercive capacity.

Beneath this formal layer, on the other hand, we have the ground reality that refuses to play by the given script. This reality is anchored differently in different regions of India and varies by its unique caste, class and gender configuration. It shapes very different imaginations of Indian nationhood in different parts of the country — with deep regional memories and only a shallow shared history of the nation. When the fiction of liberal governance hits this ground, it has to reckon with and make exceptions for social groups and communities of poor and disadvantaged people. The logic of rule-based governance has to give way to populist politics with a focus on short-term welfare and inventing an enemy. The dream of capitalist democracy has to confront the reality of a vast population in the informal sector that is redundant for capitalism but essential for political legitimacy. Chatterjee calls this ground reality "people-nation".

Chatterjee locates the enduring crisis of the Indian state in the tension between these two layers of "nation-state" and "people-nation", in the "structural failure to adequately tailor the inherited state to fit the cultural form of people-nation". The crisis is not new. The pluralist advocates of unity-in-diversity shared this failure with the current advocates of Hindu nationalism. What we have today is an unabated unfurling of the logic of nation-state, with overt majoritarianism, centralisation of power, a populist ruler presiding over an elected dictatorship and an economy that is split into core zones of capitalist growth versus regions that supply natural resources or cheap labour. But the roots of the crisis go back to the Constituent Assembly, when the imperial state apparatus was accepted as the

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core of the new nation-state.

The way forward, then, is to institutionalise and deepen the logic of people-nation. This would mean moving towards a just federation that acknowledges all its parts as equal, makes arrangements to counterbalance the dominance of one region and the Hindi language and evolves unique measures for each region to allow for its special requirements. This would also entail an acceptance of coalition as the most appropriate form of political power at the Centre with due acknowledgment of the role of regional parties. At a deeper imaginative plane, it requires acknowledging the newness of India as a body of citizens who share deep history and memory of their region but a shallow shared understanding of the nation.

What, then, is to be done? Chatterjee suggests a threefold shift in deploying our political energies. First, we should shift our attention from the national to the linguistic regions. Accordingly, our focus must shift from all-India campaigns conducted in English and national media to the regional languages. And the focus of economic policies should shift to the mobilisation of small and middle enterprises in the regions. Second, our obsession with laws as an instrument for social transformation should give way to social reform that seeks to change the culturally entrenched popular beliefs. And finally, he has a suggestion for "civil society": Don't displace or replicate politics, just focus on improving the integrity of public institutions.

You could quarrel with these operational suggestions. You could fault his normative vision. You could confront his core argument about the "nation-state" versus the formulation of "people-nation". I can already anticipate a series of questions about the relationship between these two: Are these two layers that co-exist, or two models that compete, or two stages that come one after another?

You could ask many more questions. But you cannot now write about Indian politics without reference to *For a Just Republic*. You cannot ask questions about Indian politics without keeping Chatterjee at the back of your mind. That is the hallmark of a great book. In these uncertain times, it is an opportunity to reckon with our past with an eye to the future.

The writer is member, Svaraj India, and national convener of Bharat Jodo Abhiyan

## WHAT THE OTHERS SAY

"Trump and Netanyahu will face each other on Monday. The responsibility now lies with the US President: he must insist, as he knows how to, and finally bring a deal that will release the hostages and end the bloodbath." — HAARETZ, ISRAEL

## The company Pakistan keeps

With growing transactional ties with the US, defence pact with Saudi Arabia, Rawalpindi may feel more emboldened



**SHARAT SABHARWAL**

THE WIDELY CIRCULATING images of US President Donald Trump's recent meeting with Pakistan Prime Minister Shehbaz Sharif and army chief Asim Munir evoke the Punjabi expression 'Rubi khair kare' (May God keep everything well). The US and Pakistan have never had strategic congruence, but have periodically come together in a transactional relationship with disastrous consequences. Their Cold War partnership and the resulting large US financial and arms flows to the Pakistan army contributed to its turning into a praetorian force, encouraging it to pursue deleterious policies within and outside Pakistan. Their association during the "Afghan jihad" unleashed the most retrograde religious zealots, who have continued to haunt the region and the global community for over three decades and have finally come home to roost. Pakistan joined the US War on Terror under duress, but played a Janus-faced role in bringing the Taliban, which had been ousted at the beginning of the campaign, back to power in Kabul. In a classic case of fatal attraction, the US has come back to partner with the Pakistan army.

The aforementioned meeting comes in the backdrop of the Pakistan-US bonhomie in recent months, which signals a new transactional phase. In June, Trump hosted Munir at a luncheon meeting in the White House. The consequences of this transactional phase may not be known for quite some time. But let us look at what lies behind it.

It appears to have originated with the Trump family's reported interest in the crypto business in Pakistan, thereby providing the Pakistanis a valuable connection to the White House. They then dangled the critical minerals carrot, resulting in a US company spending a \$500 million investment deal with Pakistan earlier this month.

Islamabad and Rawalpindi were quick to endorse Trump's repeated claims of having "stopped a war" between India and Pakistan in May, and nominated him for the Nobel Peace Prize.

Not much is known about the content of the meeting. Sketchy information released by the Prime Minister's Office speaks of Sharif inviting US investment in the agriculture, information technology, mining and energy sectors, and discussing counterterrorism cooperation. But the economic content of the meeting seems overblown. Aside from crypto business and critical minerals, Pakistan cut a deal with the US at a relatively low tariff rate of 19 per cent. However, the overall bilateral trade is low, at a little over \$7 billion per annum. Trump has spoken of the US role in developing Pakistan's "massive oil reserves". But Pakistan does not have any proven "massive" energy reserves, and extensive exploration would be an uphill task in view of Pakistan's current security environment.

Further, Pakistan is slowly emerging from the geopolitical tight spot in which it had found itself for over two decades because of its serious entanglement with terrorists with links to surfacing all over the world. It enjoys solid support from China, as evident during Operation Sindoor. The recent defence agreement with Saudi Arabia and the improving relationship with the US add to this trend. Experience tells us that when Pakistan has a stable equation with its key international partners, it feels emboldened to be more adventurous towards India. We will have to keep a close eye on further developments to safeguard our interests.

The manner in which Munir has been fetted by Trump seems to suggest a substantive security content in the discussions. It could not be just about counterterrorism. Are the Americans trying to enlist Pakistan's support in the context of Iran or Afghanistan? The Taliban is resisting the US demand for the Bagram airbase. Pakistan also seems to be nearing a breaking point with the Taliban, inter alia, on the issue of alleged terror attacks from Afghan soil. Could the two sides join hands to exert pressure on the Taliban?

Further, Pakistan signed a Strategic Mutual Defence Agreement with Saudi Arabia recently, with barely concealed references by the two sides to a possible Pakistan nuclear umbrella for Saudi Arabia. However, this sensitive aspect does not seem to have stirred any non-proliferation souls in Washington, DC enough to warrant a public statement. Could it be that the Americans were kept in the loop and see a role for Pakistan in the security architecture of West Asia under their tutelage? The Americans may also want Pakistan to be part of the International Stabilisation Force envisaged in the 21-point plan on Gaza presented by Trump to Arab and Muslim countries in New York on September 24. Incidentally, Sharif has lauded Trump's efforts to bring an immediate end to the war in Gaza. These are all possible scenarios. Things should become clearer in the coming months.

The road to the latest transactional phase will not be smooth. We will have to see how Pakistan balances its coysing up to the Trump administration with its relationship with China, which has widened and deepened significantly. Moreover, in taking up any security role in West Asia, the Pakistanis risk getting caught in the quagmire of the region and may be biting off more than they can chew because of their own fraught security environment.

The upswing in the US-Pakistan relationship comes at a time when there are serious irritants in the US-India relationship. The Pakistan-US partnership has impacted us adversely in the past. Resumption of financial aid and military supplies by the US to Pakistan would be a matter of concern to India, as would enhanced financial flows from the Saudis or investment by them in Pakistan's military-industrial complex. West Asia is India's extended neighbourhood and of vital interest to it. Any role for Pakistan in its security architecture would equally be of concern.

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Sabharwal is a former high commissioner to Pakistan and author of *India's Pakistan Conundrum: Managing a Complex Relationship*



**NISHANT SHAH**

INDIA'S HISTORY WITH global technology platforms has rarely been smooth. Facebook was summoned before Parliament for amplifying hate. Twitter resisted government orders during the farmers' protests, partly complied, and was threatened under new IT rules. Despite the conflict, India never banned them. The logic was clear: These platforms were too deeply embedded in everyday life. The government sought compliance, however incomplete, rather than exclusion.

The case of TikTok unfolded differently. In June 2020, amid buyer tensions with China, TikTok and dozens of other Chinese apps were banned overnight. TikTok had more than 200 million Indian users at the time. For many, it was the first platform where they could be visible. This ecosystem disappeared in an instant. No attempt was made to negotiate localisation, no conditional approvals were considered. TikTok was treated as dispensable.

The reason cannot be only "because China". The ban points to a deeper reality: India has not developed the infrastructure or regulatory capacity to negotiate with global platforms that do not originate in the United States. With American companies, India has tried to wrestle, even often unsuccessfully. With TikTok, it lacked the imagination or tools to attempt a negotiated outcome.

## Your platform, our terms

What India can learn from US's TikTok deal

By contrast, the US has now crafted just that. After months of debate about banning TikTok, Washington has settled on a "third track". TikTok will operate, but under strict conditions. All US user data must be stored on Oracle's servers. Its operations will be overseen by a board of trustees appointed domestically. Even its recommendation algorithm will be subject to controlled inspection and licensing. It is worth remembering that this is not TikTok's first fork. ByteDance had already created two versions: Douyin for China, and TikTok for everywhere else. For global tech firms, this is routine: To survive, they must split, localise, and negotiate across jurisdictions. The US deal shows that such adaptation is possible. But it also shows that TikTok itself has built the flexibility to live in parallel forms. India has never attempted this. Nor have homegrown apps shown the capacity to be remade across contexts.

The settlement was made possible because the US has the capacity to build its own cloud, technically skilled regulators, and legal mechanisms that enforce compliance. India lacks such instruments. Its digital economy has been built as global servicing infrastructure: Data centres hosting foreign clients, engineers coding for export, policies that attract outsourcing and investment. This has generated

jobs and growth, but not the localisation infrastructure needed to reshape global platforms on domestic terms.

It is true that India has produced homegrown platforms with national relevance. ShareChat and Moj have built large audiences in regional languages, and Koo briefly offered an Indian alternative to Twitter. But these remain exceptions that highlight the imbalance. They have struggled with retention, monetisation, and scaling beyond niche communities. India's digital priorities have favoured becoming the backend of the global economy over building systems of domestic oversight.

There have been narrow sectoral successes. WhatsApp Pay is a case in point. In 2018, the RBI mandated that all payments data be stored domestically. WhatsApp resisted, delaying rollout for nearly three years, but eventually complied. The service launched in phased fashion, capped at 20 million users. This showed that India can, under certain conditions, enforce localisation. But it was possible only because financial transactions fall under a tightly regulated sector with a strong central authority. Outside such domains, India lacks the mechanisms to compel adaptation at scale.

Social media does not have a dedicated regulator with the authority and technical expertise of the RBI. The Information Technology Act

and the IT Rules provide broad punitive powers, but they are designed more for enforcement after the fact than for negotiated localisation. India has no institutional pathway to require algorithmic audits, data residency, or operational trusteeship from platforms like TikTok. The only choice was to shut it off.

Changing this trajectory means rethinking what our infrastructures are built for. We must begin to imagine cloud and data systems as sovereign systems that enforce residency and accountability. Regulators should be equipped with technologies who can read code and interrogate algorithms in real time. Our laws still rely on coercion as the only tool, when they should also allow conditional permissions and negotiated adaptation. The talent pipelines that prepare engineers for export should prepare them equally for the work of domestic oversight. Without these shifts, India will keep building for others, not itself. TikTok's ban in India leaves behind an important reminder: Until India redefines its priorities, every new platform will arrive as someone else's system, running on someone else's terms.

The writer is professor of Global Media at the Chinese University of Hong Kong and faculty associate at the Berlan Klein Centre for Internet & Society, Harvard University

## LETTERS TO THE EDITOR

### KARUR TRAGEDY

THIS REFERS TO the editorial, 'A superstar's failure' (IE, September 29). The tragic stampede in Karur that claimed dozens of lives was not just a failure of crowd management, it was a stark reminder of how blind devotion to celebrities, fragile public infrastructure, and repeated administrative lapses continue to cost lives in India. The Tamilaga Vetti Kazhagam rally led by actor-turned-politician Vijay drew a crowd far beyond what was expected, and yet the organisers and local authorities failed to ensure even the most basic safety measures. What makes this tragedy more painful is its familiarity. India has already witnessed multiple stampedes this year; the reasons cited remain unchanged. How long will authorities continue to fall back on the same excuses?

Ritika Shah, Chandigarh

THIS REFERS TO the editorial, 'A superstar's failure' (IE, September 29). As a senior citizen of Tamil Nadu, I dip my head in shame at how this state puts film stars on a pedestal. The recent stampede in Karur testifies to the uncontrollable frenzy of the fans who suited in a disorderly manner just to have a glimpse of actor Vijay, resulting in the loss of 40 precious lives and tens of severely injured ones being treated in the ICUs of different hospitals.

Tharicus Fernando, Chennai

### PLANNING TOMORROW

THIS REFERS TO the article, 'Food security amid uncertainty' (IE, September 29). The writer rightly underlines the challenges India faces in ensuring uninterrupted supplies of gas and fertilisers, which are vital for our agricultural system. India must diversify its sources and forge dependable partnerships. What is important is not just securing imports but also investing in long-term strategies that reduce overdependence on any one country. Encouraging innovation in fertiliser production, supporting research in substitutes, and building buffer stocks can help India withstand global disruptions.

Dattatray S Giri, Pune

### DIGNITY OF THE GAME

THIS REFERS TO the report, 'India holds nerve to beat Pak...' (IE, September 29). Cricket is a gentleman's game, and there is no space for the kind of aggression we all witnessed during the India-Pakistan matches at the Asia Cup. It is crucial to understand that our enemy is state-sponsored terrorism, not the people of a country. The ICC and cricket boards must insist on rules that reduce overdependence on any one country. Encouraging innovation in fertiliser production, supporting research in substitutes, and building buffer stocks can help India withstand global disruptions.

Nitin Navin, Delhi



# The Indian Ocean mineral exploration push

India has become the first country to have two contracts with the ISA for PMS exploration. These metals are essential for renewable energy systems, green tech

ANJALI MARAR  
BENGALURU, SEPTEMBER 29

INDIA LAST week signed a contract with the International Seabed Authority (ISA) for exclusive rights to explore Polymetallic Sulphides (PMS) in the Carlsberg Ridge in the Indian Ocean.

India has thus become the first country in the world to have two contracts with the ISA for PMS exploration. It now commands the largest area allocated in the international seabed for PMS exploration—a scientific achievement with strategic importance.

Gaa-based National Centre for Polar and Ocean Research (NCPOR) will carry out the PMS exploration in 2026, starting with geophysical and hydrographic surveys in the licensed area.

India had submitted an application to the ISA in 2024. After the evaluation process, the body allotted India a 10,000 square km area in the Carlsberg Ridge. Signed in 2016, the earlier contract is in the Central Indian Ridge and Southwest Indian Ridge of the Indian Ocean.

**What are Polymetallic Sulphides and why do they matter?**  
Polymetallic Sulphides are deposits on the

ocean floor, rich in strategic and critical metals such as copper, zinc, lead, gold, and silver, along with trace amounts of rare and precious elements.

Since land resources containing these minerals are very limited for India, exploring PMS in the deep ocean could enhance resource security. These metals are essential for high-technology applications, renewable energy systems, and green technologies.

PMS deposits are generally found near hydrothermal vents, which are like hot springs on the ocean floor. The ocean seabed has cracks.

Through these cracks, the cold seawater interacts with the magma under the earth's crust, and is expelled back in a hot

gush. This expelled water is rich in minerals, which are then deposited on the ocean floor as solids.

**What is known from India's previous PMS exploration?**

Since the signing of the contract with ISA in 2016, NCPOR has been conducting exploratory surveys along the central and southwest Indian Ocean ridges. The institute has thus developed expertise and built advanced infrastructure for PMS exploration.

The ongoing Deep Ocean Mission pro-

gram of the government has enhanced these capabilities, including the acquisition of new deep-sea vessels and advanced tools, such as Autonomous Underwater Vehicles (AUVs). Matsya, a deep-sea vehicle under development for the ambitious Samudraayan mission, will provide an additional boost to India's deep-ocean mineral exploration capacity.

The NCPOR's plan is three-phased. **PHASE I:** Conduct reconnaissance surveys using ship-mounted tools and identify potential locations of PMS.

**PHASE II:** Conduct near-seabed surveys using advanced tools such as AUVs and Remotely Operated Vehicles (ROV) to confirm the occurrence of PMS.

**PHASE III:** Resource evaluation of the identified PMS deposits.

**What is the significance of the Carlsberg Ridge?**

The Carlsberg Ridge is a major segment of the mid-ocean ridge system in the Indian Ocean, formed by seafloor spreading between the Indian Plate and the Somali Plate. It is estimated that the current phase of opening of the Carlsberg Ridge began at about 40 million years ago following a major plate reorganisation and its average spreading rate is of 2.4 to 3.3 cm/year. The



ridge has a rough flanking topography and a median valley, which are the characteristics of slow-spreading ridges.

The ridge is known to host hydrothermal vent systems. India has conducted scientific research on these systems during the past

three decades. Strategically, the ridge is particularly important because it is located much closer to India (around 2 degree north) compared with the Central and Southwest Indian Ridges (around 26 degree south).

**How is PMS exploration different from other underwater mineral explorations?**

Exploration for PMS is technically more challenging than other deep-sea mineral investigations. PMS deposits are concentrated near hydrothermal vent systems along mid-ocean ridges, where the seabed is composed of hard, highly complex and uneven rocky terrain at depths of 2,000–5,000 meters. They are generally located in some of the remotest areas of the planet.

PMS survey operations are thus challenging, requiring deep-sea vessels with dynamic positioning and precise navigation and communication systems.

PMS exploration demands a highly multidisciplinary team with expertise in fields like marine geology, geophysics and deep-sea technology. Exploration tools include ship-mounted geophysical and hydrographic survey systems for reconnaissance, and AUVs and ROVs for near-seabed surveys and sample collection. Advanced sampling tools and analytical instruments are needed to characterise mineral composi-

tion accurately.

**How does the ISA allocate a site for mineral exploration?**

The ISA is an autonomous international organisation. It allocates sites for mineral exploration in international waters under the United Nations Convention on the Law of the Sea (UNCLOS) framework. A country, either through its government, public sector, or sponsored entity, can submit applications to the ISA. This application must identify a proposed exploration area along with a detailed work plan, environmental baseline studies, and financial/technical capability documents. The ISA's Legal and Technical Commission (LTC) is responsible for reviewing the application for compliance, and if it meets all requirements, recommends it to the ISA Council for the final approval.

**Is India planning to acquire more Indian Ocean sites for mineral exploration?**

India is looking to acquire additional sites in the Indian Ocean for mineral exploration as part of the Blue Economy initiatives of the Government of India. Specifically, India is interested in the exploration of cobalt-rich ferromanganese crusts on the Afanasy-Nikitin Seamount in the Central Indian Ocean. This application is under review.

## EXPLAINED GLOBAL

### HOW IS THE NOBEL PEACE PRIZE DECIDED, AND COULD TRUMP WIN?

THE WINNER of the 2025 Nobel Peace Prize will be announced on October 10 at the Norwegian Nobel Institute in Oslo by committee chair Joergen Watne Frydenes.

The ceremony, awarding the winner a medal, a diploma and 11 million Swedish kronor (\$1.19 million), will be held at the Oslo City Hall on December 10, the anniversary of Swedish industrialist Alfred Nobel's death.

**Who decides?**

The Norwegian Nobel Committee, which consists of five people appointed by the Norwegian parliament (typically retired politicians). The candidates are all put forward by Norwegian political parties, with their appointments reflecting the parliament's balance of power.

The current committee is led by the head of the Norwegian branch of PEN International, a group defending freedom of expression.

**Who can win?**

Alfred Nobel's 1895 will said the prize should go to someone "who has done the most or best to advance fellowship among nations, the abolition or reduction of standing armies, and the establishment and promotion of peace congresses".

In reality, the prize is generally "placed in the current context", according to Kristian Berg Harpviken, the award committee's secretary.

**Who can nominate?**

Anyone ranging from members of governments and parliaments, current heads of state, university professors, and former Nobel Peace Prize laureates, among others.



The face of Nobel Peace Prize medal shows Alfred Nobel. nobelprize.org

While nominations formally close on January 31, committee members may make their own nominations latest by the first committee meeting in February. All the nominations are discussed and a shortlist is created, with each nominee assessed by permanent advisers and experts. The winner is selected by a consensus in August or September.

The full list of nominations is kept secret. This year's disclosed names include the International Criminal Court, NATO, and Hong Kong activist Chow Hang-tung. The leaders of Cambodia, Israel and Pakistan said they nominated US President Donald Trump. However, their nominations were made after January 31, so they are not valid for the 2025 prize.

**Could Trump win?**

Only if he changes his policies, according to Nobel experts who say he is dismantling the international world order.

Last year's winner was the Japanese atomic bomb survivors group, Nihon Hidankyo. The threat of n-weapons has been a long-standing Nobel focus.

REUTERS

## EXPLAINED POLITICS

### Atipichhda Nyay Sankalp: Why Opposition's EBC resolution in Bihar matters

HIMANSHU HARSH  
PATNA, SEPTEMBER 29

THE MAHA-GATHABANDHAN's announcement of a 10-point 'Atipichhda Nyay Sankalp' ('Extremely Backward Classes Justice Resolution') last week is significant ahead of the upcoming Assembly polls in Bihar. The Extremely Backward Classes (EBCs) are the largest social group in Bihar, one which has been a traditional voter base for Nitish Kumar and his Janata Dal (United). The Opposition's push to attract EBC voters seeks to fundamentally reshape Bihar's electoral dynamics, and help rebirth the Congress' voterbase.

**Who are EBCs?**

The EBCs are a sub-category of Other Backward Classes (OBCs) specially defined by the Bihar government. They comprise socially and educationally disadvantaged castes that were deemed "more deprived" than the larger OBC grouping.

The recent caste survey in Bihar counted about 130 distinct castes or sub-castes as EBCs, including traditional artisans, labour or service communities like the Hajams (barbers), Sahans, Nishads, and Kewats (fishermen communities), Lohars (blacksmiths), Telis (oil traders), and Nonias (salt-makers). Many EBC communities face occupational extinction due to mechanisation and changing economic patterns. For instance, the Kahars (palanquin-bearers) and Nalbands (horse-shoe-makers) have lost relevance in the automobile age.

Collectively, the EBCs make up 36.01% of the state's 13.07 crore population, while OBCs (not comprising EBCs) make up another 27.12%.

**Reservation in Bihar**

Bihar pioneered caste-based reservations more than a decade before the Mandal Commission recommendations were implemented nationally. In 1978, then Chief Minister Karpooi Thakur, an EBC leader himself, announced a 26% reservation in government jobs for backward classes.

The system allocated 12% to Most Backward Classes (later termed EBCs), 8% to OBCs, 3% for women, and 3% for economi-



Rahul Gandhi, Congress President Mallikarjun Kharge and RJD leader Tejashwi Yadav presented the 'Atipichhda Nyay Sankalp' in Patna last week. X/Byaditejashwi

cally weaker sections among upper castes. These quotas were based on recommendations made by the Mungeri Lal Commission, which had identified 128 backward communities in the state, of which 94 were categorised as "most backward".

In the 1990s, Rashtriya Janata Dal (RJD) governments further expanded EBC quotas. Lalu Prasad raised it to around 14% during his tenure; Rabri Devi to around 18%.

In 2006, Nitish Kumar's government reserved 20% of seats for EBCs in Panchayati Raj institutions. During his tenure, the scope of EBC reservations was extended to municipal bodies and various welfare schemes.

In 2023, during the rule of the short-lived JDU-RJD alliance, the Bihar Assembly passed Bills raising the collective reservation for SC, ST, OBC, and EBC from 50% to 65%, in line with the findings of the caste survey. The EBC quota was raised to 25%. This 65% quota, combined with the existing 10% reservation for EWS, would have increased the total reservation to 75% in government jobs and educational institutions.

In June 2024, the Patna High Court struck down the quotas as unconstitutional, arguing that the state government's population-based rationale was insufficient to breach the 50% limit established by the Supreme Court in the landmark Indra Sawney (1992) case.

**Congress, RJD & the EBCs**

Thakur's OBC and EBC reservations had faced fierce opposition from upper caste leaders within his Janata Party, as well as indirect resistance from the Congress. When Thakur was ousted in 1979, the Congress-backed Chief Minister Bihari Prasad Shastri did not scrap the policy but set up new commissions to reassess reservations.

The 'Karpooi formula' influenced the establishment of the Mandal Commission by the Janata Party government in New Delhi in 1979. While the Commission's 1980 report recommended a 27% OBC quota in central jobs and education, the Congress, wary of alienating its upper caste base, did not act upon it through the 1980s.

It was only in 1990 that V P Singh's Janata Dal government implemented the Mandal recommendations, triggering mass upper-caste protests and nationwide churning on social justice. Through this period, Congress adopted a non-committal stance—neither championing OBC quotas nor opposing them outright.

In contrast, in the post-Mandal 1990s, Lalu's RJD actively expanded OBC and EBC entitlements. While consolidating the Muslims-Yadav base, Lalu also advanced the cause of numerically smaller but marginalised EBCs through hostels, educational

scholarships, targeted recruitment, and expanded quotas in local bodies.

The Congress's position on OBCs and EBCs shifted gradually as its upper-caste base eroded. Through the 1990s and 2000s, electoral compulsions nudged it toward accepting caste quotas more explicitly.

By the 2010s, Congress began supporting the expansion of EBC reservations, state caste surveys, and a revision of the 50% cap. In the 2020s, under Rahul Gandhi, it has moved to fully commit to championing the EBCs to counter the Bharatiya Janata Party's (BJP's) stronghold in national politics, demanding proportional quotas and embedding these commitments in coalition pacts.

**The resolution**

The resolution promises of a dedicated EBC Atrocities Prevention Act similar to SC/ST law; increasing EBC reservation in panchayats from 20% to 30%; breaking the constitutional 50% reservation ceiling by placing laws in the Ninth Schedule; eliminating 'Not Found Suitable' (NFS) practices; land distribution to landless families; enhanced education quotas; contract reservations; and establishing a regulatory authority for oversight.

The banning of NFS practices is particularly significant. These practices involve selection committees allegedly rejecting qualified reserved-category candidates. Data show that 62-65% of SC/ST university recruitment interviews end with NFS decisions. The resolution to end NFS would effectively force committees to fill all reserved positions with eligible candidates, unless they are genuinely unqualified.

Another promise is to give landless EBC families 3 decimals in urban areas and 5 decimals in rural areas. The recent Abhiyan Bastera survey shows that across Bihar's 83 districts, there were 137,029 landless families registered, of whom 48.5% have received plots under existing government programs, leaving 70,638 families (51.5%) awaiting land allotment. Most of these families are from the EBC group.

But several promises are likely to face challenges. While Bihar hopes to use the Ninth Schedule route to bypass the SC's 50% cap on reservations, the 2007 court's *J.R. Coelho* judgment means such laws can be challenged if they violate the basic structure of the Constitution.

# All about wheel-well stowaways on airplanes & the perils of flying 'hidden'

SUKALP SHARMA  
NEW DELHI, SEPTEMBER 29

SNEAKING INTO an aircraft wheel well and travelling as a stowaway is an extremely dangerous thing to do, with the odds heavily stacked against survival.

Yet, such incidents keep surfacing. On Sunday, when maintenance was being undertaken on an American Airlines plane that arrived in the US state of North Carolina from Europe, the body of a stowaway was found.

Occasionally, wheel-well stowaways—those who try to travel in the unpressurised and unheated wheel well or landing gear compartment—survive miraculously. One such incident happened earlier this month on a flight from Afghanistan to India, when a 13-year-old boy from Kunduz wanted to travel to Iran.

He managed to sneak into an aircraft's

rear wheel well at the Kabul airport, except that the flight was bound for New Delhi. For over 90 minutes, the boy was in the wheel well as the aircraft cruised at over 30,000 feet.

Miraculously, he landed seemingly unharmed at the Delhi airport and was sent back to Kabul later. Unsurprisingly, given the risks involved, wheel-well stowaways largely come from regions grappling with poverty, conflict, or instability, and are desperate to escape for better opportunities, often unaware of what awaits them.

**What the data show**

According to US Federal Aviation Administration (FAA) data, 132 people tried to travel in the landing gear compartments of commercial aircraft between 1947 and 2021. The mortality rate for wheel-well stowaways is around 77 per cent.

Strict airport security means that such incidents are rare, and in some undocu-

mented cases, the bodies may have even fallen into an ocean or a remote land area during the flight. The only known incident involving Indian wheel-well stowaways was in 1996. Brothers Pradeep and Vijay Saini managed to get into the wheel well of a British Airways Boeing 747 aircraft operating a flight from Delhi to London. While Pradeep survived the long-haul flight, his brother didn't.

Researchers have concluded that to gain access to the aircraft, the typical stowaway would hide near the point where the departing plane waited at the runway for takeoff clearance. While it was stationary, the stowaway would mount a landing gear and climb into a wing recess area adjacent to where the wheel is supposed to retract.

**Havoc on human body**

Metal covers over the landing gear com-

partment provide a degree of safety (mainly from falling off). However, the biggest imminent threats emerge once the aircraft has taken off, in the form of hypoxia (due to low oxygen) and hyperthermia (due to low temperature). Severe levels of either can lead to unconsciousness and even death.

At over 30,000 feet, where commercial aircraft cruise, air pressure is extremely low, and temperatures can drop to minus 65°C. The moderate stage of hypothermia is accompanied by violent shivers as the body's own core temperature drops by 3°C, and conditions such as shivering speed set in. In severe hypothermia, there is shivering in violent waves, as body temperature falls to 27°C or even lower.

According to a 1997 issue of a publication by the US-based Flight Safety Foundation (FSF), the physiological effects experienced by stowaways are minimal at

altitudes of up to 8,000 feet. But breathing rate begins to pick up as the oxygen level in the blood drops to about 92 per cent, from the sea level average of about 97 per cent.

By 18,000 feet, the breathing rate would rise by about 65 per cent to compensate for the lack of oxygen, and several visual and cognitive symptoms would appear, including weakness, light-headedness and tremors, the FSF publication said. At over 30,000 feet, the blood oxygen levels are lower than what is required to support brain consciousness.

**Only the fortunate survive**

According to a 1996 report by the US FAA's Civil Aeromedical Institute (CAMI), to survive severe hypoxia, physiological control mechanisms place the body into what is known as the "poikilothermic" state, which is similar to hibernation. The body's oxygen requirement diminishes significantly, and it curls into a fetal position to conserve heat.

The heart rate may fall to just two beats per minute, and the breathing rate may be as low as once in 30 seconds, but even reaching this stage would be considered lucky, given the circumstances.

"As a wheel-well stowaway is carried to lower altitudes, a gradual rewarming occurs, along with reoxygenation. If the individual is so fortunate as to avoid brain damage or death from the hypoxia and hyperthermia, cardiac arrest or failure on re-warming, or severe neurovascular DCS (decompression sickness) complications, some progressive recovery of consciousness occurs, perhaps in the period before landing, or at a time after landing. Survival is jeopardized if the recovering stowaway begins moving round and falls out when the landing gear is lowered," the CAMI report noted.

Those who may survive the journey may not be completely unscathed, though, with severe injuries and psychological trauma likely.





## OUR VIEW



## Auto-part makers must plan for an electric surge

India is likely to move from internal combustion engines to electric vehicles sooner than many think. With the clock of obsolescence ticking, what'll auto component makers do?

The scale and pace of change are rising relentlessly. It is evident in everything from how things are produced and marketed, how nations interact with one another and how people move across borders to how political pressures are reshaping trade and finance. The imperative of climate action is forcing a clean transition even upon those who resist being wrenched apart from what they deem normal. Artificial intelligence and low-latency data networks have combined to elevate factory automation to a level that has no direct role for humans, unless something goes wrong and must be fixed. Disruption will mark almost every aspect of our lives before we know it. The future has begun to push the present aside with both elbows in the automobile sector—and with particular aggression. Last week, the German auto-parts major Bosch said it would have to lay off 13,000 workers. In just two years, Germany's auto industry has lost 55,000 jobs. Tens of thousands of more roles face an axe as US trade barriers pose headwinds and Chinese electric vehicles (EVs) overcome the EU's own tariffs to invade European streets. If this is the state of affairs in what's arguably the world's most evolved auto industry, what will happen to India's large army of small firms that produce automotive components once the future storms in?

We would not need to worry too much about India's big automakers. They have the scale, technological nous and the financial staying power to go electric even if our market suddenly accelerates its transition. That cannot be said about our sprawling network of auto part suppliers. The Automotive Component Manufacturers' Association of India has around 1,000

members. Many of them seem well equipped to identify the roles they must adopt once EVs take over our streets. But these are not the only businesses that will come under pressure to evolve. Component makers themselves have thousands of smaller suppliers. These would be left adrift once the internal combustion engine (ICE) sputters its last before being consigned to history. Many seem to think this shift will take ages, given how hard it is to saturate our vast landmass with the charging points needed to go all-electric. This assumption could prove facile, thanks to an emerging class of EVs that fuel up the same old ICE way, but use these refills solely to generate electricity. They do this with the superior thermal efficiency of a dual-cycle gas power plant, which recycles its own exhaust, and the power thus generated runs their motor. These 'extended range' EVs save more fuel than ICE-cum-battery hybrid vehicles do. Crucially, they do not need to be recharged. They can easily venture into remote areas served only by fuel-filling stations. The existence of this technology could spell faster change than many imagine.

An ICE has well over 1,000 parts. Almost a quarter of the auto components made and sold in India relate to an engine that's on its way to the graveyard of outdated contraptions, such as horse buggies and kerosene lamps. What will makers of engine pistons, piston rings, spark plugs and the like do when that happens? The electric motor has far fewer parts. Some companies will have to switch to new lines of production. Additively manufactured drone components, perhaps. The point is to figure all this out now, so that small enterprises and their smaller suppliers can find new livelihoods before obsolescence glares hard at them.



are, respectively, environmental engineer and Nodal Officer, ETS (PM), Gujarat Pollution Control Board; and lead, air and water labs, J-PAL South Asia.

India is at a pivotal moment in its economic journey. As a fast-growing economy in pursuit of developed status by 2047 under the government's Viksit Bharat vision, its development strategy relies heavily on rapid industrial growth. However, this growth is often framed as inevitably coming at the cost of deteriorating air quality. What if this trade-off were not inevitable?

India has emerged as a leading voice for low- and middle-income countries on climate action, setting itself an ambitious target of achieving net zero emissions by 2070. Bridging the gap between economic growth and emission reduction requires bold innovations. One such innovation is an emissions trading scheme (ETS) for particulate matter (PM) pollution, piloted in Gujarat, at state at the forefront of industrialization.

Under an ETS, a regulator caps total emissions and allows businesses to trade allotted permits, offering them the flexibility to reduce emissions in a cost-effective way. To test whether the programme would work,

the Gujarat Pollution Control Board (GPCB) teamed up with researchers from the University of Chicago, Yale University, University of Warwick and the Abdul Latif Jameel Poverty Action Lab (J-PAL). In the dense industrial city of Surat, a portion of firms participated in the ETS and others continued under conventional regulations. The researchers then compared the two groups.

The results were striking. Between 2019 and 2022, industrial units that joined the ETS reduced their particulate matter emissions by 20-30%, performing much better than those that were not a part of it.

As the first Indian state to launch an ETS for particulate matter, Gujarat's experience holds important lessons for India and similar economies. First, an ETS can offer cost benefits even as it complements India's regulatory regime. The Surat ETS not only reduced pollution, but saw participants benefit from 10% lower pollution-abatement costs, which increased their profits. This demonstrates that emission-permit trading has financial appeal and can attract participation.

Traditional command-and-control regulations impose stiff compliance requirements and penalize entities that fail to meet environmental mandates. A market-based approach gives industries the flexibility to

choose between buying emission permits or investing in clean technologies, based on what works best for them. Companies that are unable to afford technology shifts can purchase permits to maintain compliance. By allowing polluters to choose the most optimal abatement strategies, an ETS effectively aligns environmental goals with the demands of economic growth.

Second, emission markets can be tailored to the needs of low- and middle-income countries. The flexibility offered is particularly relevant for micro, small and medium-sized enterprises to stay productive and adapt over time. It enables business units of all sizes to meet regulatory targets. The Surat market was found to function almost perfectly: industrial plants held enough permits to cover their emissions 99% of the time. By contrast, plants outside this market were in violation of their pollution limits at least a third of the time.

This approach can be replicated in different geographies and used for different pollu-

tants. Building on the success of the pilot, the GPCB expanded the programme to cover additional Surat clusters and launched an ETS in Ahmedabad in September 2023. Gujarat is now considering assessing the feasibility of an ETS for other pollutants like sulphur emissions. Maharashtra is all set to announce a sulphur emissions market in five industrial sectors, with similar efforts underway in Rajasthan and other states.

Third, the Gujarat ETS for particulate matter shows how digital infrastructure and big data can enable innovative environmental regulation. It relies on real-time emission data from Continuous Emissions Monitoring Systems (CEMS) installed in industrial chimneys, allowing informed decision-making by regulators and companies. Low-quality data is penalized by the system, which serves to improve pollution monitoring accuracy and credibility—critical for effective environmental regulation through an ETS.

Toxic air represents more than an envi-

ronmental concern—it's a health and economic crisis. Exposure to fine particulate matter pollution has been linked to severe respiratory illnesses and premature deaths. According to the Air Quality Life Index, India's population could gain 3.5 years in life expectancy on average if the country's air quality meets World Health Organization guidelines. Cleaner air is also a prerequisite for sustained economic growth. A high proportion of deaths in India are attributable to toxic air. The World Bank estimates that the lost output from such premature deaths equals 1.36% of India's annual GDP.

India's National Clean Air Programme and the expansion of real-time air quality monitoring mark a welcome policy shift: clean air has become fundamental to India's economic and human development agenda. Gujarat's ETS experiment offers a powerful example of how scientific evidence and innovative regulation can combine to help us meet our economic growth and environmental sustainability imperatives.

These priorities need not be mutually exclusive. Well-designed emissions trading markets can help India deliver on both objectives and the payoffs could be substantial. Gargi Pal of J-PAL South Asia contributed to this piece.

## THEIR VIEW

## Extraordinary tech power calls for due regulatory responsibility

'Superpower' technologies demand a legal framework. India should seize the day by providing one



CYRIL SHROFF is managing partner, Cyril Amarchand Mangaldas.

Are we becoming part human and part machine, or is the human-machine balance tipping in favour of machines? Whichever way one looks at it, it is clear that humanity today is where science fiction was until yesterday. While artificial general intelligence is expected to become the norm, a host of newer super technologies have queued up at the beta stage. As all these come together, a new sense of power is being unleashed. But unbridled power can be dangerous. As the difference between science fiction and reality blurs, it is worthwhile to recall a life lesson given to Peter Parker on becoming Spiderman: "With great power comes great responsibility." Today, that means framing the right laws to protect and provide for businesses and society.

As a new world takes shape, one must examine the dimensions that define it. Taking into account all the thrills, fears, opportunities and threats in store, these dimensions can broadly be classified as follows:

**The relationship between innovation and transformation:** A simple analogy can define this relationship. What speed is to physics, technology-driven scale and value are to new-age businesses. A shining example of speed, scale and value is Nvidia, which became the world's first company ever to reach \$4 trillion in market capitalization, surpassing other Big Tech firms. This

US-based company's success can be attributed to soaring demand for the AI chips that it designs and sells. There are many more companies reporting similar leaps in scale and value, with technology driving their success.

While AI is undoubtedly the brightest shining star in the tech-verse, it is part of a string of emerging technologies that form a broader constellation of stars. The World Economic Forum in its *Top 10 Emerging Technologies of 2025* report has listed innovations that have the potential to completely redesign industry and society. Against this background, a new breed of 'frontier firms' has emerged that use a mixed labour force of human employees and AI agents. Microsoft describes these digital workers as "intelligence on tap," signifying their ability to cater to precise intelligence needs. Apart from offering analytical capabilities, these 'digital colleagues' can work tirelessly around the clock, thus amplifying a company's capacity without adding to its headcount. This approach, however, entails a social cost, as it could increase human unemployment and its related ailments. The law must catch up with this transformation, not only to develop trust in the system, but also to provide solutions for its fallout on society.

**Law and ethics as guides of digital capital formation:** Innovation is best carried out without barriers, but it risks faltering without a structure. Law is the institutional framework that converts ideas into sustainably investable assets, providing clarity to entrepreneurs and investors. India could be at the world's forefront of creating a progressive framework of law and ethics. Recall that our homegrown digital public infrastructure found pride of place in the Bletchley Declaration of 2023 that addressed many facets of AI. This highlighted India's growing international influence over technology policies.

Yet, a staggering number of tech-driven startups operate in legal grey zones. As of today, many innovative

business ventures are far ahead of the guidance provided by law. This is evident in the e-commerce industry, where entities struggle with ambiguity in inventory-based and marketplace models. India has the third-largest startup ecosystem in the world and startups need protection from the fate that befell the online gaming industry. The abrupt collapse of money-based online gaming not only wiped out billion-dollar ideas in the blink of an eye, it was also a stark reminder that innovation without regulation can be fragile.

Businesses and legal frameworks are part of the same ecosystem. They are not parallel tracks. Without clarity on intellectual property, the data governance framework, liability standards and so on, we cannot sustain investor confidence. This is a non-negotiable condition in the digital economy; certainty of regulation is a *sine qua non* for both entrepreneurs and investors.

**Mindset for navigating ambiguity:** In a world marked by legal ambiguities and volatile geopolitics, entrepreneurship is not for the faint-hearted. For India's new-age entrepreneurs, grit is the compass that will help their businesses stay the course. India's chaotic and high-stakes environment will reward those who are innovative, not reckless; vigilant and resilient, not brittle; optimistic, not foolhardy; humble, not brash; and ambitious and agile, not stoic.

All the above dimensions show that the fundamentals of value creation are being rewritten and a new economic order is unfolding. Why else would the digital economy—supercharged by AI and other technologies—emerge as the fastest growing segment globally?

For Indian innovations to flourish in this unpredictable landscape, we must provide a legal and ethical scaffolding. India has already proven its rule-writing prowess through digital public infrastructure; it must now come forward to help convert pioneering ideas into enduring assets of global value.

*Carpe diem, India!*

## 10 YEARS AGO



## JUST A THOUGHT

Who controls AI regulation decides the future of civilization.

RAY KURZWEIL

## THEIR VIEW

## India's industrial growth is not at odds with clean air

TEJAS C. PATEL & SANJANA GORTI

### Gujarat's test project of an emission trading system shows how pollution can be lowered optimally

informed decision-making by regulators and companies. Low-quality data is penalized by the system, which serves to improve pollution monitoring accuracy and credibility—critical for effective environmental regulation through an ETS.

Toxic air represents more than an envi-





THEIR VIEW

MINT CURATOR

# Deregulation is a must but don't fall into the one-size-fits-all trap

Four leading Indian states are serving as a test zone for reforms but others need space for policies adapted to their own needs



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In 1991, India embarked on major economic policy reforms in the face of a financial crisis. Today, tariff bombs lobbed by the US administration under Donald Trump have led to a chorus demanding reforms so that Indian businesses can cope with trade adversity. Prime Minister Narendra Modi spoke about launching an arsenal of reforms, which is what we need if we are to pull up our socks and prosper. A 100-day roadmap for next-generation reforms was also announced, aimed at strengthening India's regulatory framework and boosting investor confidence: an initiative that is both timely and welcome. Central to this vision is a pilot rollout model inspired by the 'flying geese' model of growth, with Maharashtra, Gujarat, Tamil Nadu, Delhi and Karnataka serving as testing grounds. In addition, a Deregulation Task Force has been constituted to drive state-level initiatives. This is complemented by two high-powered groups of secretaries, technocrats and economists that will focus on advancing Viksit Bharat goals and non-financial sector regulatory reforms.

Evidence shows high-growth states consistently share high-growth attributes, such as a sustainably favourable business environment. The choice of those states for a pilot rollout thus appears logical, not only because they consistently attract high levels of foreign direct investment (FDI), possess strong industrial bases and have reformist track records, but their ecosystem is proactive. Moreover, testing reforms in front-runner states shall reduce the risk of policy-failure spillovers. If successful, however, these reforms would have a demonstration effect on other states and could be adopted across India. This is a sandbox approach, like China's experiment with Shenzhen, which was its first special economic zone (SEZ), designed to test market-oriented policies before expanding them.

While India's central government pushes for deregulation, the efficacy of the exercise will depend on what exactly is envisaged. Unfortunately, the framework it is following remains uncertain and its working groups lack transparency. Given the quasi-federal nature of India, where states do not follow reforms sequentially but compete parallelly, such a one-size-fits-all approach might not work. Karnataka cannot be compared with Chhattisgarh, nor Gujarat with Jharkhand. Replicating models that are successful in one state might not be successful in other states, given their current position. States are often driven by competitive rather than cooperative federalism. Thus, the actual challenge lies in striking a balance between the two by ensuring that reforms are not merely replicated but adapted to the specific needs of a state. An alternative approach could be to pilot reforms in selected districts within each state by following the SEZ or GIFT City model.



The main challenge lies in policy implementation at all levels, particularly in our states. There are often trade-offs between administrative, populist and reform-oriented mindsets among states. Most laggard states face frequent bureaucratic transfers and understaffing, which weakens administrative continuity and accountability. The solution lies in making the government smaller by reducing the layers where corruption thrives. The use of digital public infrastructure and private sector involvement can cut down in-person touch points, disempowering rent-seeking nodes.

Under its project titled 'Benchmarking Business Compliances in Rajasthan with Other States,' CUTS International has been consulting industry and government stakeholders for insights in support of the state's deregulation efforts. Its findings highlight persistent challenges, including bureaucratic complacency, tenure instability, high utility costs, manual procedural touchpoints and difficulties in land acquisition and use conversion, among others. Despite easing labour compliance requirements, such as relaxing restrictions on women working at night, the new labour codes remain unevenly implemented in Rajasthan.

The government could use this opportunity not just to test digital compliance tools, but also to fast-track the long-overdue enforcement of all four labour codes across Indian states; this would substantially reduce the compliance burden. India's pilot rollout model can be a good start for next-generation reforms so long as the Centre is mindful of these caveats and laggard states are willing to learn. The model can have a cascading

impact if successful states or regions inspire the rest not to copy-paste reforms, but treat them as a source of learning for contextual adaptation. Importantly, the process should involve adequate stakeholder consultations and a cost-benefit analysis so that gains are maximized and risks minimized. Regulatory Impact Assessments need to guide the path ahead. These will not only encourage reformers to make space for flexibility in their reform architecture, but also ensure transparency and ownership of reforms. Given the heterogeneity of states, this will offer them breathing room to work on long-term competitiveness. India could also follow South Korea's 'cost-in, cost-out' rule by eliminating or easing regulations that impose excessive costs each time new rules are introduced or altered under a reform drive. Care needs to be taken that deregulation doesn't go overboard but achieves optimal settings.

As India aims to become a developed nation by 2047, the current push for deregulation is both timely and necessary amid a fragmented and volatile global environment. While the government lays emphasis on deregulation, many states have started undertaking small targeted reforms. Delhi has scrapped police approvals for hotels and restaurants, while Odisha has modernized its building bye-laws to improve space utilization. Sustaining this momentum through a well-guided framework and monitoring mechanism will be crucial for achieving targets. We need accelerated FDI inflows to generate employment opportunities, boost income levels and expand domestic savings, ultimately enhancing the ease of living.

## Is the US-China TikTok deal a 'win-win' or a win for Beijing?

America may be ceding something more valuable than it realizes



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When US President Donald Trump first brought up banning TikTok on perceived national security concerns more than five years ago, the app from Beijing-based ByteDance was the envy of the global tech industry. Its powerful algorithm had rejuvenated a tired social media landscape by keeping users engaged not just via posts from friends, but by endlessly recommending other content based on how they interacted with clips they came across. Beijing, however, drew a red line, saying there was no way ByteDance would give up its crown jewel of the consumer tech industry. Chinese officials accused Washington of trying to plunder their private companies and even updated export laws to prohibit a sale of TikTok's secret sauce: its algorithm.

That uncompromising stance now appears to have softened, at least on the surface. While Trump has hailed an accord that ostensibly saves TikTok's US operations, Beijing has revealed almost nothing about what was agreed. But state-backed media has repeatedly described it as a "win-win" in road-terms. The purported deal has raised more questions than answers, but the biggest one Americans should ask is: What did Trump give up to save TikTok?

China could still pull out of a deal. Or its terms may not pass muster in Washington. Beijing has yet to publicly confirm whether it has given its approval, despite Trump signing an executive order to advance plans for American investors to buy its US operations. But the time is ripe for China to concede TikTok. A law was passed with bipartisan support to ban the app for a divestiture during the Biden administration and TikTok has exhausted its legal battle to remain in the US.

Over half a decade since all this began, Washington and Beijing are locked in a battle over tariffs, rare earth magnets and advanced semiconductors. The lines of code powering TikTok have become one of the biggest sticking points in stabilizing a deteriorating relationship between the two superpowers. With deflationary pressures at home and broader macroeconomic uncertainty, Beijing has bigger worries.

Trump had campaigned on saving the app and credited it with making him a "star" and reaching younger voters. TikTok doesn't even operate in China, and it's become very clear over the years that it means much more to Trump than it does to Xi Jinping. This has only given Beijing more leverage. Now is the time to use it. Xinhua reports that a framework for a con-



TikTok's American future matters less to China than it does to the US.

sensus was reached that also aims to resolve other issues like reducing investment barriers and promoting economic and trade cooperation. That suggests something was offered in exchange for allowing TikTok to stay in America. US Treasury Secretary Scott Bessent said the threat of the app going dark in the US ultimately sealed the deal. Yet, Trump has gone beyond the law to punt the deadline for TikTok's US shutdown four times this year alone, and when the app briefly ceased operations in America this January, the president himself took credit for its return in a message to its 170 million US users. Clearly, something else was introduced to prevent the platform from being turned off after he promised to save it.

As part of the deal, Beijing is sticking to its original red line. ByteDance will reportedly still own the coveted algorithm, but will license a copy of it to a US consortium to rebuild its own version 'from the ground up,' as a White House official stated. It's unclear whether this will abide by the US law to ban the app and ensure that Beijing won't have a shred of influence. The tech landscape has also moved on. ByteDance in the US is best known for being TikTok's owner, but in China it has already shifted focus to becoming an AI powerhouse. Its Doubao chatbot is the most popular AI app in the country by monthly active users and its latest model is the top-ranked AI system, just behind OpenAI's ChatGPT and ahead of DeepSeek and Alibaba's Qwen.

While it was once the centerpiece of China's global tech ambitions, TikTok may now be just another tradable asset in a larger strategy to secure dominance in key technologies of the future. Xi has held his ground so far by standing up to Trump and eking out an extended trade war. Now, something has to give. Allowing the White House to find a way to keep TikTok in the US is a strategic peace offering amid more pressing priorities.

In his 2025 book about Apple's relationship with Beijing, tech journalist Patrick McGee writes: "In China, 'win-win' means China wins twice." Trump may be taking a public victory lap for keeping a version of this popular platform in the US, but it could prove far less valuable than what Beijing quietly walks away with. **BLOOMBERG**

THEIR VIEW

# Boards should place cyber resilience above AI adoption

SRINATH SRIDHARAN



is a corporate advisor and independent director on boards.

As reported, a cyber-attack has pushed Jaguar Land Rover (JLR) into crisis that strikes at the heart of corporate resilience. The attack silenced production lines, leaving 33,000 employees idle, and threw its global supply chain into turmoil. The Tata-owned firm had been negotiating an insurance policy but had not secured it when the breach occurred. If the disruption ultimately costs £2 billion, as estimated, it will surpass JLR's profit after tax for 2025. As JLR generates nearly 70% of Tata Motors' consolidated revenue, the news took little time to reach the Indian stock market.

Cyberattacks are common across industries. What is striking about this case is that one of the world's top automakers, with global reach and deep resources, got so severely destabilised. If this is the vulnerability of a global brand, Indian companies with leaner buffers may be at greater risk.

Too many Indian boards still view cyber threats as operational details, delegated to the CIO or relegated to compliance reports.

Yet, it is an enterprise-level threat that could close factories, compromise financial systems, disrupt customer access and trigger regulatory penalties. In its most extreme form, it can drive a solvent company into insolvency. For company directors, cyber oversight is part of their fiduciary duty, and neglecting it is the equivalent of ignoring any other foreseeable risk.

India has seen many similar episodes. Major firms in our pharma, IT services and automobile sectors have endured ransomware attacks that froze operations for weeks and inflicted losses running into hundreds of crores. These incidents did not always dominate the news, but their scale and cost are well understood within industry circles.

Regulatory expectations are also evolving rapidly. The Reserve Bank of India has mandated cyber frameworks and incident reporting for its regulated entities. The Securities and Exchange Board of India has tightened disclosure rules for market infrastructure institutions. The Digital Personal Data Protection Act gives the data regulator the power to impose huge penalties for data exposure. Cyber resilience is being treated as an essential element of systemic stability.

Investors are moving in parallel. Proxy advisory firms are yet to start highlighting

boards that visibly lack cyber-safety oversight. Rating agencies and global funds now assess cyber preparedness as part of governance quality, but not as rigorously as they check other risks. Companies that fail to meet resilience expectations could face valuation discounts, investor activism and potentially even shareholder litigation.

The responsibility of boards is clear. They must establish formal frameworks for cyber governance. Without these, directors expose themselves on three fronts. They fail in their fiduciary duty by ignoring foreseeable risks. They undermine enterprise resilience by leaving operations vulnerable to paralysis and liquidity stress. And they weaken market credibility, since investors and regulators now expect the assurance that cyber risks have been taken care of.

Boards must also treat insurance as a strategic necessity. No responsible director would leave factories, fleets or critical physical assets without cover. Yet, many still leave

their digital backbone under-insured, despite its key role in a modern business. Insurance cannot prevent an attack, but it can stop one from turning into an existential crisis. Insurers examine governance maturity, vendor oversight, incident response and recovery planning.

Directors must demand sharper answers from the business's management. Do we know the exclusions in our policies? Do we know what layers remain uninsured? Have we tested whether a claim would actually be honoured? Do we have estimates of the maximum probable loss if systems shut down for weeks?

A broader policy debate is unavoidable. Should cyber insurance be mandated by a certain scale for listed entities? For banks and other such institutions, the answer is obvious, given their custodianship of public trust and deposits. But the JLR case shows that systemic risk exists across sectors. Large listed corporations employ vast workforces, anchor supply chains and

shape investor sentiment. Uninsured breaches could destabilise markets.

India should therefore consider a phased mandate that requires listed companies to disclose their cyber frameworks, with minimum insurance coverage norms subject to regulatory scrutiny. Such vulnerabilities cannot be ignored in a market where millions of retail investors place their savings in listed companies with the expectation of sound governance. Leaving these investors exposed to unchecked cyber risks is no different from failing to safeguard public monies held by banks.

This will raise costs. But the cost of neglect is far greater. One uninsured breach can erase hard-won brand equity, invite regulatory penalties, fracture consumer trust and spark investor flight. Boards will be judged on whether they had the foresight to build cyber resilience. It is a test of governance, leadership and accountability.

Right now, Indian boardrooms seem captivated by a race to show artificial intelligence (AI) adoption as a marker of ambition and driver of value creation. Yet, while entities chase AI, their more urgent task is to secure their digital backbone. A company that cannot survive a breach cannot credibly claim to be future-ready on technology.

**AI is buzzy but the JLR case makes it clear that cyber-risk mitigation is a bigger business priority**





Children in Gaza are not learning to live—they are learning to survive

Mosab Abu Toha

newindianexpress.com

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

— Ramnath Goenka

## KEEP THEATRICS OFF CRICKET FIELD TO HOST WHOLESOME CONTESTS

VERY sporting contest between India and Pakistan gains prominence—and the hype multiplies on the cricket field. When the Asia Cup started about three weeks ago, Suryakumar Yadav and Co were ranked No 1 in T20 internationals, while Pakistan were not even in the top five. Yet, all eyes were on the fixtures between the arch-rivals. The build-up was laced with political overtures. The first of the three matches between the two started without handshakes and ended with the India captain dedicating the win to the Pahalgam terror victims and the Indian armed forces. Similar sub-plots played out while India won the three matches including the final. However, as the gestures on field got uglier, Asian Cricket Council president and Pakistan's interior minister Mohsin Naqvi added fuel to fire with a social media post. The two cricket boards complained against each other at the global governing body, the International Cricket Council.

So, even as India won their ninth Asia Cup crown, after three weeks of handshake-gate, verbal volleys and official complaints, the post-tournament ceremony felt farcical. There was a sense of inevitability to it. By the time the final arrived, the animosity between the two teams had grown so much that it was on open display, with players mocking their rivals during the clash. Things reached the tipping point when the post-match presentation got delayed by one and a half hours, and India refused to accept the trophy from Naqvi.

It's not as if the Asia Cup is witnessing geopolitical hostility for the first time—India withdrew from the second edition in 1986 due to a strained relationship with hosts Sri Lanka and Pakistan skipped the event in India in 1990-91. However, tensions reached a new high in this edition as the theatrics descended to a new low. Things are expected to escalate further, with the Indian cricket board deciding to launch a serious protest against Naqvi at the ICC conference in November. With more multi-national cricketing contests to come, including the ICC Women's World Cup starting in India on Tuesday, it will be prudent to find a lasting solution to keep the intense animosity between the two countries off the field. For that, the two nations first have to walk the path to reconciliation.

## CASTE COUNT SETS OFF HEAT IN KARNATAKA

THE Karnataka government's Socio-Economic and Educational Survey, which began last week, has sparked controversy. Communities are debating how to use their numbers to claim a larger share of the socio-political landscape. The opposition BJP claims the survey will foment unrest similar to the aftermath of the Mandal Commission report. There are other unanswered questions, too. The number of castes and sub-castes is confusing, even more so after the Madhusudan Naik Commission has tentatively listed around 1,400 of them in the state. The Lingayats and Kodavars are in a spot on listing their religion as Hindu. And now, the Centre has intervened with a petition in the high court questioning the survey's purpose and seeking a stay, as have Brahmins and Vokkaliga community organisations.

The ₹420-crore Karnataka exercise follows the recent Scheduled Castes Communities Survey for internal reservation and precedes the upcoming nationwide census, which will also enumerate caste. A similar census by the Congress government in 2015 was set aside in 2024. This time, the enumerators will be asking 60 questions, including details on religion, caste, and sub-caste. Aadhaar is being used to verify identity and prevent duplication. The government says its aim is to assess "the extent of poverty among caste groups". The data collected will undoubtedly influence welfare policies; on the flip side, it could also become a tool for caste politics and electoral posturing.

Amid the controversies stirred by the previous survey, Karnataka's dominant Lingayat and Veerashaiva Lingayat communities are divided over whether to list themselves as Hindu or Lingayat; they seek a separate religious tag. Both sects follow social reformer Basaveshwara, but Veerashaiva Lingayats worship Shiva and follow Hindu rituals, while Lingayats do not worship idols. United, they could form a significant demographic. Agitation over this issue previously hurt Chief Minister Siddaramaiah and the Congress in the 2018 elections. At the centre is the debate over reservations in education, government jobs, and promotions. While governments can conduct surveys—as Bihar and Telangana have done—the data must be transparent and not manipulated to deny communities their due or create division. Building a society with equal opportunities should be the aim, but that appears an idyll when caste politics reign supreme.

### QUICK TAKE

#### HOUNDING HOLLYWOOD

DONALD Trump's post likening countries diverting business from the US to "stealing candy from a baby" conjured up apt imagery. In all his tariff tantrums, Trump himself has repeatedly behaved like an unreasonable toddler. His announcement imposing 50 percent tariff on 'kitchen cabinets and bathroom vanities' in 'national interest' induced visions of Don Quixote tilting at windmills. It would be funny only if windmills, too, were not an actual bughar the world's most powerful leader ranted against last week at the UN. His latest threat to impose 100 percent tariff on foreign-made films would affect the global business model of Hollywood—arguably the US's most potent soft-power weapon. Will Hollywood's powerful financiers pay the price for Trump's tantrums? As the saying goes, this film is not over yet.

THE war in Gaza has dragged on for months with no sign of closure. Israel's military machine has inflicted massive destruction on the densely-packed strip, killing thousands of Palestinians. But the elusive goal of 'final victory' remains beyond reach. Daily reports of two dozen or more casualties are less a measure of military progress than a commentary on Israel's inability to impose its terms. Simultaneously, the diplomatic ground is shifting in ways that may prove more consequential than battlefield maps—and India, as always, must read both carefully.

Gaza is a narrow coastal enclave of just 365 sq km, home to some 2.1 million people. Israel has committed tens of thousands of troops in a campaign of relentless airstrikes and grinding urban combat. Despite repeated announcements of control over neighbourhoods in Gaza City and other towns, Hamas remains far from annihilated. The urban layout and embedded militias make conventional dominance difficult.

What emerges is a paradox. Israel wields overwhelming firepower, yet cannot translate it into decisive political outcomes. Hostages taken during the October attacks constrain operational freedom. International outrage remains high. Domestic fatigue over prolonged deployments and casualties erode confidence. The result is a war of attrition where Israel can destroy but not fully conquer. Victory in war is rarely black-and-white.

While Gaza's streets lie in ruins, the mood in diplomatic corridors has shifted distinctly. In New York, Benjamin Netanyahu's speech to the UN General Assembly was defiant, rejecting recognitions for a Palestinian state by European and Australian governments. He dismissed them as "rewards" for terror. Yet his speech drew walkouts and protests, symbolic of Israel's growing isolation.

The recognitions are historic. France, the UK, Belgium, Portugal, Luxembourg, Australia and others have joined over 155 UN members who now formally acknowledge Palestine. Recognition does not alter borders or lift Gaza's blockade, but it changes the diplomatic balance. The Palestinian Authority under Mahmoud Abbas gains fresh legitimacy just as it seeks to reposition itself as the alternative to Hamas. Addressing the UNGA virtually, Abbas called for a ceasefire and signalled the PA's readiness to assume responsibility for Gaza if Hamas is excluded. The momentum is scripting

As Israel's war drags on without end in sight, West Asia's geopolitical calculus is changing. India needs to position itself smartly to safeguard its energy and diaspora interests

## BEYOND GAZA'S RUBBLE: A DIPLOMATIC MAP INDIA MUST READ

LT GEN SYED ATA HASNAIN (RETD)

Former Commander, Srinagar-based 15 Corps; Chancellor, Central University of Kashmir



MANISH PANDIT

its own narrative, with a significant diplomatic push for the two-state solution.

The US stands uneasily against this. It has shielded Israel repeatedly in the Security Council, vetoing harsher resolutions. But it faces domestic disquiet—Arab-American communities, progressive Democrats, and a restless younger generation are critical of Israel's conduct. The European and Australian recognitions have widened the Atlantic gap. America's line that "now is not the time" for statehood looks increasingly lonely.

For India, the challenge lies in balancing history with present realities. New Delhi was among the earliest non-Arab states to recognise Palestine, doing so in 1986, and it continues to affirm support for a two-state solution. At the same time, India's ties with Israel have grown into a strategic partnership, underpinned by

critical defence cooperation, intelligence sharing, and technology transfers that directly strengthen its security.

The US remains a central partner in India's Indo-Pacific calculus. Current shifts in India-US relations should be read as tactical adjustments rather than a strategic rupture; but the India-US equation in West Asia must not be viewed through a tactical prism alone. In this triangle of relationships, India must tread carefully—upholding its principled backing for Palestinian statehood, preserving the invaluable security relationship with Israel, and keeping step with a US whose influence still shapes the wider region.

Another undercurrent is visible in West Asia itself. Saudi Arabia, once close to normalising ties with Israel under US sponsorship, has recoiled in the face of Gaza's devastation. Riyadh has instead inched towards a defence arrangement

## SUPPORT DIALOGUE, NOT DOGMA

DISCUSSIONS about Indian knowledge systems (IKS) resurfaced after the University Grants Commission released its draft Learning Outcome-based Curriculum Framework, which aims to embed 'ancient Indian wisdom' across subjects. While the UGC has invited feedback on the framework, the draft is attracting scholarly criticism. Beyond its content, critics note that the framework abandons the multidisciplinary and holistic course model envisioned by the National Education Policy (2020), instead prioritising single-major pathways. With most credit allocated to discipline-specific courses, the framework leaves little room for multidisciplinary exploration.

While the goal of multidisciplinary education appears increasingly elusive, the LOCF continues to support the NEP's flagship programme, IKS, through the inclusion of 'Bharatiya philosophy' across modules. To 'decolonise' and 'indigenise' education in India, the curriculum proposes, among other things, the study of Kautilya's *Arthashastra* in commerce education, and the integration of ancient Indian conceptions of *paramanu* (atom) into chemistry. While the UGC's endeavour to reclaim India's ancient heritage may seem commendable, it raises deeper concerns about the erosion of scientific temper, risking an epistemic crisis.

The foundational principle underpinning IKS—Hindu exceptionalism—is not a recent development. Meera Nanda notes that the idea of Hinduism as a 'religion of science' has nearly a two-century-long history; one that exalted the Vedic tradition for its supposed "nondogmatic rationalism" and "super-sensory empiricism". Swami Vivekananda most famously articulated this vision of modern science as a handmaiden of Hindu tradition in his 1893 address in Chicago. The confluence between Hinduism and modern science gained momentum during British colonial rule—caught in the tussle between rationalism and nationalism, self-critique and self-assertion, and reform and revival.

In independent India, the constitutional commitment to scientific enquiry is not enshrined in any grand clause, but rather embedded in the language of the Directive Principles. While Nehru's solemn invocation of 'scientific temper' imagined science as a vehicle for national development, this vision soon gave way to inertia. Beyond a brief period of re-

form and self-critique, the Indian State lacked the political will to cultivate the social conditions necessary for fostering a new way of thinking among the masses. Nor did it succeed in realising the constitutional vision of science as a normative enterprise—one that should be practised, safeguarded, and subjected to critique within democratic institutions through active civic participation.



UGC's proposal to embed Indian knowledge systems across subjects goes against the National Education Policy's multidisciplinary model. It ignores the philosophies and practices of non-Hindu traditions and tribal communities. It's also not aligned with the constitutional commitment to scientific enquiry

However, for a nation emerging from the shadow of colonial rule, independent India struggled with questions of authority, legitimacy, and the preservation of its ancient traditions and knowledge systems. In the effort to decolonise the 'Indian mind' from the lingering effects of colonialism—particularly in the epistemic realms of law, scholarship, and culture—the Sanskritisation of modern science took centre-stage. This process aimed to validate, but rarely challenge, the epistemic claims of Hindu exceptionalism. Such a decolonisation project risks ignoring the Constitution's vision of a citizen-centric science that thrives on dialogue and dissent.

At its core, this decolonising project

commits an ontological fallacy: it seeks to universalise a single, privileged mode of knowing, one that is predominantly aligned with upper-caste Vedic and Sanskrit traditions. This endeavour portrays a static and selective portrait of ancient India, which systematically marginalises the subcontinent's rich heterodoxy—including the materialist and agnostic schools of Charvaka, Buddhism, and Jainism. The IKS also erases the profound contributions of Muslim scholars that were integral to the development of India's cultural syncretism.

Contemporary anxieties regarding the preferred version of 'ancient Indian wisdom' stem directly from this drive for conformity and the assertion of a singular, infallible knowledge system. This attitude is fundamentally antithetical to the critical pluralism and intellectual contestation that are the very bedrock of scientific enquiry.

The decolonial preoccupation within IKS scholarship often overlooks the rich reservoir of living Indigenous pedagogies. IKS must engage directly with the practices and cultures of early often understudied, tribal communities. While aiming to decolonise education by engaging with long-marginalised epistemic traditions, UGC's proposed curriculum risks replacing one form of intellectual hegemony with another. Instead of liberating thought and nurturing critical enquiry, it may mould young minds to adhere to a nation defined by a monolithic history.

This approach creates a tension with the constitutional duty of the citizen, as outlined in Article 51(A)(h), to "develop the scientific temper, humanism, and the spirit of enquiry and reform". The imperative to include indigenous knowledge is vital; however, the uncritical prioritisation of a singular knowledge system veils into ideological indoctrination. Upholding the constitutional mandate demands a commitment to democratic engagement. Science and philosophy must remain in the crucible of open debate, dissent, scrutiny, and reform, ensuring they serve as tools for enquiry rather than instruments of dogma. (Views are personal)

### MAILBAG

WRITE TO: letters@newindianexpress.com

#### Fan frenzy

Ref: Lesson from Karur (Sep 29). This tragedy is another grim reminder of misplaced fan adulation and the dangers of mixing up 'teel' and 'real' life. Unless frenzied fans de-hyphenate subjective interpretation of on-screen characters from the objective reality of life, such unfortunate incidents are bound to recur.

Biju C Mathew, Thiruvananthapuram

#### Smart thumbs

Ref: Grip gaffe (Sep 29). A few years ago, bus drivers were provided with damp sponges to moisten tickets instead of using their tongues. Who knows, someday there might be an 'intellectual sponge' on the market for newspaper readers—especially those who borrow papers from neighbours—guaranteed to keep your pages safe and your thumbs smart.

S Sundareswara Pandiyan, Chennai

#### Policy push

Ref: Blame policy failures, not the courts (Sep 29). The judiciary is an inevitable component in a country that develops, especially at the time of crucial all-round developments. Prolonging in settling issues related to development policies would be troublesome to the implementer of the policies.

Ravi Naik, Palakkad

#### Supreme form

Ref: Vaakram beyond India (Sep 29). That other 'South and Southeast Asian' tradition, celebrate Goddess Saraswati in different forms made for an enthralling read. The Vedic inclusion of a composition by a woman seen after a goddess indicates respect and honour for women.

R Sampath, email

#### Stamped axiom

Ref: Blame game begins as Karur toll rises (Sep 29). Whether it's a victory parade or political rally, it's a no-brainer that tens of thousands of people are likely to turn up. Despite this writing on the wall, the authorities act perfectly, leaving the common people to fend for themselves. It's better to be proactive rather than reactive.

Aamya Singhal, Noida

#### Cricketing spirit

Ref: Tilak & spinners guide India (Sep 29). The much-anticipated cricket clash concluded with a nail-biting finish, where India emerged victorious. However, the game's true spirit was overshadowed by political undercurrents and off-field controversies.

S Valthianathan, Madurai



## Contemporary Art, India's New Aesthetic

More artists needed to broaden market

Auction house Saffronart's 25th Anniversary Evening Sale last Saturday was a gilded frame-worthy moment, stacking up as it did ₹355.77 cr in sales and setting a global record for South Asian art. It was symptomatic of Indian art currently smashing records as more money chases works of top artists. The price signals are becoming stronger in the most selective of contemporary artists. This is being driven by a combination of rising affluence, a younger and more cosmopolitan clientele, and rising awareness of art as an asset class. The market, however, needs to broaden to cover a larger pool of artists. It will then work as a clearing mechanism for a relatively untapped segment. The social, financial and artistic values of owning art must be better aligned to serve as a factor shaping the supply response.

Turnover in the art market is growing through higher volume rather than price. Randomness in being 'discovered' results in oversupply at any given price. Correcting for this requires a deepening of the market mechanism through institutional capacity. A growing mass of investors can pull more art into the market, making the process self-sustaining. This applies particularly to traditional art, where the pipeline is wide but the price signalling is not as robust as in contemporary art. The good news is the notion of art as investment is contagious among the newly affluent. Spillover from contemporary masters to the lesser known may be slow, but it is happening.

Indian art is undervalued by international benchmarks. This should keep returns on investment lofty for an extended period. Financial value of any investment in art is strongly correlated with the social value of art ownership. This element is rising across income levels. As Indians travel overseas in larger numbers, they are exposed to the social and aesthetic relevance of art available at home. They represent a new class of buyers raring to set new benchmarks in pricing local art. A new aesthetic is emerging.

## A Trump Follywood Production

In a move that feels less policy, more Indian state government executive order to 'save the local film industry from hegemonic Hollywood (and Bollywood)', Trump has announced a 100% tariff on 'any and all movies' made outside the US. Claiming that the US movie-making business is being 'stolen' by other countries, the communist president with an American accent is once again playing to his MAGA box office.

This is protectionism as projectionism. Trump's cinematic nationalism echoes the logic of most of our state governments that have, for years, taxed extra films not in their regional languages. But Trump's latest tariff tantrum takes this provincial paranoia global, and in an industry that is more globally connected than ever. Imagine charging double for films like Amélie, Pan's Labyrinth or RRR because they're not 'American enough'. In any case, the global film industry has increasingly become the opposite of geopolitics: more location-agnostic, with various aspects of a movie being sourced in different parts of the world for reasons of economy and talent. Animators from Chennai, coordinate with production crews from Barcelona, who fit into an FX team from Santa Fe, with a lead actor from Wales, with the story set in China.

Hollywood itself has been an ardent student of global content. Tarantino borrows from Kurosawa, Nolan shoots in Mumbai, and Marvel films rake in billions from Chinese audiences. This tariff won't 'revive' American cinema in a world where other hubs of production have emerged. It will make Americans pay more to see 'any and all movies' including those made 'at home'. In the age of streaming shows and movies, Trump's latest swadeshi strike smacks of a 20th-century fox, an era where America seems headed.

**JUST IN JEST**  
Hide from the over-enthusiastic barging in and dousing you with 'fun' advice

## Beware of the Energy Vampire This Season

If you consider yourself an extrovert, this may sound like an anti-social's rant. But if you're an introvert, or a card-carrying member of the latest swiss cheese, 'otrovert'—a person who feels a sense of being a 'perpetual outsider' to any group while still desiring genuine connections—read on. Years of stealthy people-watching have trained you to spot a rare species: social/energy vampires.

Energy vampires are people who don't stroll into your life, but barge in as if they own you. They are unfatigable in a New Year Eve party-high mood, even on a bleak Monday morning. Once they have made themselves at home—at your home—comes Step 2: they download all that you've been doing in the last two days or two hours, while you clutch your coffee tightly and wonder what just hit you and sucking you dry like an emotional vacuum cleaner. Beware. It's an energy-sapping list. And just when you think you've heard all, they will grill you about your no-plan days, insist you have a 'healthy' social life, and drop hints that you are underachieving at the very art of living itself. Be warned. This species gets extra wings and mega dose of mojo during festivities, and the silly season has barely started. Here's our two bits: make a swift exit/lock your doors, and let the storm blow away. Until the next enthusiastic barging in with fanfare and advice.

Agentic commerce will transform shopping into personalised buying – brands must adapt fast

## Sir, a Great Artificial Choice...



Jaspreet Bindra

Agents have already started infiltrating our work lives, with Zoom's virtual agent making summaries and action points for meetings, and Deep Research (DR) agents doing the job of market research firms while humans do other work.

Arguably AI agents will reshape commerce and retail most profoundly by much like e-commerce transformed physical shops. Beyond changing how we buy and sell, they could unlock one of the biggest revenue streams for AI firms.

Buying a book online with the help of 'suggestions' was once a matter of experimentation. It was not without glitches. But it is surreal to see AI making purchases in real time on one's behalf. Beyond online books, agents will help us auto-replenish regular consumables at the best prices by reading our purchase history and placing orders just as we're running out.

If your Outlook calendar shows a friend's birthday in two weeks, the agent will note it, suggest a cake and flower options within your usual price range, and ship them.

Perplexity AI's Comet browser, launched in July, has the explicit goal of turning browsing into doing: query your calendar, email and the web, then complete tasks end-to-end.

OpenAI is reportedly building integrated checkout aisles. ChatGPT and Expedia revenue share on purchases, shifting the chatbot from recommendation to retail. It's no coincidence that OpenAI appointed former Instacart CEO Fidi Simo as CEO of



No more window shopping

Applications. Amazon's Rufus is now a mainstay in app-shopping assistant. Microsoft's Copilot can take actions on 'most websites', including booking and buying, and Google's new AI Mode adds price-tracking and agentic checkout in some markets.

Consumers are also changing how they find things. Gartner projects a 25% drop in traditional search volume by 2026, as discovery is moving from '10 blue links' to 'one good answer'. Perplexity calls itself an 'answer engine', not a search engine. Rather than searching for a mobile phone and wading through reams of phones and features, customers are asking chatbots to give them an answer and discovering what they want to buy through a natural conversation with an 'expert'.

Logically, the next step would be for them to buy the phone. Liked from the conversation window. Buying with agents is not just about typing the product name into a box. These systems will fuse semantic 'cutoff' for a traditional Indian wedding in Jodhpur (in October) with personal context (budget, size, past orders), then act open retailer pages, compare specs and delivery win-

dows, add to cart, and hand over for one tap confirmation. Or, even complete the purchase, even inside the assistant.

Agentic commerce (a-commerce) heralds a transformational moment for brands. Decades of SBO (search engine optimisation) and SEM (search engine marketing) expertise will gradually give way to what is beginning to be called AEO (answer engine optimisation): how to be spotted and recommended by AI. Startups like Profound, Refine and Algolia are emerging to monitor brand presence inside AI answers.

When the surface becomes a conversation, structured, machine-readable data beats glossy lifestyle copy. Agents prefer precise attributes—weight, durability, return policy, sustainability scores—over slogans. They reward speed. AI sees sites rank higher for bots, not just humans.

Thus, the new a-commerce sites will have standardised product data, write with semantic intent ('ultra-light trekking shoe under 400g, monsoon-ready size 9') instead of keywords, and make pages load faster. Otherwise, bots will move elsewhere and explore machine-friendly offers.

It gets weirder: If you have an AI agent shopping for you, brands will field AI agent ambassadors that can answer them in machine terms and language. So, your AI (with your constraints: budget, sustainability, warranty delivery window) will talk to a brand's AI with margins, inventory, promotion levers. They will bargain on bundles, delivery swaps or extended warranties, and close a deal after lightning fast exchanges.

Naturally there are ethical implications around a-commerce. Will buyer and seller agents negotiate transparently or conceal bias in favour of 'afford me'? How will consumer consent, privacy and data use be safeguarded? Who bears liability when an agent makes a harmful or manipulative choice? The risk is a shift of power from people to optimising algorithms, demanding accountability, fairness and clear audit trails so commerce serves humans, not just machines.

A-commerce is inevitable, as discovery and search move to AI engines, and companies like OpenAI search for new revenue streams to offset their eye-watering costs. The second wave of retail made webites the storefront. The third wave makes AI chatbots the storefront and AI agents the buyers on your behalf.

However big e-commerce has become, scrolling through screen of dead products is not a natural way to buy.

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The writer is founder MD, The Tech Whisperer

## ChatGPT SHAIPI OF THE DAY

A match once meant bats, balls and rooting. Now, drones do the boundary patrolling and shooting. The scorcard's a mess, LBW's anyone's guess. And the man of the match needs recruiting.

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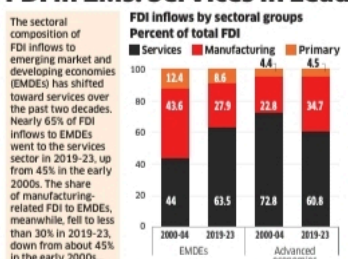
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## FDI in EMs: Services in Lead



Note: Stacked bars show sectoral FDI shares in total FDI for the period indicated. Sample includes 32 advanced economies and 86 EMs.

## Don't Be Bile, Deregulate



Dhiraj Nayyar

Of late, there have been several parallel drawn between India's 1991 moment and where it stands today. None can seriously argue that India's economy is in a crisis today even if Trump tariffs pose challenges. What motivates the comparison is a strong desire for another bout of economic reforms.

In their essence, 1991 reforms were about decontrolling the economy; 2025 reforms must be about deregulation. Ironically, the regulator commission is a strong desire for another bout of economic reforms. In their essence, 1991 reforms were about decontrolling the economy; 2025 reforms must be about deregulation. Ironically, the regulator commission is a strong desire for another bout of economic reforms.

One can't be sure about the fate of the promised De-regulation Commission. What we do know for certain is efforts being led by Cabinet Secretary T V Somanathan, and his predecessor and now

NTTI AGM member Rajiv Gauba. The recently constituted high-level committees (HLCs) headed by Gauba—on 'Implementation of Viksit Bharat at Goals', and 'Non-Financial Regulatory Reforms'—have asked all ministries to submit their institutional reform priorities, five-year plans and priority big-ticket projects, along with targets and deadlines for implementation. The Somanathan-led exercise has been working for several months with a reported focus on nudging states to implement deregulation in areas like land and labour.

Perhaps that is the differentiator between the two efforts—one working with states and the other with the Centre. While every exercise towards deregulation is heartily welcome, it is worth pondering over the method being used: government task force committees. Of course, both Somanathan and Gauba are highly competent and eminent civil servants, with reformist outlooks and lengthy experience in both Union and state governments.

Importantly, Somanathan is, and Gauba was, head of IAS. So, what they say ought to matter to their fellow officers. In theory, it's also a good idea to adopt an inclusive approach to reform, with onboarding Union ministries, state governments to the effort in the hope that they take ownership of deregulation in their respective domains. That is one way to achieve sustained and irreversible deregulation.

But there are downsides to such an approach. Any task force or committee headed by 'insiders' is likely to see a greater role for government than may be required. This isn't because of individuals but the DNA of civil service. Institutionally, India's civil service is designed and geared to control. It reluctantly agreed to the 1991 reforms because there was a crisis and because decontrol was traded in for regulation. The latter helped maintain more than a semblance of government oversight

in the economy. Now, if regulation is surrendered, then what can be obtained in return?

There is also a limitation in asking ministries to list out their priorities and targets. Inevitably these will be full of groupthink and conventional wisdom. In fact, in the garb of goals for 'Viksit Bharat', there may be a creeping extension of Go's role, rather than a curtailment. At least from ministries.

Also, such exercises tend to be exhaustive. There is a creditworthy thoroughness to such efforts. So, there will be reports running into hundreds of pages—look at some of old reports of Administrative Reforms Commission—which bundle together the handful of game-changing reforms with hundreds of trivial ones. Very few recommendations will be eventually accepted. And they might be the trivial ones.

A more efficient exercise would be to set up a short-term Deregulation Commission chaired by an outsider, but with representation from all stakeholders, including government, with a 3-month mandate. Such a commission could recommend 25 changes at central level and 25 at the state level. And, Go, led by reformists, does like Somanathan and Gauba, could implement the reforms—the much harder part than making recommendations.

In fact, the commission can be leveraged by insiders like corporation lawyer management consultants, or the P V Narasimha Rao government leveraged IMF in 1991—to create a distance between themselves and what they are implementing, thereby loosening resistance. A rapidly evolving global scenario, for India's growth, requires a rapid response. Go is willing. The right approach can yield quick results.

The writer is chief economist, Vienta

## Bell Curves

By R Prasad



The monsoon has retreated. See you next year.

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## THE SPEAKING TREE

## Leading The Change

YOGI KRISHNA

There is an ancient Indic saying: 'Parivartanam eva shramas asti,' the only thing that does not change is change itself. This truth underlines inevitability and constancy of change, but depth and continuity of change escape perception. Indic wisdom has always approached change with sapience and foresight. Consider the Sanskrit term 'jagat' that means the phenomenal world derived from the root 'jagat' which means 'to move', meaning 'that which constantly moves'. One moment it is born, and the next it is gone. The very idea of the world jagat, therefore, embodies dynamism and flux.

In the Bhagavad Gita, Krishna explains: 'Deshino asman yutha dhe karmasam sauravajasa, tadha dehantara-praptir dhish ta na mahyat'. This verse teaches us to see change, whether physical, emotional or situational, as natural and inevitable.

Buddha also highlights varying nature of all formations through the doctrine of anicca, impermanence. Sankhya wrote: 'Ka kachu kachu thira na rabhi'—what abideth ask for from the Lord, when nothing is permanent?

These timeless insights should be the foundation for modern change management. Broadly, there are three possible responses to change. First, be oblivious to change and eventually become a victim. Second, manage and endure change—recognising and responding to it helps one adapt, but only reactively. Finally, leading the change is the most enlightened approach, where a leader proactively shapes and directs change.

## Chat Room

## Bright Present, Brighter Future

Apropos 'Second-Guessing the Go' by Mythili Bhuvaneshwar (Sep 29), RBI will have to accelerate economic growth while controlling inflation. External front shows unexpected rise in gold prices, strained US trade policies-induced tariff hikes, and geopolitical risks created uncertainties, while at home, high-frequency indicators are registering better y-o-y growth rates except petroleum consumption. The reduced GST rates will take care of the inflation if the effects are passed on to the customer. 'I'll be falling rope finds its natural value against the dollar. RBI can provide a temporary buffer. It is now need to be self-reliant. It is the perfect time to reduce the repo rate, and SLR and CRR, to the minimum extent possible. Shishir Sankar Naskar

## First a Palliative, Then a Curative

This refers to the Edit, 'US Tariff a Bitter Pill For Indian Pharma' (Sep 29). The imposition of 100% tariff by the US on branded and patented medicines poses a major challenge for Indian pharma as its 40% exports are bound for the US. In addition, intensification in the drug industry will alter materially in 'real' time. China switching priority to drug discovery, the US action will force India to explore other markets. Patent expirations will have a major impact on the global pharma industry. The sea change in the sector needs to be tackled fast. Vijay Mulgiri

By email!

## Got the Cup on a Silver Platter

Apropos the news report, 'India on Cloud 9' (Sports World Play, Sep 29), the Indian team's victory in the T20 World Cup is a remarkable feat. The team's performance in the tournament and emerged victorious every single time to remain the only unbeaten team in the championship. Pakistan had a promising start in the finals but just asked right away. It is the Indian team is the best T20 side in world cricket but needs some fine-tuning to prepare for the T20 World Cup that is coming our way in less than 6 months. S N Kabra Mumbai

Letters to the editor may be addressed to editor@timesofindia.com





### A thought for today

The most common way people give up their power is by thinking they don't have any

ALICE WALKER

## DIP-LOW-MACY

Like his boss, US commerce secy trash talks & overestimates the importance of his country and the power of its tariffs

On Sept 20, 1812, Napoleon sent a letter to Tsar Alexander I: "Dear sir, my brother...I started a war against your Majesty without anger; one note from you before or after the last battles would stop my procession..." This was days after the French had captured Moscow, but unlike Trump aides Peter Navarro and Howard Lutnick, Napoleon didn't forget his manners. While Navarro's impertinence can be ignored because he's only an adviser, the US commerce secretary saying India, Brazil and Switzerland — all friendly countries — need to be "fixed", and will be "sorted out", reflects a lack of schooling in the traditions of diplomacy.

There's a reason that diplomacy — the art of managing relations between countries — demands high refinement of language, unless you're Hualago or Kublai Khan shooting off threats. The whole point of diplomacy is to achieve ends without war. Unlike domestic politics, where coarse rhetoric embitters but has few consequences

otherwise — Trump probably won't miss invitations to Clinton, Obama and Biden family dinners — in the international sphere it can, for example, harden India's resolve to continue buying Russian oil, and hurt US farmers because China decides to source more corn and soy from Brazil.

But verbal temperance is a virtue Trump's administration has forgotten. The president's sluggish White House receptions, starting with Zelenskyy

in Feb, will find a place in textbooks. Vance and other Trump deputies have tried to outdo each other in these displays of boorishness. Perhaps, these are acts meant to signal strength to MAGA voters, but when domestic politics taints diplomacy like this, the outcomes can't be wholesome. US is undeniably the richest country in the world, and probably the most powerful militarily, but that does not mean it can coerce others into doing its bidding.

Trump's "trade deals", forced with the threat of tariffs, may have given him an illusion of almighty power, but the biggest ones with Japan and S Korea are already looking shaky. Meanwhile, he's been completely ineffective in international affairs. Gaza and Ukraine aren't any safer than they were before his inauguration in Jan. It's one thing to take shots at Venezuelan boats, quite another to "fix" India. So far, steep US tariffs have affected \$48bn worth of Indian goods exports, which is only 5.8% of India's \$825bn worth of total goods and services exports last year. Lutnick is not out of line but also out of his depth.

## Art Of The Matter

Why's there such a mismatch between India's cheerful festive aesthetic & its dreary public spaces?

Every Indian festival is a splash of colours and art. New attire, kitschy to bling to charming aesthetics. Feasts where display is as much art as culinary delight. Lights, warm glows to flashy neons. All gone when festivities end and cities crawl back to littered dreary reality, a bleak everydayness. Newfangled buildings are an eyesore, essential internet connectivity is a birds' nest of ugly cables, grey skies despair; traffic woes are soul-destroying.

India is her artisans, and her diverse architecture styles, sustainable designs tailored to local climatic concerns. So it is a tragedy that such master craft — art to climate-resilient architecture — retained by families and communities has been allowed to decay

into being tourist curiosities. If only these were standardised, modernised and codified to allow the principles and practices to be taken to cost-effective scale. After all, it is this very art and science that still shape campuses of every festival. Instead, we must tolerate the rash of energy-guzzling office buildings and claustrophobic housing complexes. But it's never too late really to infuse urban sprawls with a dash of life and soul.

No one is asking for ambitious plans like Saudi Arabia's placemaking cities — futuristic, theme-based mega projects to make 'liveable cities' designed to reshape the kingdom. But look to Albania — where artist PM Edi Rama is known for his singular artistic approach to urban development. Outcome: grey uninspiring cities painted over to look pretty, public spaces reclaimed and rebuilt, projects that resulted in residents feeling pride in their city. People even littered less. Safe to say no Indian can be accused of any twinge of pride in any city — it's all a concretised grimace. Does it have to be this way? Most certainly not. Our festivals, barring the noise, tell stories. There's no reason our cities can't. It only needs imagination.

## Crowning glory

To dye or not to dye that is the question

Anil Abraham



Monday mornings are always crowded at the clinic. As I glanced up at the clock, Babitha Bhabhi bounced into the consulting room. "I'm losing my hair, doctor! There's hair on my hairbrush, there's hair on my bathroom floor, there's hair in my husband's butter chicken! There's hair everywhere — except on my head! She ran her hand through her generous tresses and showed a bunch of limp hair glaring accusingly at me from her palm.

I went through my checklist for patients with hair loss: thyroid issues, low iron stores, a severe crash diet or religious fasting, sleep disturbance, a recent illness or a possible hormonal issue. She had also done her homework and brandished a long exhaustive list of tests and results from the neighbouring lab. "I'm going to have less hair than my husband, doctor. Do something!" she complained nervously. I checked about stress, but she assured me that her husband was still on H-1B visa and even Trump's shenanigans had not brought him back. "No stress, doctor — he is still safely abroad for the time being."

When I examined her scalp carefully, the answer became obvious. An allergy to something she had applied. She confessed to a visit to the beauty parlour because she was dying to look younger. She was not ready to be Fifty Shades of Grey yet. But because of the reaction to hair colour, I gently suggested that she age gracefully. She was not pleased with my prescription. "Even my parents have jet black hair, doctor! I'm not ready to be called aunty!" She was scandalised at the thought of choosing between Bald and Beautiful. I reiterated that she had an allergy to hair colour and avoiding the cause would be the best solution. "Delulu is not the only solulu," she muttered under her breath as she listened to my colourless alternative.

A week later Babitha Bhabhi breezed into the clinic looking very happy. Her crowning glory was a flaming red-orange colour. "Orange is the new Black, doctor," she declared. And she had another surprise on hand: her new phone in a shade that could only be described as cosmic orange. How was it any different from her previous phone, I asked innocently. She told me not to go comparing apples and oranges. *Mera rang de basanti chola* she hummed patriotically as she sashayed out of the clinic.

## Teaming With T20 Takeout

That India won Asia Cup despite Bumrah's bowling & Surya's batting being below par, shows the team has cracked the ultra-short format code

Anand Vasu



Asia Cup 2025 was many things, but, to this Indian team it was the laying down of a marker. They had cracked the T20 code, identified the personnel that would buy into this philosophy without any second thoughts and go out there and execute, irrespective of what else was happening around them.

India were not early adapters to the T20 way of attacking from the word go with no thought to keeping wickets in hand. India built their early T20 teams around their star batsmen, as they had



done with other formats of the game. But, with iterations and changing captains and coaches, they constantly refined the approach to one where no backward steps would be taken.

Two at the top | Suryakumar Yadav has a manner about him that suggests he is a mischievous one. Cameramen following him on the field need not search too hard or wait long: a meme-worthy expression is always around the corner. But, don't let this fool you. Surya thinks deeply about the game and is very much a leader in charge. He takes the calls on the field, sometimes unusual ones, and backs them to come good.

Gautam Gambhir might have been all smiles once the tournament was won, but his anxious presence outside the dressing room was a constant one. Gambhir is always thinking about the game, about preparation and about which men might be best suited to do the job. His decisions are not always easy to understand or popular, but he has clearly forged a winning partnership with Surya.

Potential to performance | In a crowded field of achievers, Abhishek Sharma has already shown that he is the man to watch. Abhishek's ball-striking ability was never in doubt, but translating that into match-winning knocks is another thing. Abhishek showed that he is not just that someone who sees the ball and hits it — that clarity of mind is hard enough to achieve — but someone who can quickly and accurately read the game situation and conditions, using that to his advantage.

Abhishek does not merely set up games at the top of the order; he finishes them, for all practical purposes. Abhishek is fully aware that the licence he gets at the top of the order is not a free pass to just hit everything out of sight, but rather an invitation to maximise his impact, betting with true fearlessness. In the past, he may

have looked a million bucks, but now he is worth that to his team.

The reality of depth | When a team moves on from the likes of Virat Kohli and Rohit Sharma, there is bound to be a vacuum. The combination of skill and experience that veterans of their kind bring cannot be replicated by the exuberance of youth alone. Yet, there was a firm belief that the time had come to move on, not just from them, but from a philosophy of play where the batting revolved around an anchor.

Now, India have genuine trust in the likes of Tilak Varma to deliver games for them. Tilak's graph has not been the most straightforward, but in T20 cricket,

he has never marshalled anyone on a field, could have reached out to the White House to ask it to cut off live telecast and see Pakistan took 6 wickets for 0 runs in the final over, and declare a win. Then he could have nominated the Boss for man of the match, and blessed him with cryptocurrency and rare earth elements.

Instead Pakistan is now on its way to United Nations to demand a plebiscite to decide who won, alleging India is not in possession of the trophy. It has also sought China's intervention, but Beijing asked it to do the decent thing and send the cup to India, pledging it will give Pakistan many replicas.

Separately, Pakistan has also gone to UN Human Rights Commission (UNHRC) accusing India of terrorism

where calculated risk is the byword, there are bound to be days, even patches, in which a proven strategy does not work simply because the opposition is too good. But, overall, the numbers will always justify the investment. Tilak has shown that.

Bowling for glory | T20 cricket always appears to be a batting game, with the biggest hits and the highest strike rates capturing the imagination. But the best bowling attacks do not allow the opposition to run away with things. India now has this trait.

Jasprit Bumrah walks into all teams in the world, in all conditions and formats, but he had a rare outing where the numbers did not stack up as they usually do. But, India were not defeated by this. Bumrah still gave the team the tough overs in the lower play and then in the death overs.

Around him, though, Hardik Pandya was built to be the true all-rounder he has been built up to be. Arshdeep Singh delivered accuracy and calm when called up to, and Shivam Dube showed that even with a reduced Indian Premier League workload thanks to the Impact Player rule, he still gives the team enough with ball and bat.

Spirit to win | Through five Test matches in England, Kuldeep Yadav watched from the sidelines, unable to play a part. But when he did get the chance in the Asia Cup, Kuldeep was comfortable in leading the attack. The choke he brought to the middle overs, along with Varun Chakravarthy, meant that the opposition could not crack, irrespective of how good a start they had got.

India showed, through the Asia Cup, that they have all the boxes ticked in the shortest form of the game. All that remains is for Surya to score some runs, and then this will be the team to beat.

### Calvin & Hobbes



### Sivakumar Sundaram

The feminine is a powerful dimension of life. Without Shakti, nothing in existence would exist. If the masculine is the seed of stability, the feminine is the flow of creation. The two are not opposed forces but complementary like the root and the flower, the sky and the earth, the silence and the song. When one dominates without the other, imbalance is inevitable, competition without compassion becomes destructive, while creativity without discipline drifts without direction.

Navratri is that sacred pause in the year when we are invited to awaken the feminine within us. For nine nights, nature itself is in transition, old leaves fall, the air shifts, and life quietly prepares for renewal. In our spiritual traditions, creation is cyclical, not linear. Matter dissolves only to reappear in fresh form. Navratri aligns the human mind to this

cosmic rhythm, guiding it back to its Source, where both the masculine and the feminine dance in harmony.

Kali, fierce yet maternal, embodies this paradox. She destroys not out of anger, but with the impartial force of nature itself. Like the clearing fire that makes way for fertile soil, To see her as fierce and aggressive is to look through the lens of fear. In truth, she is a reminder that destruction, too, is part of creation, and courage is sometimes the most compassionate act.

Across cultures, the sacred feminine has always been revered. The Greeks saw it in Gaia; the Earth Mother whose womb sustains life. Indian philosophy recognises the feminine as play of the three primordial gunas: sattva, rajas, tamas. The Mother Divine is not only brilliance but also confusion, not only abundance but also

### THE SPEAKING TREE

During Navratri, this transformation is almost palpable, anger dissolves into calm, fear into peace, weariness into joy. This is why Navratri is not merely ritual but inner science. By raising our pran, our life-force energy, we overcome the inertia of Mahishasura; we overcome resistance within us which clings to comfort and refuses growth. We dissolve

## Qaum Before The Storm

Pakistani cricket or 'kirkit' is deeply influenced by the deep state that runs the country. Here's a funny take on a serious problem

Chidanand Rajghatta



Pakistan blew several chances to win the Asia Cup on Sunday. Not because of lousy batting, dropped catches, missed run-outs, or poor bowling. It passed up the chance to call Washington and seek intervention so it could declare victory.

There were so many opportunities. At 113-1 when Pakistan was batting, at 20-3 when India was batting, even in the last over of the game when India needed 10 to win.

The Field Marshal, who has never marshalled anyone on a field, could have reached out to the White House to ask it to cut off live telecast and see Pakistan took 6 wickets for 0 runs in the final over, and declare a win. Then he could have nominated the Boss for man of the match, and blessed him with cryptocurrency and rare earth elements.

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by non-state batters like Abhishek Sharma and Tilak Varma, drawn mainly from IPL. It also accused India of torture by repeatedly giving Pakistan hopes of victory before cruelly snatching it away.

"We cannot take this torment any more. Just because I hit a solitary last-ball six 30 years ago to win a game in the desert, there is no need to torture us with defeat after defeat. You have already avenged it in Karachi, Melbourne, Johannesburg and so many places," wept former cricketer Maved Jiandadi, who occasionally won games for Pakistan with the help of umpires.

India has rejected the charges, saying it has tried its best to help Pakistan win on various occasions, including in UAE on Sunday, but their players keep snatching defeat from the jaws of victory. "In fact, the only smooth victory we had was the 1971 win by 93,000-0," an MoD spokeswoman said.

Pakistan has also asked US to include India in the annual religious

"Some of our cricketers like Salman Butt, Mohd Asif, Mohd Amir even went to prison in UK for match-fixing. Have any of your players made such sacrifices?" asked former minister Shriek Rashid, who once said Pakistan winning a cricket game against India is a "victory for Islam", and who was himself in jail recently.

However, Pakistan's Kirkit Board has clarified that Harris Raut's sign of 6-0 had nothing to do with downed airplanes and he was merely asking not to be hit for sixes after the mauling he received from Virat Kohli in Melbourne. Unfortunately, the plea fell on deaf ears of Tilak Varma.

Pakistan's IPSR too stepped in to say it has no proof of even one Indian plane being shot down but it picked out the number 6 in hopes of inspiring the kirkit team. "We also know India cannot score 93,000 runs or take 93,000 wickets, so there was no danger of being troled. It is bad enough being bombed," an IPSR spokesman said.

### Sacredspace



Man's enemies are not demons, but human beings like himself.

Lao Tzu

## Celebrating The Feminine Energy During Navratri

Sivakumar Sundaram

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hunger and thirst. She is the fullness and emptiness, the giver and taker, the beginning and beyond. To worship her is to accept life in its totality.

Modern life, however, is tilted heavily towards the masculine: competition, conquest, control. While these qualities build, they also burn when unchecked. Feminine energy restores balance by bringing creativity, celebration, and compassion. It softens edges of ambition, turning rivalry into collaboration and anxiety into serenity.

During Navratri, this transformation is almost palpable, anger dissolves into calm, fear into peace, weariness into joy. This is why Navratri is not merely ritual but inner science. By raising our pran, our life-force energy, we overcome the inertia of Mahishasura; we overcome resistance within us which clings to comfort and refuses growth. We dissolve

the pride of Shumbha and Nishumbha, the twin demons of ego and arrogance that seek to dominate and divide. And we silence the restless pull of Madhu and Kaitabha, those forces of craving and aversion that drag the mind between extremes of desire and denial. When these inner demons are vanquished, the path clears for balance, clarity, and joy. Through devotion, wisdom, and selfless action, the three gunas are harmonised, and the dormant Shakti, Feminine energy of creation and compassion awakens within us, irrespective of gender.

To recognise the feminine within is to recognise the Divine in every form, every name, every breath. Navratri is that reminder: that life is not a battlefield alone, but also a celebration. The true victory is when masculine and feminine meet in balance, when power is tempered with beauty, and creation flows in harmony with courage.

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