



## Labour of care

Women who facilitate rural health care should get better wages

For decades, the women who serve as Anshakalin Stri Parichars (ASPs) in Maharashtra have been performing some of the hardest, yet least acknowledged, labour in the rural health system. For a wide breadth of responsibility, their monthly wage has stagnated at ₹3,000 since 2016, decades behind inflation. They also lack job security, pensions, safety gear and travel allowance. In 2023, a labour court in Nagpur acknowledged that they deserved at least the protection of the Minimum Wages Act but left the decision to the State. In keeping with its verbal-only assurances, the State has even now only promised them ₹6,000 a month by December 2025 – much less than what multi-purpose health workers receive. The indifference is not accidental: ASPs, who predate Accredited Social Health Activists (ASHA) and anganwadi workers, have been easy to ignore because they are poor, rural women. Their neglect reveals a gendered and caste-inflected hierarchy of labour within public health, where skilled work is low status and devalued because of who performs it. Their ongoing protests are part of an arc of agitation following similar sit-ins in Kolhapur, Nagpur, Ratnagiri and Yavatmal. In this regard, their plight resonates with that of ASHAs in other States. ASHAs, created under the National Rural Health Mission in 2005, are the community’s first link to the health system and are also officially classified as “volunteers” rather than employees, compensated only through oft-delayed incentives, amounting to less than subsistence. Across States, ASHAs have repeatedly agitated for fixed honoraria, recognition as government staff and social security, and, like the ASPs’ protests, have borne the same refrain: States cannot continue to build their health systems on the underpaid labour of women.

These struggles highlight a structural contradiction. While India relies heavily on women community health workers and attendants to deliver maternal and child health care, immunisation and disease surveillance, especially in rural areas, it refuses to recognise them as workers entitled to minimum benefits and dignity. The reliance is often framed as offering rural women “opportunities” for public service. Yet, in practice, it is exploitation. These women risk snakebite while clearing hospital grounds and death in accidents en route to vaccination duty without insurance or compensation. A health system that does not value the people who keep it functional and link its margins to formal care is bound to sabotage itself. To secure rural health is to secure the rights of those women through living wages, safe working conditions and stable employment.

## Swim to safety

Engagement with fishers can help with marine conservation

Once widespread across the Gulf of Mannar, Palk Bay, the Gulf of Kutch and the Andaman and Nicobar Islands, India’s dugongs dwindled to a few hundred individuals as poaching, by-catch, habitat loss and pollution compounded the animals’ slow rate of reproduction. But, in the last decade, a series of initiatives have signalled a serious, if still inchoate, effort to reverse this decline. The most visible step was the notification of the Dugong Conservation Reserve in Palk Bay in 2022 under the Wildlife (Protection) Act. Protecting over 12,000 hectares of seagrass meadows, it has become a model of integrated marine conservation. Tamil Nadu’s stewardship, bolstered by the Wildlife Institute of India (WII) and local community participation, has mitigated poaching and encouraged fishers to release dugongs caught as by-catch. Now, the International Union for Conservation of Nature has recognised the reserve as an exemplar, lauding its ecological significance and innovative restoration techniques. WII surveys suggest that the population here numbers over 200, fragile but encouraging progress from the fear of extinction voiced two decades ago. India has also experimented with technologies that widen conservation options, which include drone platforms and acoustic and satellite-based mapping of seagrass beds.

Yet, much remains to be done. Even in the reserve, mechanised fishing, port construction, dredging and pollution from agriculture and industry threaten seagrass meadows. Dugongs continue to die in fishing nets. Rising sea temperatures, acidification and storms threaten restoration gains. Populations in Gujarat and the Andamans are also smaller and less protected than in Tamil Nadu. Experts have stressed the importance of cross-border collaboration, particularly with Sri Lanka, since dugongs traverse the narrow Palk Strait. Without shared protection, the recovery will remain local. Funding, too, has been inconsistent: while allocations from the compensatory afforestation fund have helped, the long gestation of dugong populations requires decades of steady investment. These efforts and shortcomings hold broader lessons for the conservation of other marine species that demand intact ecosystems while being directly threatened by human activity. The Palk Bay Reserve demonstrates that community engagement with fishers as partners can mitigate by-catch and create local constituencies for conservation. The IUCN recognition underscores how international endorsement can amplify domestic efforts, offering legitimacy and opportunities for knowledge exchange. Likewise, blending traditional ecological knowledge with technologies such as drones and echosounders shows how conservation can bridge tradition with modernity.

The Union Public Service Commission (UPSC) marks a century of its establishment on October 1. Envisioned by the nation’s founders as a guardian of meritocracy, the UPSC has played a pivotal role in the recruitment, the promotion and the disciplining of officials of the Central Civil Services. Its journey over the past 100 years is not just an institutional history but also a testament to India’s enduring faith in fairness, trust and integrity in governance.

The idea of an independent commission to recruit higher civil servants took root well before Independence. The Government of India Act, 1919, first provided for such a body, and in October 1926, the Public Service Commission was set up, following the recommendations of the Lee Commission (1924) which observed, “Wherever democratic institutions exists, experience has shown that to secure an efficient civil service it is essential to protect it as far as possible from political or personal influences and give it that position of stability and security which is vital to its successful working as the impartial and efficient instrument by which Governments, of whatever political complexion may give effect to their policies.”

Headed by Sir Ross Barker, it began with limited powers, as an experiment under colonial rule. The Government of India Act, 1935 elevated it to the Federal Public Service Commission, giving Indians a greater role in administration. With the adoption of the Constitution in 1950, it assumed its present status as the UPSC. From conducting a handful of examinations in its early years, the UPSC has grown into a premier institution overseeing recruitment for diverse services ranging from the civil services to engineering, forest, medical, and statistical cadres. Its scope has expanded with the Republic, yet its mandate remains unchanged – to select the finest talent for public service.

### The foundation and pillars

If the history of the UPSC is its foundation, the principles of trust, integrity and fairness are its pillars. Over the decades, millions of aspirants have placed their faith in the Commission, assured that success or failure depends solely on merit. This trust is no accident. It has been built painstakingly through transparency in procedure, impartiality in evaluation, and an uncompromising stance against malpractice.

Integrity, meanwhile, has meant protecting the institution from political or external pressures, maintaining confidentiality, and ensuring that those who succeed are genuinely among the most competent. Fairness has also meant providing equal opportunity to candidates from every background, urban or rural, privileged or underprivileged, fluent in English or not. In a country as diverse as India, where inequalities persist, the fact that the UPSC examinations are



Ajay Kumar

is Chairman, Union Public Service Commission (UPSC)

Over the decades, millions of aspirants have reposed faith and confidence in the Union Public Service Commission, assured that success is based on merit alone

regarded as a true “level playing field” is itself one of independent India’s proudest achievements.

This philosophy finds echo in the timeless wisdom of the *Bhagavad Gītā*, where what Lord Krishna says, “*Tasmadsakt statam karyam karma Samachar. Asakto haracharkarm paramapnoti purushah*” can be translated as ‘... without attachment, constantly perform your duty as it ought to be done’.

The UPSC embodies this principle: it performs its duty with rigour and fairness, without attachment to outcomes.

### The ‘Indian Dream’, the complexities

At the heart of the UPSC’s recruitment journey are the thousands of aspiring youngsters who come forward year after year, driven by dedication, perseverance and a dream to serve the nation. Once dominated by a select few from elite urban centres, today, the civil services examination attracts candidates from nearly every district of India, including the remotest and most underprivileged regions. This extraordinary diversity reflects the true spirit of the ‘Indian Dream’ – the aspiration that talent, hard work and commitment can open the doors of opportunity to all.

The UPSC salutes these courageous aspirants and remains committed to reaching every corner of the country, ensuring that every aspiring citizen has the chance to contribute to the nation’s service and progress.

The UPSC takes immense pride in conducting the world’s biggest and most sophisticated competitive examination, the civil service examination, with remarkable precision and consistency year after year. Starting with nearly between 10 lakh to 12 lakh applicants for the preliminary examination, candidates for the mains examination have the option of choosing from among 48 subjects and writing their answers in English or any of the 22 languages recognised under the Constitution of India. The UPSC then evaluates these multiple-subject candidates into a single merit-based ranking – a feat that is unique in its scale and sophistication anywhere in the world. The logistics of the civil services examinations are truly extraordinary.

The preliminary examination is held across more than 2,500 venues nationwide. For the mains examination, the task becomes an intricate challenge in ensuring that each candidate at different centres across the country receives the question paper for the subject they have chosen.

This complexity is further compounded by the special arrangements made for differently-abled candidates. After the examination, answer sheets are evaluated anonymously by top experts in the 48 disciplines, with proficiency in the language in which the answers are written. All of this is completed within a defined timeline, without disruption, even during events such as the COVID-19 pandemic.

# Reclaim the district as a democratic commons



Ruchi Gupta

is the Executive Director of the Future of India Foundation, and leads YouthPOWER, India’s first and only district-level youth opportunity and accountability platform

It is a crucial step to revive national development and the fundamental principles of democratic engagement

than shapers of developmental direction and conveners of public good.

This model is showing strain. Electoral politics has increasingly pivoted to welfare through cash transfers in the absence of meaningful employment. But this approach is yielding diminishing returns as promises multiply while structural transformation remains elusive.

Beneath the surface, there is growing political fatigue, among citizens and representatives, with a system that is struggling to deliver opportunity and ownership. This fatigue is most evident among young people, for whom the promise of mobility collides with the reality of limited opportunity.

### Re-engaging youth, creating opportunity

To truly transform India, we must start from where Indian youth actually live – its districts. Administratively, India has long been district-led but this dominance of bureaucracy means that citizens experience the state primarily as subjects of delivery, not civic participants. To re-engage our youth and create opportunity, we must reclaim the district as a democratic commons rather than just an administrative unit.

If districts were placed at the centre of our civic imagination, opaque national schemes could be disaggregated, silos broken, and outcomes tracked locally. This would make accountability tangible, showing where districts are creating opportunity for youth and where course correction is needed. It would also bring into focus the stark disparities in investment, opportunity and outcomes across districts, enabling more equitable allocation of resources.

This vision builds on India’s democratic structure. Districts already anchor administration, and Members of Parliament (MP) chair committees overseeing central schemes. Linking outcomes more directly to MPs’ constituencies would bring governance closer to the people, incentivise locally tailored solutions and deepen civic engagement. Measurement and

This seamless, time-bound orchestration typifies the UPSC – its ability to manage complexity and diversity with efficiency, fairness, and equity.

As we celebrate a century of the UPSC, it is equally fitting to honour the unsung heroes behind its remarkable success – the paper-setters and evaluators who form the faceless backbone of the Commission. These are some of the finest academics and experts in the country, each a master in their own discipline. Yet they serve with quiet dedication, without seeking recognition or the limelight. This writer thanks every one of them for their selfless service, which ensures that the dreams and the aspirations of thousands of candidates are judged with fairness, rigour and integrity.

Across decades, the UPSC has given the nation civil servants who have administered during crises, managed the economy through reforms, overseen infrastructure and environmental challenges, and contributed in countless invisible ways to nation-building. Their work touches every Indian, even if the hand behind the service remains unseen.

### A series of reforms

As the UPSC enters its centenary year, this moment calls not just for celebration but also for reflection. As India marches toward reclaiming old glory as a leading light of the world, the challenges emanating from global competition and technology advancements are disrupting existing models of governance. As an institution, the UPSC will continuously strive and adapt to these changes to remain current.

As a part of this, the UPSC has already initiated many reforms. The UPSC has a new online application portal for greater ease of application and new face-recognition technology to ensure zero impersonation. Its reforms with examination and recruitment processes are in line with the changing needs of time. The UPSC’s Professional Resource And Talent Integration Bridge for Hiring Aspirants (PRATIBHA) Setu initiative, is facilitating employment opportunities for those who reach the interview stage but are unable to make it in the final list. PRATIBHA Setu has already helped many. Going forward, the UPSC proposes to use digital technologies and Artificial Intelligence, for its efficient and effective working, without compromising on the integrity of the processes and practices.

As Chairman, along with my fellow members of the Commission, celebrating the centenary year at the UPSC, we are humbled and inspired by the strength of our legacy and the faith reposed in the institution by the society at large.

We reaffirm our resolve to uphold and carry forward this gold standard of integrity, fairness and excellence, ensuring that the UPSC continues to serve the nation with the same trust and distinction in the years to come.

accountability cannot by themselves overcome deficits of capacity or political will, but they can clarify problems, surface local innovations and create transparency. Done well, they can build a constituency for reform by connecting elected representatives, civil society and private actors around shared developmental priorities.

### Shared responsibility for inclusive growth

This transformation also demands visible and meaningful participation from India’s top 10% – political leaders, corporate executives and intellectuals. While many profess a commitment to inclusion, translating principle into practice requires specific and targeted interventions.

A district-first civic framework provides a way to do just that. It offers a tangible route for elites to translate good intentions into local action. It reclaims governance as a deeply democratic, grounded process: redistributing power to communities, fostering collective accountability, and bridging the persistent gap between policy design and lived impact. India’s future will not be determined only by economic indicators, but by whether its democracy is responsive to the needs of youth outside urban and elite centres. We already have a district-first bureaucracy. What we need now is a district-first democracy. A district-first approach offers a framework to rebuild that engagement – by reconnecting local political leadership with development outcomes, and placing districts at the heart of democratic participation and economic progress. Most importantly, this framework of local collaboration offers a chance to build tangible common ground that is rooted in a shared love for the country, rather than being drawn into performative or polarising partisanship.

By focusing on India’s districts, we can revive both national development and the fundamental principles of democratic engagement. If we fail to reimagine districts as democratic spaces, we risk not only wasting our demographic dividend but also hollowing out democracy itself.

never visited me. I even filled the SIR form online and uploaded the required documents. My name is in the draft list but not under my village’s polling station.

**Md Sabir Hussain,**  
Arrah, Bihar

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



# The transformation of girls’ education

In a country where the phrase “*Beti padhegi toh kya karegi?*” (What will a daughter do if she studies?)” once echoed through homes and villages, India has undergone a powerful transformation in girls’ education over the past decade.

At a *Mahila Sammelan* (Women’s Conference) in Dwarka, Gujarat, Prime Minister Narendra Modi asked a group of women how many had studied beyond class 5. To his surprise, most of the elderly women raised their hands, while few younger women did. When asked why, they pointed to the era of the Gaekwad dynasty (1721-1947), when fathers were penalised for not educating their daughters. Today, however, many women are literate, while their daughters-in-law are not.

This anecdote underscores a larger truth: good intentions must be backed by accountability, leadership, and policy. And under Mr. Modi’s leadership, India is witnessing just that – a systemic push to change not just rules, but mindsets. This transformation is not just about more girls in classrooms; it’s about shifting the very foundations of Indian society, its health, economy, and demography, by empowering its daughters with the most effective tool of change: education.

**The Gujarat model**  
As Chief Minister of Gujarat, Mr. Modi recognised that tackling issues such as female foeticide and girls’ illiteracy required a multi-pronged approach. Laws alone wouldn’t suffice; a fundamental shift in public perception, supported by infrastructure and incentives, was required. Launched in 2003, the Kanya Kelavani campaign became a key vehicle for this change. The initiative promoted awareness about girls’ education while addressing barriers such as the lack of separate toilets for girls in schools, a major cause of dropouts during adolescence.

The results were significant. Female literacy rate in Gujarat



**Shamika Ravi**  
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which was lower than the national average, increased to 70%, higher than the national average of 64%. The school dropout rate reduced by as much as 90% among female students in targeted districts.

Mr. Modi transformed the policy initiative through widespread public support, by personally auctioning gifts received at public events, raising ₹19 crore for girls’ education. He also made a personal contribution of ₹21 lakh. These efforts sent a strong signal: girls’ education wasn’t just a government scheme, it was a public movement.

**Scaling success nationwide**  
Inspired by Gujarat’s success, the Beti Bachao, Beti Padhao (BBBP) initiative was launched nationwide in 2015. Its aim was twofold: to prevent female foeticide and promote girls’ education. The initiative focused on 100 gender-critical districts in its initial phase and later expanded nationwide. It brought together multiple ministries – Women and Child Development, Health and Family Welfare, and Human Resource Development – in a coordinated push for change. Among other measures of outcome, its impact is most visible in the survival rate of girls. India’s sex ratio at birth improved from 919 girls per 1,000 boys (2015-16) to 929 (2019-21). Encouragingly, 20 out of 30 States/UTs are performing better than the national average of 930.

But these improvements in sex ratio at birth are encouraging, they are just one piece of a much larger puzzle. The real power of girls’ education lies in the ripple effects it triggers across society. Educated women tend to marry later and have fewer children. India’s Total Fertility Rate has dropped to 2.0, just below replacement level. This shift is closely tied to rising female education and workforce participation. Women with secondary education are more likely to seek institutional deliveries and prenatal care. The

Infant Mortality Rate for girls has dropped from 49 per 1,000 live births in 2014 to 33 by 2020. While overall female labour force participation remains a challenge, it is rising in sectors such as healthcare, education, STEM, and entrepreneurship – fields that thrive on literacy and skills. From officers in the armed forces to CEOs of tech startups, today’s educated Indian women are breaking barriers.

**The multiplier effect**  
Educated girls grow into educated mothers – and that changes everything. Studies show that children of educated mothers perform better in school and experience better health outcomes. In Madhya Pradesh, recent surveys show that 89.5% of people are aware of BBBP, and 63.2% say it directly encouraged them to send their daughters to school. Communities reported increased support for delaying early marriage and promoting girls’ higher education. These statistics reflect changing mindsets in regions where girls were once kept from schools entirely.

This transformation is a deep-rooted change facilitated by thoughtful and effective policies aimed at empowering young women. The long-term impact of these initiatives will be even more pronounced because of the positive feedback cycle that enhances not only individual lives but entire communities. Today’s educated girls are not merely students; they are potential leaders, advocates, and change-makers of tomorrow. Educated girls are more likely to join the workforce, contribute to their families’ incomes, and invest in the education of their children.

As we look to the future, we can be hopeful that the changes initiated under Mr. Modi’s leadership will continue to gain momentum, leading to a more equitable society where every girl has the right to learn, grow, and thrive. Let’s be clear: when you educate a girl, you save a society.

# What triggered the chaos at Karur

The stampede occurred due to poor planning and leadership

## STATE OF PLAY

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The predictable blame game has begun over the stampede that took place on September 27 in Karur district of Tamil Nadu. The death toll at the stampede, which occurred at an overcrowded roadshow held by Tamilaga Vettri Kazhagam (TVK) founder and actor Vijay, has climbed to 41.

The common refrain among the people is that “it was a tragedy waiting to happen”. Critics of the DMK government have pointed a finger at the administration, claiming that the police failed to allocate a proper venue for the show. The police, in turn, have argued that TVK organisers had asked permission for a rally of 10,000 people, but that an estimated 25,000-27,000 people arrived at the venue. This is a poor excuse, given the turnout at Mr. Vijay’s previous roadshows and the unrestrained behaviour of his followers. But Mr. Vijay and the event organisers are equally to blame. They have still not grasped the complex logistics of crowd mobilisation and safety management.

Mr. Vijay, who harbours ambitions of becoming the Chief Minister of Tamil Nadu, reached the venue several hours behind schedule. By that time, the crowd was already bursting at the seams. Upon realising that the situation had got out of hand, the actor developed cold feet. Without checking what had happened to the people who had thronged there to see him, Mr. Vijay abruptly ended his speech and rushed to Chennai by a chartered flight. On reaching the capital ci-



ty, Mr. Vijay refused to speak to the media at the airport. He was expected to react, but he issued only a brief statement on social media, long after the tragedy had drawn national attention and prompted responses from the President, the Prime Minister, the Chief Minister, and other leaders. “I am languishing in pain and grief which cannot be expressed in words,” he posted. Though he announced ₹20 lakh each to the families of the dead, and ₹10 lakh for the injured, he missed the opportunity to show leadership in the face of adversity.

Tragedies do occur when crowds turn out in larger numbers than expected, and there have been quite a few instances of these across India. However, political parties in Tamil Nadu have mastered the art of organising mega events without causing casualties. The AIADMK, the DMK, and the Left parties all plan events meticulously. They often distribute water bottles and provide snacks and food packets in some cases. These measures prevent dehydration, which is likely to occur in a State where the sun is often extremely harsh.

Mr. Vijay, who is new to politics, has clearly failed to learn these lessons. Worse, the actor, who in many ways is responsible for the tragedy, fled the scene instead of staying in Tiruchi or a nearby town and visiting the victims.

The government too is accountable. It should not have permitted him to address a rally standing in the middle of a road, especially considering the density of vehicular traffic and his immense popularity as an actor. Such a mode of communication is a public nuisance in small towns such as Karur. Political rallies should be held outside city or town limits.

At the same time, it is also true that if the police or administration had denied permission for his roadshow, Mr. Vijay – whose primary target is the DMK government and who has been saying that the 2026 Assembly elections will be a contest primarily between his party and the DMK – would likely have made a major political issue of it.

The tragedy will now have a chilling effect on Mr. Vijay. He will have to think hard before planning his next move or rally. His followers too may weigh safety and other risks before participating in his outreach programmes. The government has the right to deny permission for his roadshows.

The event also once again exposes Tamil Nadu’s craze for film personalities. Despite tall claims of achieving growth and making strides in education and social justice, the State is unique in this regard. Anyone can enter politics; however, only in Tamil Nadu do all those who act in films arrogate to themselves the right to enter the field simply because they had essayed roles in which they were seen saving people and fighting tooth and nail for justice. And when that happens, ideologically inclined people and those dedicated to public causes simply look on. They are left with no choice but to throw their hands up in despair.

# More women join the labour force, but are they really employed?

In rural areas, it is difficult to separate women’s domestic responsibilities from their role as helpers in household enterprises

## DATA POINT

**Subhanil Chowdhury**  
**Anushree Gupta**

The female labour force participation rate (FLFPR) measures the share of women who are either employed or actively seeking work. A higher FLFPR is often seen as a sign of greater gender equality and a more dynamic labour market. The FLFPR fell from 31.2% in 2011-12 to 23.3% in 2017-18, before climbing to 41.7% in 2023-24 (**Chart 1**). While this rise appears encouraging, a closer look reveals that women continue to face barriers – both in terms of earnings and the kind of jobs available to them.

In India, workers are broadly classified into three categories: self-employed, regular salaried, and casual workers. The NSSO tracks earnings for each of these groups. Strikingly, during the very period when the FLFPR rose, real earnings declined for all categories except casual workers in both rural and urban areas. This points to a troubling reality – more women may be entering the workforce, but they are not finding secure or remunerative employment.

Chart 1 shows that the recent rise in FLFPR is largely driven by rural women. To understand this trend better, we now turn to a closer examination of female labour force participation and employment patterns in rural India.

Economic development is typically associated with a shift of the workforce from agriculture to non-agricultural sectors. Given the recent rise in rural FLFPR, one might expect more women to be moving out of agriculture into industry or services. The data, however, suggest the opposite. The share of rural women employed in agriculture rose from 71.1% in 2018-19 to 76.9% in 2023-24, while their presence in both the secondary and tertiary sectors declined (**Chart 2**).

A large share of women’s work takes the form of unpaid household labour, which does not count as employment in official statistics. Even within the employed category, there exists a group termed ‘helpers in household enterprises’ – a role that also falls under unpaid family work. So, two categories capture women attending to domestic duties, both of which are unpaid activities.

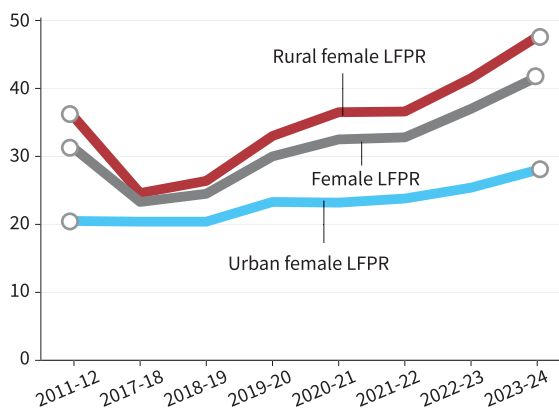
Among rural women aged 15 years and above, there has been a sharp fall in those reporting ‘domestic duties’ – from 57.8% in 2017-18 to 35.7% in 2023-24 (nearly 20 percentage points). This shift is mirrored by a 10.5 point rise in women counted as ‘helpers in household enterprises’ (from 9.1% to 19.6%) and a 10 point rise in ‘own account workers and employers’ (from 4.5% to 14.6%) over the same period (**Chart 3**). In other words, the reduction in unpaid domestic work has translated largely into self-employment, not into an expansion of wage employment.

In rural areas, it is often difficult – if not impossible – to separate women’s domestic responsibilities from their role as helpers in household enterprises. This blurring of boundaries may partly explain the rise in FLFPR. It also raises a fundamental question: should such unpaid helper roles be counted as employment at all? At the same time, even within the self-employed category, the apparent increase in own account workers and employers has coincided with a decline in their real earnings. In other words, the rise in self-employment has not improved women’s incomes (**Chart 4**).

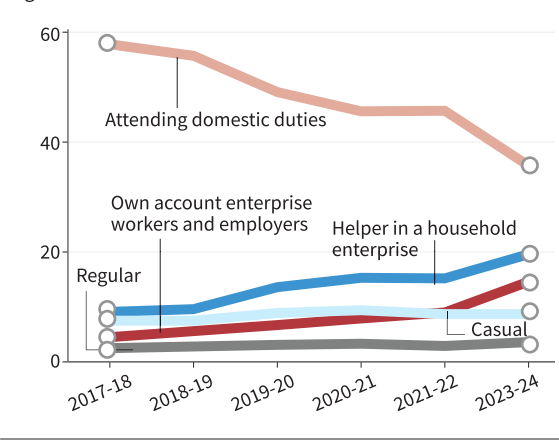
Thus, the rise in FLFPR is largely driven by an increase in women counted as helpers in household enterprises and as self-employed workers. Wage employment has not expanded, and real earnings for most categories of women workers have actually fallen. Far from signalling dynamism, this pattern points to deeper vulnerabilities in the labour market.



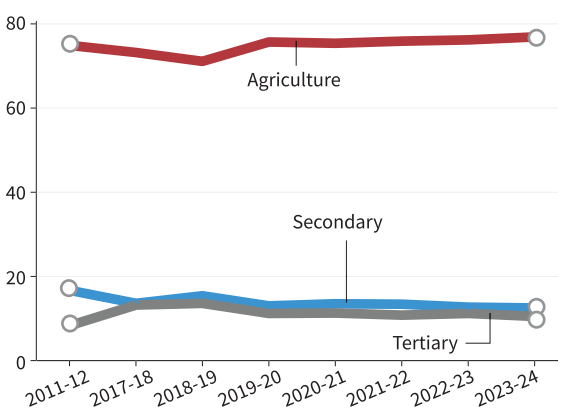
**Chart 1:** The female labour force participation rate (for women aged 15 years and above)



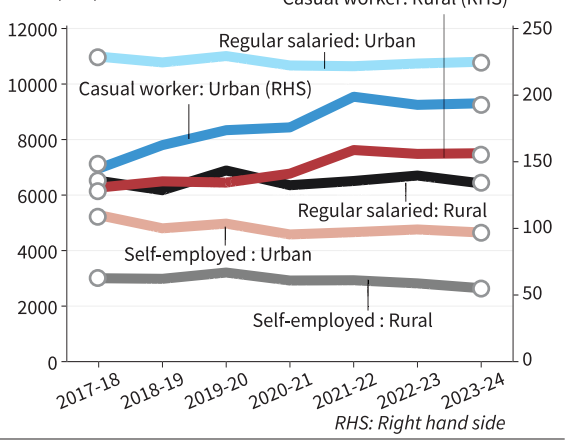
**Chart 3:** Paid and unpaid work of women in rural India. Figures in %



**Chart 2:** Sectoral distribution of women employment in rural India. Figures in %



**Chart 4:** Real wage and earnings of female workers in India (in ₹)



## FROM THE ARCHIVES

The **Hindu.**

FIFTY YEARS AGO OCTOBER 1, 1975

## Rodent control: ICAR plan to involve students

New Delhi, Sept. 30: A five-year national action plan for rodent control has been evolved by the Indian Council of Agricultural Research (ICAR).

The students and staff of universities, ICAR, voluntary organisations and Central and State Government Departments will be involved in the rat control plan.

According to the ICAR, there may be about 2,400 to 5,000 million rodents in the fields, in addition to 1,000 million rates (two rats per person) in the residential areas.

The All India Radio and the satellite television will arrange programmes to educate the public, while the students and volunteers will collect the dead bandicoots, skin them, treat the skins with chemicals and forward them to the Central Leather Research Institute in Madras for “by-product utilisation.”

The programme is aimed at control of the rat population but not its eradication, since that “may create possible ecological imbalances.”

The rat control operation will be carried out in the fields (before sowing of the crop), in threshing yards and in “essential places using poisons such as zinc sulphide and aluminium phosphide. About 1,100 kg of these poisons worth Rs. 45,800 will be required for each community development block.”

The section plan is expected to commence in January, 1976.

The ICAR national programme, which also envisages pest management, weed control and planting, involves the control of “white grubs”, a pest that causes 40 to 80 per cent loss to crops in Maharashtra, Gujarat, Karnataka, Rajasthan, Tamil Nadu and Orissa.

The Weed Control Plan, like that for rodent control, will be taken up on a “massive national scale”.

A HUNDRED YEARS AGO OCTOBER 1, 1925

## Belgian king and queen

Delhi, Sept. 30: Their Majesties, the King and Queen of the Belgians, arrived here at half past six, this evening and were received at the Delhi Main Railway Station by Mr. Abbott, Chief Commissioner, Major-General Isaacs and prominent officials. Their Majesties drove to the Vice-regal Lodge. The arrival was private.



# Text & Context

THE HINDU

NEWS IN NUMBERS

Share of Maharashtra farmlands damaged after the floods

**40** In per cent. Officials say torrential rains have severely affected crops across Marathwada, Solapur, Satara and Sangli, leaving large areas inaccessible. A survey of the destruction is expected by October 5. Relief measures will be finalised after report is reviewed by the Chief Minister. PTI

Number of people killed in road accidents across India

**1.73** In lakh. The latest National Crime Records Bureau (NCRB) report shows a slight rise in fatalities and injuries, with two-wheelers accounting for nearly half of deaths. Over-speeding and careless driving are the leading causes, and evening hours see the most accidents. PTI

Number of voters added in Patna ahead of the elections

**1.63** In lakh. The Election Commission completed its Special Intensive Revision, updating voter lists across the State. In Patna district alone, this led to a significant increase in registered electors. The draft electoral roll listed 7.24 crore voters. PTI

Number of crimes which targeted senior citizens

**27,886** Simple hurt, theft, and fraud were the most common crimes. Madhya Pradesh reported 5,738 cases, followed by Maharashtra with 5,115, and Tamil Nadu with 2,104. Among Union Territories, Delhi recorded the highest number of cases. PTI

Voters in the Jubilee Hills constituency of Telangana

**3.99** In lakh. The constituency's electoral roll now includes nearly four lakh voters, with male, female, and transgender electors accounted for. A total of 407 polling stations have been set up. PTI

COMPILED BY THE HINDU DATA TEAM

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## Why are Indian broadcasters owed payments?

Do Indian entertainment channels air in Nepal and Bangladesh? How much money is due to Indian broadcasters from these countries? How has the fall of the Sheikh Hasina government affected payments? Have Nepalese TV distributors pirated off Indian feeds?

EXPLAINER

Aroon Deep

The story so far:

Indian broadcasters have complained of mounting dues from distributors in Nepal and Bangladesh, *The Hindu* reported in August. Over ₹350 crore in dues from the two countries remain unpaid since 2023.

Do Indian channels air in Nepal and Bangladesh?

Indian entertainment channels, particularly in Hindi and Bengali, are widely popular in Nepal and Bangladesh. A list of available channels in Nepal Telecom's list shows options from Zee, Star, Sony and Viacom, and similar options are available on Bangladeshi TV distributors' networks. Like in India, some of the Indian channels are available with basic packs, and others are available with add-ons. Nepal and Bangladesh receive a separate feed of Indian channels, known as a "clean feed". This is because ads on channels in India may be for products or variants of products that are unavailable in those countries. Channels typically spend extra to create this separate feed, and uplink it to satellites or cable providers licensed to operate in Nepal and Bangladesh (India has similar uplinking and downlinking regulations). As these are international deals, Indian broadcasters typically charge dollars from foreign countries where their feeds are played.

Nepal and Bangladesh, like India, have extensive broadcast regulations, particularly targeting foreign broadcasters. Bangladesh, for instance, requires foreign broadcasters to use satellites that are controlled by local firms, an expensive prospect. Similarly, Nepal abruptly introduced its à-la-carte channel bundling rules for cable operators practically overnight in 2023, with rules that matched India's New Tariff Order, but with none of the notice,



ISTOCKPHOTO

sending foreign broadcasters into a tailspin to comply.

Why are Nepal and Bangladesh firms not paying Indian broadcasters?

Payment issues are not uncommon for Indian firms operating in these countries. In Bangladesh, for instance, Adani Power was not paid for months on end after the ouster of former president Sheikh Hasina. Nepalese telcos faced a payments crisis with Airtel, whose terrestrial cables provide a large portion of the country with Internet, in 2023.

In Bangladesh's case, the economic fallout of Ms. Hasina's ouster has led to the country prioritising key areas for clearing dues and investing limited funds, one broadcasting executive told *The Hindu*. Media and entertainment, as it

turns out, has not been a key priority area, with the country choosing to focus funds it received – including from a recent World Bank loan – in medicine and electricity dues, among other things.

Both countries, however, have an added complication – their respective governments have to approve the issue of foreign exchange that companies need to make good on these deals. As such, even when a distributor is good for the money, stonewalling from the ministry or central bank has led to payments stopping, another executive told *The Hindu*.

As a result of these factors, both countries' distributors owe above ₹350 crore to Indian firms. Nepal owes ₹100 crore while the rest of the amount is due from Bangladesh. While a prime ministerial visit to India by Nepal was

due, Nepal Prime Minister K.P. Sharma Oli resigned in the wake of mass protests in September, increasing uncertainty for all businesses as the interim government works toward a fresh election.

Can broadcasters cut off their feeds?

Unlike Adani Power and Airtel, broadcasters don't have much leverage over defaulters in foreign countries. Airtel provides Nepal with Internet access, which the landlocked country cannot obtain from an undersea cable. Adani Power's electricity transmission lines literally keep the lights on. Both of these firms can throw these countries into chaos if they cut off access.

Broadcast executives worry, however, that if they cut off their clean feeds, Nepalese and Bangladeshi TV distributors would simply buy an Indian satellite TV receiver, and pirate the feed from there. This has happened before, and entering these markets legitimately with a fee was already a huge challenge. Doing so all over again would be a tall order, they complain. Nepalese cable operators have openly flouted Indian broadcasters' intellectual property rights by simply covering up a pirated feed's logo and replacing it with their own, one broadcaster complained.

Same in Pakistan and Afghanistan, where Indian broadcasters have not been operating for years.

International agreements like this typically have an arbitration clause, but broadcasters have little confidence in the legal systems of the two countries to be able to enforce such arbitral orders.

Executives have also complained of Indian diplomatic missions' limited influence in urging foreign governments to clear these dues. India maintains an extensive diplomatic presence in both Dhaka and Kathmandu, with economic and cultural attachés, one executive said, but companies often find themselves fending for themselves, or if they have a foreign shareholder, trying their luck by making representations to diplomats of that country.

THE GIST

Indian entertainment channels, particularly in Hindi and Bengali, are widely popular in Nepal and Bangladesh.

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## Why is environmental surveillance important?

How can sampling wastewater help in predicting and monitoring disease outbreaks?

Gautam Menon

The story so far:

Pathogens (usually bacteria and viruses) that cause diseases in humans and animals, can be tracked in samples taken from the environment, for example, by sampling sewage through wastewater surveillance. This can provide early warnings for potential disease outbreaks.

How does this work?

Samples taken from sewage treatment plants, effluents from hospitals and from public spaces such as railway stations and toilets in airplanes, can be studied to see how the pathogens they contain change from day-to-day. It works because pathogens of interest are shed in the stools or urine of infected individuals. Diseases transmitted by parasitic worms such as roundworms and hookworms can also be monitored through wastewater

and soil samples, providing information about the burden of the disease and the effectiveness of control measures.

Rigorous protocols inform the collection of samples. These protocols detail how samples must be collected and processed, and how pathogens are detected and analysed. By following these protocols, comparisons of pathogen load become possible, and whole-genome sequencing enables the identification of variants of the same pathogen.

Why is this important?

Traditionally, the only way to figure out levels of infection in a community was to detect infections in patients, called clinical case detection. However, not all infected people might show symptoms, or might not choose to be tested if symptoms are mild. The number of people who are tested might not reflect the true numbers of those infected. Environmental surveillance can thus

provide important early warning signals of an impending outbreak. It is now known that the levels of pathogen in wastewater can precede, often by more than a week, a rise in infections.

Why do early-warning signals matter?

Understanding how many infected people there are is important for public health planning. The more the amounts of pathogen that circulate, the more likely it is that people will be infected. Preparing for a disease outbreak becomes much easier if there's more notice.

Wastewater-based epidemiology has been used for over 40 years to track several diseases such as measles, cholera and polio. Such disease surveillance in India, through wastewater, was first initiated in Mumbai for polio in 2001. During the COVID-19 pandemic, similar surveillance programs for COVID-19 were started in five cities, and they continue to this day.

What is India doing?

The Indian Council of Medical Research (ICMR) has recently said that it will initiate wastewater surveillance for 10 viruses across 50 cities. This will enable public health surveillance to pick up any increase in viral load within community settings. This extends ICMR's involvement in establishing environmental surveillance for viruses, including avian influenza virus, particularly in areas with outbreaks. However, there is scope for improvement. The sharing of data and protocols across institutions and reaching common agreements on templates for surveillance frameworks that are disease-specific is important. Programmatic approaches, rather than project-driven approaches, must be developed that integrate waste-water and other environmental surveillance with routine disease surveillance. Developing a national wastewater surveillance system for India is important.

Moreover, new methodologies are emerging – audio samples of people coughing in public places can be used to examine the prevalence of respiratory conditions, through refined machine learning methods. Thus, the possibilities of environmental surveillance are ever-increasing.

*Gautam Menon is Dean, Research and Professor of Physics and Biology, Ashoka University. Views expressed are personal and not of his institution.*

THE GIST

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# Polar geoengineering could cause severe harm: scientists

Lowering carbon emissions can delay, if not avert catastrophic climate change, improve air quality, and minimise pollution; in fact, every tonne of emissions avoided today will translate to fewer shocks tomorrow, buying earth the sort of stability some currently seek through geoengineering

Priyali Prakash

Geoengineering is a hotly contested topic among both scientists and policymakers. While some call it an innovative solution that could buy a warming world some time, others believe it's a reckless cop-out that could further environmental exploitation. A new study, led by University of Exeter geoscience professor Martin Siegert, has now tipped the balance in favour of its opponents by reporting that five prominent geoengineering concepts, proposed for the earth's polar regions, fail to meet essential criteria for responsible climate interventions.

The researchers also added that these methods could render severe environmental damage with far-reaching global consequences.

Their findings were published in *Frontiers in Science* on September 9. The five methods in question are:

1. Stratospheric aerosol injection (SAI): deliberately releasing aerosols into the earth's atmosphere to reflect sunlight and cool the earth's surface
2. Sea curtains/sea walls: blocking warm ocean water from reaching the ice sheets in polar regions using large buoyant structures attached to the seabed
3. Sea ice management: scattering glass microbeads over sea ice to boost their reflectivity and artificially thicken them
4. Basal water removal: reducing ice loss by removing subglacial water from under glaciers to slow the movement of ice sheets and decelerate sea level rise
5. Ocean fertilisation: drawing more CO<sub>2</sub>, from the atmosphere into the ocean by adding nutrients like iron to polar oceans to stimulate phytoplankton growth.

**Where SAI stumbles**

Currently, research on SAI is focused on four aerosol species: sulphur dioxide, sulphur aerosols, titanium dioxide, and calcium carbonate.

Scientists however, have raised concerns that injecting these aerosols into the upper atmosphere will create more problems than it promises to solve. In polar winters, there's no sunlight to reflect, rendering the injection useless for half the year. Even during summers, the ice and snow masses in polar regions already reflect most of the sunlight naturally, so adding more reflective particles couldn't help much.

SAI also comes with the threat of termination shocks. Research has found that if a geoengineering project is stopped suddenly, global temperatures could skyrocket in only 10-20 years as the greenhouse effect that the aerosols' consequences were masking will return. Taken together, an SAI project, once implemented, will have to run continuously for a long time. There is also no international instrument at present that guarantees to pay for such an undertaking or determines who will bear responsibility if it backfires.

Using SAI to 'only' cool polar regions can also disrupt seasons worldwide because weather and climate phenomena are influenced by far-flung effects, with potentially drastic implications on nutritional and national security.

Finally, of course, SAI is not cheap. The new study estimated that if 30 countries were to split the cost, they'd each have to cough up \$55 million a year – in addition to dealing with legal issues.

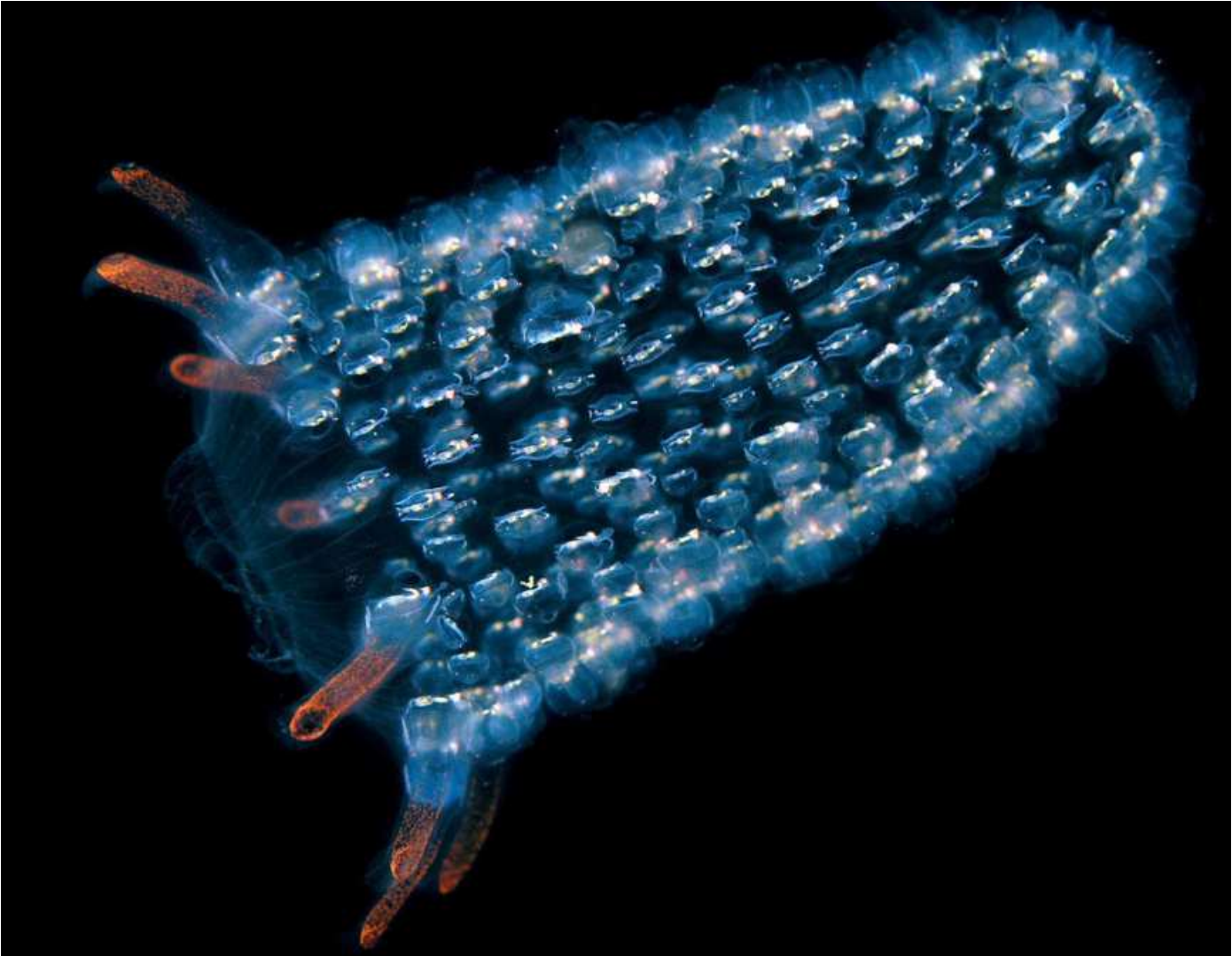
**On shaky legs**

Similarly, plans to build large underwater 'curtains' pose considerable technical and environmental hurdles. Installing the heavy foundations is a difficult job even on land, let alone in seafloor sediments and rugged bedrock hundreds of metres below the surface. Such engineering activity may also slow melting in some areas, according to some models.

Another major obstacle to the proposal to add sea curtains is the logistics. The Amundsen Sea in Western Antarctica is one of the most remote and hostile places on the earth's surface and is accessible for only a few months each year. Few ships can even attempt such work; building the vessels of the requisite class would cost around half a billion dollars each as well.

Similar proposals for Greenland may be somewhat more feasible, but their overall consequences on sea level rise remain uncertain.

This geoengineering method has also been associated with extreme potential marine environmental consequences, including negative effects on oceanic circulation and sea ice levels. Barriers in the water will also stand in the way of marine life like fish and marine mammals,



A free-floating pyrosome made up of hundreds of individual bioluminescent tunicates, a form of zooplankton, off East Timor, 2005. NICK HOBGOOD (CC BY-SA)

which feed at depth in these regions, the researchers said.

At present, it's also not clear which materials can be used for this purpose. They will have to be selected such that their wear and tear over time doesn't release toxic compounds into the water, polluting it and further disrupting natural nutrient cycles that are already fragile.

Based on previous research, the new study estimated that this method could cost a lot more than \$1 billion (₹8,783 crore) per kilometre.

**Inefficient interventions**

The principal challenge with managing sea-ice levels is ecotoxicity. While some tests and modelling exercises are currently underway, there's no real clarity on how it will affect invertebrate organisms, especially zooplankton. The glass microbeads may also dissolve quickly in seawater, limiting their usefulness. To have any impact, in fact, the study has estimated that 360 million tonnes of beads will be required every year – roughly equal to the world's annual production of plastics, thus creating tremendous logistical, supply chain, and emissions challenges.

Worse yet, some studies have also found that the microbeads could absorb sunlight and have a net warming effect on Arctic Sea ice. The new study also concluded that managing sea ice in this way could prove economically unviable compared to mitigating the emissions of greenhouse gases and adopting efficient adaptation strategies.

The aim of Arctic sea-ice freezing is to thicken the ice by pumping seawater either onto the ice surface, where it will freeze, or into the air so that it precipitates as snow and is deposited on the surface of extant ice.

According to experts, this method is neither practical nor effective. Research has estimated that up to 100 million pumps will be needed to cover the Arctic, which will draw a million units of electricity every year for a decade, representing a counterproductive draw

**Research has found that if a geoengineering project is stopped suddenly, global temperatures could skyrocket in only 10-20 years as the greenhouse effect that the aerosols' consequences were masking will return**

on international energy production and finance. The pumps will also have to be pinned in place to keep them from drifting and will need to be maintained at regular intervals, increasing the local carbon footprint. Even if such a massive effort were possible, researchers have cautioned that it will only preserve late-summer sea ice for a few decades and will have little overall impact on slowing global warming.

The method is also expected to incur production and transportation costs of \$500 billion a year for the whole Arctic – an infeasible investment for a project that's barely expected to work.

**Scaling issues**

Subglacial water in Antarctica is mostly generated by frictional and geothermal heating. However, according to research, drawing this water away with the aim of slowing the rate at which glaciers slide into the oceans is flawed, not to mention a highly emissions-intensive exercise that will demand continuous monitoring and maintenance.

Finally, while adding iron filings to stimulate the growth of phytoplankton in the ocean could work, there's no way to control which species will dominate. This creates critical uncertainties in local food chains and food web dynamics. For example, if the filings enhance biological productivity in artificially fertilised regions, organisms there might be driven to consume more and more nutrients that might otherwise have circulated to lower latitudes.

The authors of the new study also said that this isn't a viable strategy because of

the scale it will need to be deployed at.

**Beyond geoengineering**

Per the new study, protecting and even reversing the damage caused by global warming will need "climate-resilient development," which in turn requires changes in the relationship between humans and the planet. The most common components of this are decarbonisation and better maintenance of protected areas.

However, protected areas – which have long been touted as bulwarks against ecological decline – have attracted criticism for their fortress-like model of conservation. By displacing local communities, these areas can cut off centuries-old relationships between people and ecosystems and undermine traditional knowledge and livelihoods. Experts have also found that militarised enforcement in such areas could foster rather than discourage human-wildlife conflicts, breeding resentment in the local (human) population.

Protected zones can also strain local governments by diverting resources from broader environmental reforms, while sealing off habitats could overlook ecological processes that cross artificial boundaries, potentially reducing ecosystem resilience.

Global efforts to decarbonise also face a host of intertwined challenges. Foremost among them is the continued reliance on fossil fuels, which still account for over 80% of global energy use despite decades of policy commitments.

Transitioning away from coal, oil, and natural gas also demands large upfront investments in renewable infrastructure, grid modernisation, and storage capacity – costs that many developing economies can't easily shoulder.

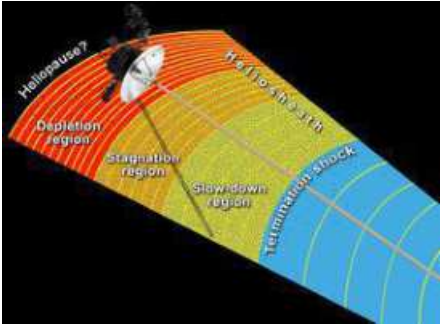
And even where funds exist, political resistance has loomed large, especially in the form of entrenched fossil-fuel lobbies and voter anxieties over rising energy prices. Scaling up renewable energy production, storage, and uptake also needs to surmount supply chain bottlenecks for critical minerals like lithium, cobalt, and rare earths. In addition, the global energy divide persists: while industrialised countries seek to cut emissions, many poorer nations have argued that their developmental needs have yet to be met, creating diplomatic rifts at climate negotiations.

Even so, lowering carbon emissions remains the most promising way to avert catastrophic climate change. Unlike geoengineering or delayed adaptation strategies, decarbonisation can directly address the root cause by curbing the accumulation of greenhouse gas in the atmosphere. Lowering emissions can also improve air quality and minimise environmental pollution. In fact, every tonne of emissions avoided today will translate to fewer shocks tomorrow, buying humankind the sort of stability that some are currently looking for with geoengineering.

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Some studies have also found that microbeads could absorb sunlight and have a net warming effect on Arctic Sea ice. ARNAUD MARIAT



An infographic featuring the outer regions of the heliosphere based on data from the Voyager spacecraft. NASA/JPL

## NASA's IMAP will show how solar particles are energised and shield us

The Hindu Bureau

Space isn't empty. The sun issues a continuous stream of charged particles called the solar wind, which creates a vast region around our solar system called the heliosphere. This region acts like a protective bubble that shields the planets from cosmic rays and interstellar particles. Yet the structure, dynamics, and boundary of the heliosphere are still poorly understood. Scientists want to know how particles are accelerated in the solar wind and how they interact with the space between stars. Changes in the solar wind and its particles also affect space weather, which can damage satellites, harm astronauts, and disrupt communication systems on earth.

To address these questions, NASA launched the Interstellar Mapping and Acceleration Probe (IMAP) on September 24. Its goal is to map the heliosphere's boundary, trace energetic particles, and improve space weather forecasting.

IMAP is equipped with 10 scientific instruments, each designed to detect different types of particles or phenomena in space. Some of them are energetic neutral-atom detectors (IMAP-Lo, IMAP-Hi, IMAP-Ultra), which capture neutral atoms that were once charged ions but were changed by acquiring electrons. Other instruments detect charged particles directly, magnetic fields, interstellar dust, and solar-wind structures.

After launch, IMAP will travel to the sun-earth Lagrange point 1 (L1), about 1.6 million km from the earth toward the sun, where gravitational forces balance in a way that allows the spacecraft to remain in a stable orbit with minimal fuel use. Once there, IMAP will continuously observe incoming solar wind and energetic particles from a fixed vantage point. IMAP will also send data in near real-time to help scientists monitor space weather conditions.

**IMAP, which was launched on September 24, will map the heliosphere's boundary, trace energetic particles, and improve space weather forecasting**

Based on mission design and early operations, scientists expect IMAP will produce the most detailed maps yet of the heliosphere's boundary, revealing how the solar wind collides with the interstellar medium. It will also trace how particles accelerate from the sun, move out, or are energised in the heliosphere. In more specialised research, IMAP-Lo is expected to be able to observe interstellar neutral hydrogen and deuterium, possibly distinguishing primary versus secondary populations of these atoms at the heliopause, which is the outermost layer of the heliosphere.

IMAP data are expected to have profound implications. By revealing the structure and dynamics of the heliosphere, physicists can deepen their understanding of how our solar system is protected against cosmic radiation. That is relevant to understanding the earth's habitability and that of exoplanets as well. Second, better data on solar wind behaviour will strengthen physicists' ability to forecast space weather, in turn helping protect satellites, communications networks, power grids, and orbital crews.

For future human exploration beyond the earth, IMAP's measurements of how particles travel and are accelerated will help plan safer routes and design better shielding for spacecraft.

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



Just not cricket

India should not have played in Asia Cup

The wry saying that ‘sport is war by other means’ sadly came true in the recently concluded Asia Cup, where India beat Pakistan thrice in an equal number of encounters in the course of the last month. But what was on display in Dubai was not cricket at all, as cricketers consciously deserted basic sporting protocols in a way that has seldom been seen in India-Pakistan sport encounters — even when bilateral ties were as just as bad as they are today.

Pakistan’s actions over the years have contributed to this sad state of affairs — with its relentless acts of terror on Indian soil, from Kargil to 26/11 to Pulwama to Pahalgam. But despite this unsavoury backdrop, some red lines were crossed this time in Dubai. Sport, which is about the game transcending all else even if for a brief duration, had ceased to be. If the Pakistani cricket team did not cover itself with glory with its cricket or its ugly dramatics, the Indian side was no less except that it excelled on the field. Apart from the needless gesticulations in the field involving guns and aircraft, the award ceremony was truly farcical. India rightly refused to accept the trophy from Asian Cricket Council chief Mohsin Naqvi, who is also Pakistan’s interior minister, who in turn, churlishly decided not to allow anyone else to do the honours. Indian captain Suryakumar Yadav may have been right in a political sense in refusing to shake hands with the opposition or engaging with Naqvi. But he violated the protocol of the game — and consciously so, as he said that there are matters larger than sport.

If the government felt that Pakistan should not be engaged with on the cricket field — and there are justifiable reasons for that after the April massacre of 26 innocent civilians in Pahalgam by terrorists sponsored by Pakistan — it should have directed the Board of Control for Cricket in India not to send its team to the tournament. It is a cynical but fair surmise to make that the BCCI, while deciding to participate in the tournament, was blinded by the big bucks to be made out of an India-Pakistan match. The Indian players’ unusual aggression was perhaps directed to compensate for the decision to play Pakistan so soon after Pahalgam. Significantly, Prime Minister Narendra Modi tweeted comparing the victory on the field with Operation Sindoor.

The temptation of mixing sport and politics must be desisted. There is the real prospect of riots breaking out, and this has happened before. Emotions and tempers run high in India-Pakistan sport encounters, which is why it is generally a good idea these days to have them in neutral venues, even if ties return to a more normal keel. Meanwhile, it may be a better idea for India to avoid playing Pakistan in future than taking politics into the cricket field. Victory or defeat, there is no sadder spectacle than sportspersons being palpably reduced to pawns on a political chessboard.

POCKET



Options before RBI vis-a-vis Fed

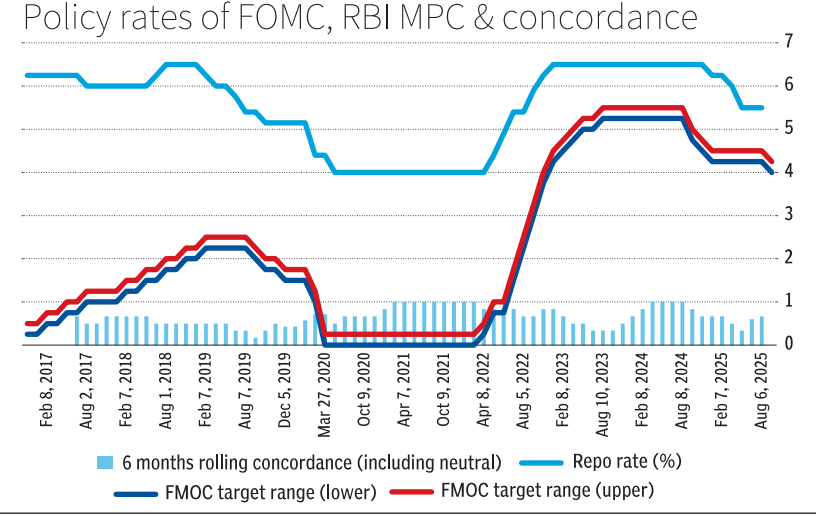
POLICY MOVE. In the current context, focus on sectoral policies rather than a rate cut would be more effective



Does Reserve Bank of India ‘follow the Fed’? On September 16-17, the Federal Open Market Committee (FOMC) announced the much anticipated 25 basis point interest rate cut, keeping room open for further cuts in this year. Even though the Fed Chair Powell has categorised this more as a ‘risk management cut’, the Fed decision has led to anticipation of a rate cut for India. As RBI Monetary Policy Committee (MPC) meets on September 29, the Indian market is speculating a dovish stance for the present policy, and a rate cut further in December 2025. Two questions are important in this context: Do we ‘follow the Fed’? Or need to do it? Should RBI deliver any more rate cuts this time or further this year?

First, does RBI indeed follow the FOMC decisions? While RBI maintained that the central bank plays the ‘game according to local weather and pitch conditions’ (former RBI Governor, Das, April 7, 2024), it is indeed difficult to imagine that the Fed’s actions do not impact the MPC decisions. The game does need to change according to the global headwinds and the peers playing: in a world of interconnected global conditions, not considering the Fed and peer group central banks’ stance would not be appropriate. In today’s interconnected world, a decoupled policy move is hardly a possibility.

**COMPARATIVE PICTURE**  
We present here a comparative picture of RBI’s actions following FOMC interest rate actions. For each RBI MPC meeting, the immediate prior FOMC meeting and RBI’s decisions are taken. The Chart plots the RBI repo rate for the meeting and the prior meeting FOMC target range lower and upper bounds. We can see the strong co-movement, as has been a characteristic of monetary policy decisions globally. To understand the linkage better, we calculate a concordance index, in line with the measures of pro-cyclicality cyclicalities (Harding & Pagan, 2002). This index measures how closely monetary policy



actions by the RBI (repo rate changes) and the US Federal Reserve (Fed Funds rate changes) are aligned in terms of direction of interest rate changes.

We use the rolling concordance, which smooths this measure over a six-month window to show how consistent the policy alignment has been recently, instead of looking only at one point in time. The Chart plots the 6-month rolling concordance index. A value of 1 implies the central banks are

**The decision to cut rates now or later, must be driven by evaluating whether the impact reaches the end-users of credit and boosts employment, investment and consumption**

aligned (concordant), while 0 means they differ. The plot of concordance index depicts a close synchronicity between the Fed and RBI interest rate decision cycles. We can also see that post Covid pandemic, there has been a greater synchronicity.

Dividing the periods, by hawkish and dovish policy decisions, we see an interesting facet. Hawkish decisions have a higher synchronicity compared to dovish ones.

In fact, in the post-Covid period, 50 per cent of rate hike decisions of FOMC were followed by the RBI, compared to 33 per cent of down-cycle rate cuts. It is an established fact that post Covid monetary expansion was globally synchronised.

Also, the response to higher inflation during 2021-22 was again well-synchronised. The frequency of following rate hikes stands much higher

than that of following rate cuts. This is not surprising: if a rate hike by FOMC is not followed by the RBI, a squeeze of interest rate differential will lead to capital outflows, and depreciating pressure on the currency, which the central bank has been careful to avoid. It looks like the FOMC decisions of rate cut puts lesser pressure on the MPC than a rate hike would have.

However, should the RBI lower rates this time? *RBI Bulletin*, September 2025, highlights both the subdued inflation and growth momentum, iterating Indian economy’s marked resilience ‘negating the decline in net exports’, driven by domestic ‘consumption expenditure’ and ‘strong fixed investment activity’. However, in the absence of any clear indication of a pass-through of rate cuts to higher credit demand, or growth, a focus on sectoral policies rather than a rate cut would be more effective.

The FOMC has clearly mentioned that the rate cut this time is a ‘risk management cut’ keeping in view the unfavourable labour market conditions. In this scenario, sector specific credit boosts would be more appropriate. Sector-specific cuts have been used by central banks world over, including the RBI: from ECB’s Targeted Longer-Term Refinancing Operations (TLTROs), Bank of England’s Funding for Lending Scheme to Reserve Bank of India’s TLTROs for specific sectors, and sectoral liquidity facilities channelled via NABARD, SIDBI, and NHB to MSMEs, housing, and agriculture (RBI’s *Report on Currency and Finance*, 2020-21, p. 131).

For alleviating the impact of the tariffs on exporters, and therefore domestic employment and consumption from these sectors, extension of credit cycles with refinance option to banks could be considered. India’s export credit framework, though under priority sector lending, would benefit from a structured central bank-linked refinance line associated to priority export sectors (textiles, electronics, renewable equipment), with FX-denominated refinance to ease raw material imports. The decision to cut rates now or later, must be driven by evaluating whether the impact reaches the end-users of credit and boosts employment, investment and consumption.

Trivedi is Associate Professor, National Institute of Bank Management, and Das is IICI Bank Chair Professor, IIM Ahmedabad. Views are personal

Global container shipping lines making waves

They have been diversifying into port development, and establishing container freight stations and logistics operations

Jose Paul

April 26, 1956, is widely regarded as a key date in the history of container shipping when standardised containers were first used to transport cargo by sea. The converted tanker ‘Ideal X’, which sailed from New York to Houston in the US carrying 58 containers on its decks, was the brainchild of trucking magnate, Malcom Mclean who calculated that loading a medium-sized ship in the conventional way will cost \$5.83 a tonne compared with less than \$0.16 a tonne when carried in containers.

Containerisation thus opened up new markets and gradually connected just about every corner of the world to the global economy.

**GROWTH AND DEVELOPMENT**  
Today, it is not American but European lines which are dominating container shipping. About 30 container shipping lines operate to different ports of the globe. The largest container shipping lines are Switzerland’s Mediterranean Shipping Company (MSC), Denmark’s Maersk Line, France’s CMA/CGM, Hong Kong’s Chinese Container Line COSCO, Germany’s Hapag-Lloyd and Japanese owned Ocean Network Express (ONE). As of early 2025 MSC has

approximately 900 container ships of 5.5 million TEUs controlling about 20 per cent of global container capacity. Maersk Line has about 700 container ships of 4.1 million TEUs while the CMA/CGM has 650 vessels of 5.42 million TEUs including about 122 ships under construction.

Thus CMA/CGM has effectively overtaken Maersk as the second largest container shipping line. The fourth largest, COSCO Shipping, has 542 vessels of 3.39 million TEUs. The fifth largest is Hapag-Lloyd, with 248 ships of 3 million TEUs. ONE is the sixth largest of 2 million TEUs. The top 30 container shipping lines control about 80 per cent of the total container fleet.

The world fleet of container ships by 2025-end is expected to reach about 6,700 vessels of 32.5 million TEUs. The global fleet capacity growth has exceeded trade volume growth for several years. In container shipping specifically, growth in supply has consistently surpassed growth in demand for a large part of the past three decades.

For decades, containerised trade has been the fastest growing market segment accounting for less than 20 per cent of global seaborne trade, but two-thirds of global trade by value is earned in container shipping. A recent study provides empirical evidence that



CONTAINER CARRIERS. Raking in huge profits

containerisation is the driver of economic globalisation in the 20th century.

A new trend that is unfolding globally is the continued penetration of containerisation into bulk trade.

Container carriers achieved unprecedented profits, estimated at almost \$300 billion in earnings before interest and taxes (EBIT) in 2022 (UNCTAD Review of Maritime Transport 2023). The high container freight rates appear to have yielded huge profits to container shipping lines.

Top container shipping lines are now aiming at strengthening their position and mitigating the effect of downturns in business cycles by creating additional revenue streams and investing in new assets and broader logistics.

These shipping lines have been investing in end-to-end solutions to emerge as service integrators.

They have been diversifying their portfolio from container shipping into more profitable sectors like port development, establishment of container freight stations and logistic operations.

**INDIAN CONNECTION**  
For example, MSC holds a stake in Adani Ports (in Mundra), Kamarajar and Vizhinjam for more efficient container operations. Maersk signed a significant investment agreement with the Government of Andhra Pradesh in August to develop Krishnapatnam Port. The CMA/CGM has strategic terminal investments in JN Port and in Gujarat’s Gift City.

ONE has launched a new intermodal refrigerated rail services connecting Hyderabad ICD with Nava Seva. This service is aimed at improving cold chain logistics between inland India and global markets.

Maritime States in India should invite major container shipping lines to make investments and, thereby, promote port-led growth.

The writer is a former Chairman of Mormugao Port Trust and an Adjunct Professor of Indian Maritime University, Chennai

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

**Ensure rate transmission**  
This refers to ‘MPC should opt for a pause in upcoming policy’ (September 30). Rather than looking for another rate cut, ensuring transmission of the previous rate cuts is paramount. A mere cut in the policy rate alone will not be sufficient for credit growth, investment opportunities and credit absorption capacity are also vital factors. Excessive credit supply in the economy will not only be counter-productive but will also lead to financial instability and a surge in bad assets. The inflation rate is under control due to the GST rate cuts and, therefore, there’s no need to enhance the policy rate. The growth momentum of the economy, however, is under threat on account

of the high tariffs being enforced by the US administration. The restrictions created by the US are affecting our exports. The rate-setting committee must maintain status quo on repo rate, besides continuing an accommodative stance to instil confidence in the market to support the growth momentum.  
**VSK Pillai**  
Changanacherry, Kerala  
**Technical glitches**  
Appropos ‘Trading snags’ (September 30), SEBI’s move to regulate technical glitches in broking platforms is welcome, but exempting smaller brokers risks weakening investor protection. Even a so-called “small” broker today handles substantial investor wealth, and any

outrage — whether due to hardware, software, or connectivity — can quickly erode trust. Investor safeguards should not vary with broker size. A more practical way forward is a tiered system: lighter rules for smaller brokers, but compulsory disclosure of all disruptions. This balances operational realities with investor confidence, while gradually nudging all intermediaries towards stronger systems. Transparency, above all, is vital to preserve market credibility and reassure India’s rapidly growing retail investors.  
**Avinashiappan Myilsami**  
Coimbatore  
**Curbs on movie-making**  
This refers to ‘Trump says US to impose 100% tariff on movies made

outside the country, details under wraps’ (September 30). Hollywood is on a decline as only 20 per cent of American films and TV shows are made there now. The soaring cost of production has resulted in shoots being shifted to countries like Canada, New Zealand and the UK. Trump’s move will surely counter these countries’ moves but in turn US distributors’ cost would significantly increase. Moreover, Trump should not forget that movies are for entertainment, a movie can be shot in various countries depending upon its script, so he cannot make it localised versus imported. Taking his protectionist trade policies to the entertainment industry is stretching things too far.  
**Bal Govind**  
Noida

**IT in plantation sector**  
This refers to ‘Planters must embrace IT for sustainability’ (September 30). Tech being an essential across sectors, its adaptability in plantation as well as in the agri sector is vital. Since the plantation sector is facing challenges in various fronts like erratic climate, soil degradation, pest infestation and high input costs to name a few, focus must now be on offering solutions to basic issues, including mechanisation, without which encompassing technology may not offer the desired results. Essentially, plantation farmers must be offered tech advantage without financial burden, to make them accept the change.  
**Rajiv Magal**  
Halekere Village, Karnataka



# Kolkata flood lessons

Urban areas need infrastructure, design facelift

Arya Roy Bardhan

A single night of extreme rain brought Kolkata to a standstill recently. The city was swamped by 251 mm of rainfall, the heaviest downpour since 1986. Streets turned into rivers, halting traffic, submerging buses, and forcing businesses and schools to close. Public transport was crippled — sections of the metro were shut, trains were suspended, and dozens of flights were cancelled or delayed.

Indian cities are increasingly flood-prone due to a confluence of factors: extreme rainfall events, unplanned urban growth, and inadequate infrastructure. Climate change is amplifying rainfall variability — cities now receive months’ quantum of rain in a day with alarming regularity. In Kolkata’s case, 20 per cent of its annual rainfall fell within seven hours, overwhelming drains. Such cloudbursts are becoming frequent.

## RAPID ENCROACHMENT

At the same time, rapid urbanisation has encroached on natural drainage. In India’s largest cities, 39 per cent of new development since 2000 occurred on low-lying floodplains and wetlands. Kolkata and others have paved over canals, filled lakes, and built on marshlands that once served as sponges. When wetlands are lost and open soil is replaced with concrete, rain has nowhere to go.

A one per cent increase in paved surface can boost flood peaks by 3.3 per cent. Thus, in cities that doubled their built-up area, even moderate rain now causes waterlogging.

Urban planning has not kept pace with these realities. Drainage networks are outdated and under-capacity, often based on 20th-century rainfall patterns. Solid waste clogs sewers. Regulations to protect natural waterways are weak or unenforced. Meanwhile, electrical and transport infrastructure lack climate-proofing. Kolkata’s drainage was no match for the simultaneous downpour and a high tide that locked water in. This scenario is a mirror to many Indian cities where infrastructure lags behind climate risk.

Kolkata’s calamity highlights several priority actions for climate-proofing infrastructure. First, cities must invest in modern stormwater infrastructure — wider drains, additional pumping stations, and retention basins to temporarily



CLOUD BURSTS. Becoming much more frequent REUTERS

hold runoff. Designing drainage for extreme downpours is key.

Second, natural buffers like wetlands, lakes, and rivers must be restored. Preserving and restoring these urban ecologies is cost-effective flood protection. Urban planners should integrate blue-green infrastructure like parks, ponds, and open spaces, which often cost less and offer more benefits than only expanding concrete drains.

Third, city development plans must discourage construction in high-risk flood zones. These areas should be left for water flow or designed as open parks that can flood safely. Cities like Surat have begun mapping flood-prone zones and relocating or elevating infrastructure out of harm’s way.

Fourth, improving weather forecasting and flood warning dissemination can save lives and property. When people get alerts to avoid flooded areas, casualties like Kolkata’s electrocutions can be prevented.

Finally, critical utilities need to be crisis-proof. Urban floods often bring secondary crises like electrocutions and water contamination. Utilities must adapt — for example, electrical cables can be moved underground or insulated to reduce the risk of live wires in water.

All these measures require significant investment. Public spending on urban infrastructure must increase. India currently spends only about 0.7 per cent of GDP on urban infrastructure, well below what fast-growing cities require. State governments can create urban resilience funds or budget lines to co-finance city projects. Urban local bodies, despite limited revenues, must improve their financial capacity — better property tax collection, user charges for improved services.

Kolkata’s flood is a clarion call for urban policymakers. By financing and investment, urban areas can endure extreme weather with far less disruption.

The writer is Junior Fellow, ORF



UDAY BALAKRISHNAN

On October 2, we will mark the 157th birth anniversary of Mahatma Gandhi. His presence is inescapable — on currency notes, in portraits on government walls, in the names of streets and institutions. Yet for India’s youth, Gandhiji is strangely absent. For a generation to whom even Atal Bihari Vajpayee is a receding memory, Gandhiji often exists more as a symbol than as a guide. And yet he deserves to be rediscovered, for many of the values young Indians instinctively prize — equity, inclusivity, justice — were first articulated and lived by him.

Gandhiji was the voice of India’s “voiceless millions.” His Khadi campaign, his insistence on the dignity of labour, and his call for trusteeship of wealth were radical demands for justice, not eccentricities. His philosophy of *satyagraha* — resisting injustice without hatred — became the grammar of protest across the world. From Martin Luther King Jr to Nelson Mandela, from anti-apartheid struggles to campus movements, his method of non-violent resistance continues to inspire.

What makes Gandhiji so important today is how contemporary he sounds. Amartya Sen’s idea of development as freedom, Jean Drèze’s advocacy of social security, and P Sainath’s chronicling of rural distress all echo Gandhiji’s conviction that justice must begin with the poorest. Thomas Piketty’s critique of inequality parallels Gandhiji’s plea for trusteeship, while Michael Sandel’s warning against markets overrunning moral life recalls Gandhiji’s caution that wealth without responsibility corrodes society. Gandhiji may have spoken in the idiom of spinning wheels and ashrams, but the great debates of the 21st century still walk on paths he first cleared.

My generation, now in its seventies and eighties, may be the last to have heard first-hand accounts of Gandhiji. For us he was not a distant textbook figure but a living presence in stories of freedom, Partition, and sacrifice. Serving across India in government postings, often in rural heartlands, I saw how prescient Gandhiji had been.

He grasped three truths that still shape us: Hinduism could not survive



JOTH RAMALINGAM B

# Gandhiji matters to Young India

## ENDURING RELEVANCE.

Much of the Mahatma’s values — communal harmony, caste and income equality — resonate even today

unless it confronted caste inequality; Muslims could never feel secure unless they were accepted as full citizens in a Hindu-majority nation; and the poor would not be free until they were treated with dignity and lifted from poverty. He also understood, long before environmentalism became a global concern, that reckless exploitation of nature would destroy the planet.

Addressing the faculty at the Indian Institute of Science in 1927, Gandhi warned that unless discoveries were harnessed for the welfare of the poor, they risked becoming sterile. “Just as some of the experiments in your laboratories go on for all twenty-four hours,” he urged the scientists to “let the big corner in your heart remain perpetually warm for the benefit of the

Gandhiji may have spoken in the idiom of spinning wheels and ashrams, but the great debates of the 21st century still walk on paths he first cleared

poor millions.” That admonition rings true today.

Unlike most leaders, Gandhiji’s understanding of India came from relentless travel, criss-crossing the country by train, bullock cart, and on foot. He lived in huts and ashrams, spoke with workers, and listened to the poorest. This intimacy with India’s diversity made him the first truly pan-Indian leader.

## SETS THE COMPASS

On caste, Gandhiji’s clash with Ambedkar was sharp. Yet the 1932 Poona Pact forced Hindu society to confront its worst injustices and laid the groundwork for reservations later enshrined in the Constitution. Millions of Dalits still draw strength from that convergence.

On Hindu-Muslim unity, Gandhi stumbled. He could not check Jinnah or stop Partition. Yet, with Nehru, he reassured Muslims that they were equal citizens of free India, no less than the Hindu majority. Today, India is home to the world’s largest Muslim minority whose place in the nation still carries

## STATISTALK.

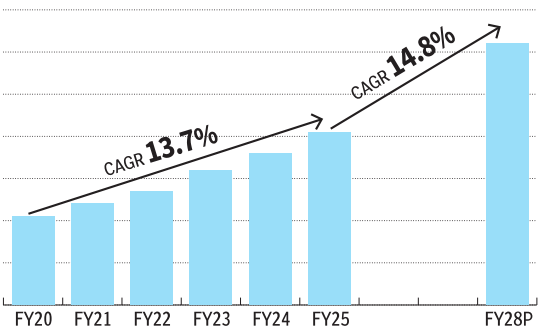
Compiled by Nishanth Gopalakrishnan | Graphic KS Gunasekar

### Understanding India’s housing finance market

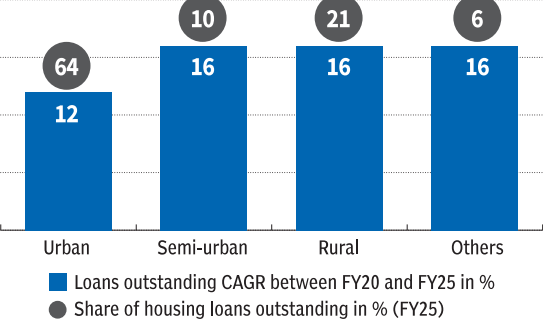
India’s mortgage to GDP stands at 16.6% as of FY25, having grown from 9.1%, five years ago. Yet, this is low compared with China’s 28% and US’ 60%. Hence, the headroom for growth in housing loans is robust, expected to grow quicker than the rate seen in the last five years. Since the pandemic, premium housing has seen phenomenal growth and thus, loans with ticket size over ₹50 lakh now occupy a larger share. Growth in semi-urban and rural markets outpacing that in urban markets is another trend that the numbers reveal

#### Robust growth expected in housing loans market

Housing loans outstanding (₹ lakh crore)

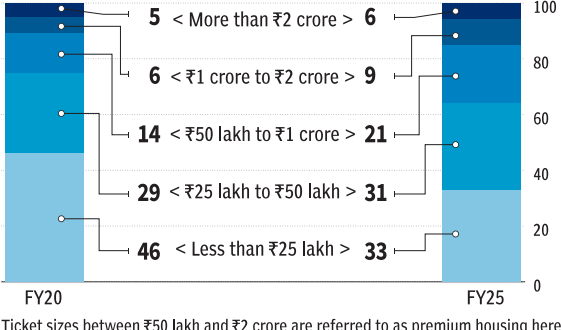


#### Rural and semi-urban regions have grown faster than urban



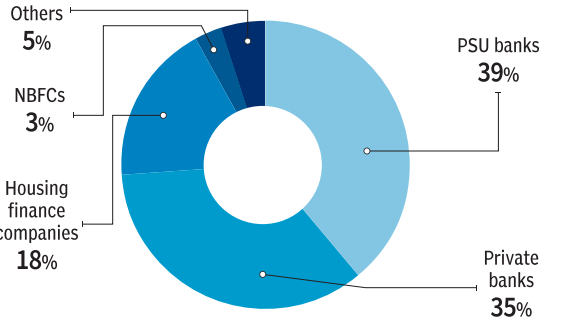
Source: Tata Capital’s RHP

#### Premium housing’s quick growth since the pandemic



#### Banks dominate the market

Share of housing loans outstanding in % (as of FY25)



## thehindubusinessline.

### TWENTY YEARS AGO TODAY.

October 1, 2005

#### Economy logs 8.1 pc growth in Q1

Belying negative projections, the Government presented an impressive report card that shows that the economy grew 8.1 per cent in the first quarter of the current fiscal, against 7.6 per cent in April-June 2004. The higher growth was brought about by a buoyant manufacturing sector, which grew 11.3 per cent, and the services sector, which continued with its robust performance. .

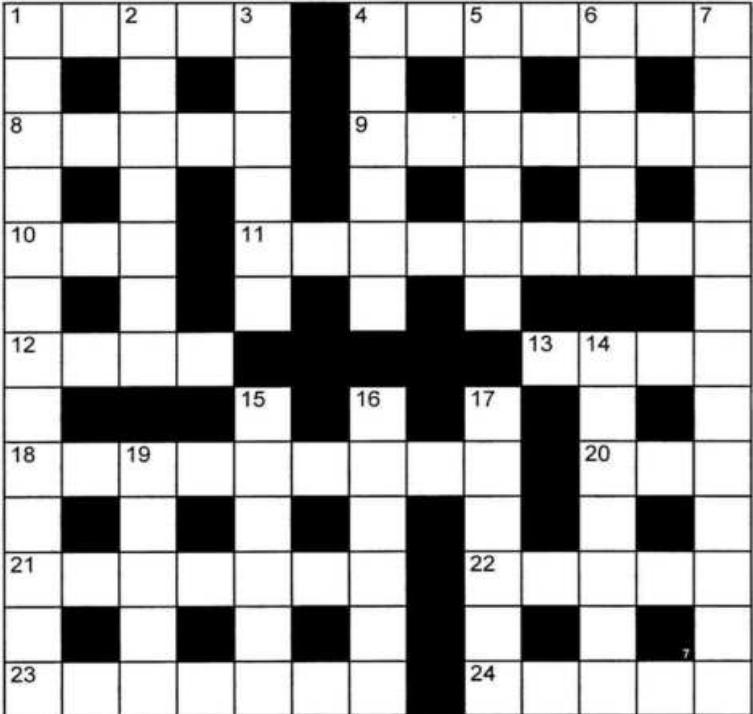
#### Laid-off workers may get higher compensation

The Government is planning to amend the Industrial Disputes Act to increase the compensation for laid-off workers. It is also working on a proposal to keep out units employing up to 300 workers from the purview of the Act. The plan is to increase the compensation package for laid-off workers to 45 days of salary for every year served against the existing provision of 15 days.

#### Housing loans may be excluded from priority sector lending

Housing loans may no longer be eligible to be considered under the category of priority sector lending by banks. At present, loans up to ₹15 lakh to individuals for construction of houses and ₹2 lakh for repairs are eligible for consideration under priority sector lending.

## BL TWO-WAY CROSSWORD 2794



### EASY

#### ACROSS

- Fast, swift (5)
- One in domestic employment (7)
- Peace undertaking (5)
- Take one’s ease (7)
- Mat (3)
- Amusement; circuitous route (9)
- Additional amount (4)
- Hare’s tail (4)
- Put a stop to (9)
- Digit afoot (3)
- Carrying-bag (7)
- Florida resort (5)
- Girls related (7)
- Motif (5)

#### DOWN

- Repeat fixtures of same teams (6,7)
- Push-down lever (7)
- Greatly fears (6)
- Try hard (6)
- Happens again (6)
- Plea of absence from crime (5)
- Conforming with pattern (6,3,4)
- Salt of citric acid (7)
- The face (6)
- Blemishes, defects (6)
- Allow (6)
- Makes into a cylinder (5)

### NOT SO EASY

#### ACROSS

- Is quick to get change paid right at the beginning (5)
- Menial who ran about with vest (7)
- About beginning of century is right as fighting stops (5)
- Lie will be concerned with a hundred on the row (7)
- Travelling-wrap may be put on the floor (3)
- It may be amusing, its making people go roundabout way (9)
- Sir Thomas was wanted by Oliver (4)
- Hare’s last appearance axed after start of Spring (4)
- Finish with Hilary in a half of the test (9)
- Tee often encourages beginners to use front of club (3)
- Item of baggage seemingly indicates none other is needed (7)
- First motorway here repeatedly given a centre in Florida (5)
- Resist changes made to the South by the Pleiades (7)
- An anthem explicitly showing subject to be developed (5)

#### DOWN

- Give back lights for second engagements of same teams (6,7)
- One diving gets control being depressed (7)
- Doctor Sade was upset, which one is horrified by (6)
- Struggle to burst the rivets (6)
- In rigorous extremes work out cure that keeps happening (6)
- A Liberal one claims one wasn’t there when it happened (5)
- Conforming to the start of a distance event? (6,3,4)
- It is included in a large box of salt (7)
- Face six differing ages (6)
- They are wrong to be served out of court (6)
- A lady’s instruction to her hairdresser in document form (6)
- Turns over and over, so car begins to move (5)

### SOLUTION: BL TWO-WAY CROSSWORD 2793

ACROSS 1. Earthquakes 8. Paged 9. Lingers 10. Reddens 11. Lance 12. Saying 14. Adores 18. Defer 19. Recover 21. Distort 23. Loose 24. Restriction

DOWN 1. Exports 2. Rigidly 3. Hedge 4. Unless 5. Kindled 6. See 7. Paste 13. Nervous 15. Ravioli 16. Surgeon 17. Grater 18. Dodge 20. Colic 22. Sir





OPINION

The  
Hindustan Times  
ESTABLISHED IN 1924

{ OUR TAKE }

Dealing with a suicide crisis

Institutional remedies and interventions at various levels are necessary to address mental health issues

At 12.3 per 100,000, India's suicide rate in 2023 was the second-highest since 1966, when the National Crime Records Bureau (NCRB) started giving such data. The highest suicide rate, of 12.4, was recorded in 2022. That the spike in suicides post the Covid-19 period was yet to abate in 2023 reflects persisting agony, perhaps from the exacerbation of factors contributing to suicide.

The insidious nature of economic vulnerability and suffering comes through upon reading some datapoints from the just-released NCRB 2023 report. Family problems and illnesses were the two leading causes behind suicide in India, and that too by a wide margin. Suicides due to indebtedness were just a small fraction compared to suicides due to illnesses, and even smaller in comparison to family problems. Daily wage earners and housewives constituted the two largest occupational groups among suicide cases, even as two-thirds of deaths were of people who had never attended college. In a low-middle-income nation like India, it is hard not to see correlations with dimmer prospects and financial troubles seeping into familial dynamics and treatment costs, fostering distress and despair.

As several factors, from conflict between nations to the march of technology, leave their imprint on economies and new sources of distress emerge — mass loss of lives, job loss, forced migration as also its effects on immigrant-receiving societies, resource competition, polarisation — vulnerability will only worsen. Given no geography can hope to remain untouched, the trends in suicides should be a warning for a country like India to invest in reducing vulnerability and improving mental health for millions.

Keeping a suicide crisis under check will need the nation to think beyond suicide helplines. These helplines are certainly important, but accessed as they are at a much later stage in the progression of suicidal behaviour, a comprehensive prevention outlook is needed. Interventions are necessary at all levels and in all forms, across age groups. From regular mental-health monitoring in schools/colleges to affordable, de-stigmatised counselling for individuals and families, from targeted mental health support services for occupational groups to awareness campaigns, solutions will have to come together as a weave of societal and governance interventions. All of this will need serious capacity. To start with, India must increase its psychiatrist strength; currently, it is estimated to have less than one psychiatrist per 100,000 population against the WHO recommendation of three. And, of course, the larger policy ecosystem will have a role to play when it comes to reducing the economic vulnerability of people and building more secure populations.

Rebuild the ground for dialogue in Ladakh

The breakdown in the talks scheduled between the Centre and the two local outfits heading the stir in Ladakh is unfortunate. The Leh Apex Body (LAB) withdrew from the dialogue after the arrest of Sonam Wangchuk; the Kargil Democratic Alliance (KDA) followed suit on Tuesday. The KDA has demanded that Wangchuk be released and a judicial probe ordered into the firing by the security forces on September 24. The administration of the Union Territory (UT) would do well to temper its tough talk regarding Wangchuk — it has accused the Ladakhi activist of instigating the protests that led to the firing and the death of four protestors, one of them a Kargil War veteran, and arson involving public buildings and a BJP office in Leh — and prepare the ground for the resolution of local demands.

Ladakh's current crisis can be traced to the debate over governance and the development projects proposed for the region. However well-intentioned the UT administration's proposals may be, they need to pass muster with the resident population. The former must respect the agency of the local population and hear out their concerns. What may be deemed as barren land could be pasture that has been a part of the commons, and the transfer of such land to corporations or private interests, irrespective of perceived benefits to the local economy, could trigger fear of land alienation. The demand for statehood and extension of the Sixth Schedule of the Constitution to Ladakh must be seen in this context instead of being over-read as a conspiracy against the nation. Kargil and Ladakh have been bulwarks against the designs of Pakistan and China in the region. That confidence should guide the Centre as it engages with the concerns of the region.

Made in India AI, for India and the world

If India doesn't develop *aatmanirbharta* in AI, our future may involve having AI services powered by our own data, but owned by others, and then sold back to us

As Artificial Intelligence (AI) continues to transform and revolutionise the way we live and work, it's essential to recognise its vast potential and harness its power to drive positive and constructive societal change. It is imperative for India to develop sovereign capabilities in this field for three primary reasons.

First, *aatmanirbharta* (self-reliance) will spur our domestic start-up ecosystem and attract private sector investment. Other AI leaders are already seeing the benefits of this independence. For instance, China recently banned Nvidia chips to boost sovereign chip-making capacity.

Second, building AI attuned to the nuances, culture, history, and languages of India will make AI accessible and applicable to every Indian. Third, responsible sovereign capability in this field will become increasingly important for national security. For this, you need advanced models that keep clear records of where their data comes from (data-lineages) to prevent hidden malicious behaviour that could emerge at

critical moments.

The essential ingredients for building this capability are threefold: Data, computing power, and skilled talent.

Today, OpenAI's ChatGPT in India reportedly has more monthly active users than in any other country. OpenAI, which has raised around \$40 billion in total funding, is burning \$1-2 billion each month to attract users by giving services at zero cost. This predatory pricing is encouraged by US policies, which seek to import data and actively export AI.

Apart from user acquisition, companies are using our data to train more superior, closed-source AI models. If India doesn't develop *aatmanirbharta* in AI, our future may involve having AI services powered by our own data, but owned by others, and then sold back to us. Instead, we should adopt the best features of global models, let them work within India, but set rules that encourage Indian and foreign investment.

The Union government, through initiatives like the India AI Mission, has taken bold steps to support Indian start-ups to build sovereign models from scratch. However, unless these models are used on Indian data in the service of every Indian, their true potential will never be realised. India should ensure that sovereign AI reaches the last mile and provides a bulwark against AI use that leads to wealth centralisation.

In technology, sometimes those who come second can actually build faster, learn smarter, and skip the pitfalls. A massive opportunity exists for India to

leapfrog in AI, by addressing the following issues.

First, the government should only deploy sovereign or open-source models that are securely run on sovereign infrastructure for its internal operations. Using closed-source models with non-auditable behaviour poses serious security risks. Additionally, partnerships such as the recent All India Council for Technical Education (AICTE) initiative

offering free licences to foreign model providers for students and teachers should be disallowed. Such arrangements result in valuable data leaving India, which can be used to profile Indian citizens and improve foreign models. They also undermine fair competition through predatory pricing.

In AI, data is a fundamental input that directly influences the quality and capabilities of the core product.

Second, the government should require that all AI models and application programming interfaces (APIs) serving users in India operate on infrastructure hosted entirely within Indian borders. No user data should flow outside India for applications involving large language models (LLMs). This approach will attract significant private investment in computing infrastructure, such as graphic processing units (GPUs) and other accelerated hardware, and improve privacy protections for Indian citizens by preventing data from leaving the country and benefiting foreign AI capabilities at India's expense.

Our computing capacity remains vastly behind global leaders. For exam-



Amitabh Kant



In technology, sometimes those who come second can actually build faster, learn smarter, and skip the pitfalls.

SHUTTERSTOCK

ple, OpenAI and Nvidia will soon be scaling to 10 gigawatts of GPU capacity, whereas India's current capacity is around 30,000 GPUs. Bridging this gap requires massive private sector investment and foreign direct investment (FDI).

The government must aggregate demand and provide access to sovereign models as a public good. The same computing infrastructure used for inference can also be harnessed to train new models. This concept aligns with Nvidia CEO Jensen Huang's idea of "intelligence factories" dedicated to AI "manufacturing". The "manufacturing" of AI within India must be promoted with 100% local value addition, while welcoming global capital and intellectual property.

Third, the government should work on creating a new type of Digital Public Infrastructure (DPI) that integrates all government services, tourism data, NCERT educational content, emergency services, schemes, railway bookings, the Swayam platform, and similar systems. The government should then encourage developers of sovereign models and applications to create platforms that comply with this infrastructure. These platforms would give all Indian citizens easy access to sovereign AI models, government services, and knowledge bases like NCERT textbooks. This approach would enable any citizen to access a

wide range of services through a simple, intuitive platform where they can just ask for what they need. To increase reach, multiple modalities such as voice, mobile apps, and messaging platforms should be used.

Fourth, by significantly increasing AI demand in a country of 1.4 billion, both through mandating inference within the country and providing AI services to Indian citizens, India can attract substantial private sector investment in computing infrastructure. This will also encourage FDI and help bring back top global AI talent. Better access to computing resources will reassure talented researchers worldwide that India is a viable place to pursue advanced AI research.

India needs a dedicated national programme focused on attracting and retaining top-tier AI experts. This will lead to better methods for curating data and sharing non-personally identifiable information as a public good, as platforms like AI Kosh under the India AI mission are already doing. Ultimately, this will create a virtuous cycle of data, computing power, and talent — driving India's AI capabilities forward and enabling us to leapfrog in the field.

Amitabh Kant is former CEO of NITI Aayog and was India's G20 Sherpa. The views expressed are personal

A UN Gaza genocide report, dead on arrival

The world's worst-kept secret is that Israel is committing genocide in Gaza. The latest report of the UN Commission of Inquiry is substantive re-confirmation of this truth. It is telling that the report amounted to little at the recent United Nations General Assembly (UNGA) session that saw intense debates involving world leaders on the state of Gaza.

However, it is important to look at some of the recommendations in the UN report and its implications. The report asked the government of Israel to immediately end the commission of genocide in the Gaza Strip and comply fully with the provisional measures outlined by the International Court of Justice in its orders of January 26, March 28, and May 24, 2024. Arrest warrants had been issued by the International Criminal Court (ICC) against Israeli Prime Minister Benjamin Netanyahu and defence minister Yoav Gallant on November 21, 2024. In the past 10 months, these leaders have visited, or are scheduled to visit, countries such as Hungary, Argentina, the Czech Republic and Romania, countries that are signatories to the international law, without fear of arrest. France, as usual, dithers, stating that Netanyahu will not be arrested while he is in office. The US, of course, is beyond the pale with its support for the Netanyahu regime. It has, in fact, sanctioned judges and prosecutors of the ICC and Francesca Albanese, the UN's special rapporteur for human rights in the Occupied Palestinian Territories.

Article 27 of the Rome Statute explicitly states that official capacity as a head of State or government, member of a government, or parliamentarian does not exempt a person from criminal responsibility nor does it constitute a ground for reducing a sentence. This provision establishes that no immunity shields individuals from prosecution before the ICC, regardless of their position.

The UN commission asked for immediate implementation of a complete, permanent ceasefire in Gaza and an end to all military operations in the occupied Palestinian territory that involved the commission of genocidal acts. This was dead on arrival, thanks to the US veto in the UN Security Council — this is the sixth time the veto has been exercised by the US.

The commission also recommended that all member-States employ all means reasonably available to them to prevent the commission of genocide in the Gaza Strip. Meanwhile, the death toll in Gaza has crossed 66,000.

The present UN commission was created by a resolution of the United Nations Human Rights Council (UNHRC). The UNHRC is a subsidiary body of the UNGA. The UNGA is a body that expresses the intent of the member-States.

The Security Council is the body that exercises real power. In the real-world context, India, Germany, Brazil and South Africa should have been there as members of the Security Council a long time ago. Lest it be forgotten, the United Nations presently are the words reversed — powerful nations united against real democratisation of the world order. We tend to forget the Orwellian truism: Some animals are more equal than others.

The UN commission asked for ceasing the transfer of arms and other equipment or items, including jet fuel, to Israel or third States where there is reason to suspect the use of these arms and equipment in Israeli military operations that have involved or could involve the commission of genocide. Both North American countries, most of Europe, and even India fall foul of this recommendation.

The commission asked States to ensure individuals and corporations in their territories and within their jurisdiction are not involved in the commission of genocide, aiding and assisting the commission of genocide or incitement to commit genocide and investigate and prosecute those who may be implicated in these crimes under international law. The UK, Australia, Canada, New Zealand, and Norway have imposed sanctions against the Israeli finance minister. Slovenia has declared him *persona non grata*. The Netherlands has banned his entry, citing his support for ethnic cleansing. However, Israeli finance minister Bezalel Smotrich visited New Delhi in early September.

In January 2003, this writer, in this newspaper, had stated that India had signed a bilateral agreement with the US — not to surrender each other's nationals to the jurisdiction of the ICC. According to the *Washington Post*, as of February 2024, some 23,380 American citizens were serving in the Israeli army, many of them émigrés to Israel, though reservists living in the US have been called back to Israel to fight. Some 21 Americans in the Israel Defense Forces (IDF) units have been killed inside Gaza, another one died along Israel's northern border with Lebanon, and another was killed in Jerusalem while serving in Israel's border police. If they come to holiday in India, they have immunity from arrest.

India ratified the Genocide Convention in 1959. But it has not brought in concomitant rules and regulations in domestic law till date. At issue is Article 98 of the ICC's treaty, which was designed to allow governments to devise orderly procedures to implement the treaty's preference for prosecution by national authorities. This provision was premised on the ICC's ability to assume jurisdiction of a case, should it find that an investigation or prosecution was not conducted in good faith.

The US department of State has an office that deals with war crimes, though it is now known as the Office of Global Criminal Justice (GCJ). The office advises the secretary of State on matters related to genocide, crimes against humanity, and war crimes. In US President Donald Trump's second term, the post of ambassador for GCJ has been left unfilled. There were proposals in April 2025 to close the office, and it remains barely operational now.

To all the righteous friends of Israel, the old Testament should be acceptable. Jeremiah 5:21 states: "Hear now this, O foolish people, and without understanding; which have eyes, and see not; which have ears, and hear not".

Ravi Nair is director, the South Asia Human Rights Documentation Centre. The views expressed are personal



Ravi Nair

{ NARENDRA MODI } PRIME MINISTER, INDIA

It provides a viable pathway to long-term and sustainable peace, security and development for the Palestinian and Israeli people, as also for the larger West Asian region

On Donald Trump's plan to end the Israel-Gaza conflict

States are key to driving e-truck adoption in India

When Madhya Pradesh launched the second phase of its electric vehicle (EV) policy in February 2025, it became the first state in India to support electric truck (e-truck) deployment. A few months later, Maharashtra announced its EV policy, with a clear target for e-trucks to reach 20% of new sales by 2030. Both came after the ministry of heavy industries launched the PMS-DRIVE scheme, which includes demand incentives for e-trucks, in October 2024.

Madhya Pradesh's EV policy exempts e-trucks from motor vehicle tax and registration fees for two years, and Maharashtra's policy provides a purchase subsidy of ₹20 lakh for the first 1,000 e-trucks registered in the state. Given that research by the International Council on Clean Transportation (ICCT) estimates the total cost of ownership of e-trucks being 1.2-1.6 times higher than their diesel counterparts, such state-level incentives, combined with the PMS-DRIVE, can play bridge the gap in the cost of ownership for e-trucks and even make it cheaper than that of diesel trucks.

State-level support for the transition to e-trucks is particularly important because the diverse use-cases and unique drive cycles of the truck segment make it quite different from other segments, including light-duty vehicles. Indeed, initial e-truck deployment in India — limited to pilot projects thus far — has been undertaken by large companies in range-limited, closed-loop operations such as in the cement and steel industries. Given this, supporting policies are most effective if tailored to industrial clusters and trucking operations within each state. With a couple of states having made a strong start, here's how more can be done to accelerate e-truck adoption.

First, incentives play an important role in maximising savings on the total cost of ownership for users. Currently, the purchase price of e-trucks is 2-3.5 times higher than it is for diesel counterparts; this is a significant barrier despite the lower cost of operations for e-trucks. Fiscal incentives from states in the form of subsidies, interest rate subvention, and road tax and registration fee waivers can help lower the barrier significantly. Moreover, if these incentives support more pilots, it could demonstrate the techno-economic viability of e-trucks and prompt more users to adopt. Operations-based incentives, such as toll waivers and non-fiscal incentives like green channels and restricting the free movement of conventional trucks, can further help make e-trucks an attractive proposition.

Second, zero-emission vehicle mandates at the subnational level can help ensure the supply

and deployment of EVs. A recent paper published by a group including ICCT researchers found that India is among the top five countries globally in terms of premature deaths and paediatric asthma cases from road transport-related air pollution. Cities such as Delhi are major hotspots, especially for nitrogen dioxide-attributable childhood asthma. Addressing this serious public health burden will require targeted action at both the subnational and city levels. This can be done by mandating a phased adoption of e-trucks in applications that are easiest to electrify because of characteristics such as predictable routes and closed-loop operations. These include municipal trucks such as water tankers, those used for garbage disposal, trucks deployed for the movement of raw material, trucks that transport finished goods in steel and cement clusters, and trucks deployed for moving containers within a port

and from a port to nearby areas. Both national and subnational incentives can be availed to scale e-truck deployment for these use cases. This can also promote environmental justice by helping to alleviate health issues in communities disproportionately affected by diesel truck emissions.

Finally, a transition to e-trucks requires a plan to deploy charging infrastructure along the routes they traverse. The Maharashtra EV policy identifies two corridors — the Mumbai-Pune and Mumbai-Nagpur expressways — for such deployment. This is key to ensuring smooth operations in corridors connecting major industrial clusters and those with heavy freight traffic. Further, truck terminals serve as key hubs for truck parking and operations. Sanjay Gandhi Transport Nagar in Delhi sees an average of about 2,500 trucks parked daily. Going forward, these terminals could be equipped with charging infrastructure to offer long-duration charging for e-trucks while they park.

National policies such as the PM E-DRIVE scheme provide a much-needed base and push for electrifying freight. But the real momentum will get generated when states lead the charge. India's diverse geography, freight patterns, and economic contexts demand localised strategies. What works for Delhi may not suit Maharashtra. By tailoring incentives, infrastructure investments, and regulatory frameworks to their specific contexts, states can push e-truck adoption and ensure it happens in a way that's equitable, efficient, and sustainable.

Harsimran Kaur is researcher, International Council on Clean Transportation. The views expressed are personal



Harsimran Kaur



## Follow up on FTAs

Govt must help exporters to benefit from trade deals

The free-trade agreement (FTA) between India and the European Free Trade Association (Efta) will come into force today, more than a year after it was finalised and signed. Given India's other trade woes — the 50 per cent tariff currently imposed on exports by the United States (US), and the long delay in finalising an agreement with the European Union (EU) — it is not surprising that the government is emphasising this. And Efta is certainly good news. This small bloc of developed nations — comprising Switzerland, Norway, Iceland, and Liechtenstein — may not be as influential a grouping as its larger cousin, the EU. But several of the countries in question are financial powerhouses, and the agreement includes promises of \$50 billion in investment over its first decade of operation.

The agreement represents unusual flexibility from Indian negotiators. Tariffs on many imports from the Efta nations will be eliminated, and the duties on Indian exports to those countries were not very high anyway. It is encouraging that Indian officials have recognised that a greater set of deals is possible when dropping the country's high tariffs can be set off against other benefits, such as increased investment. The age in which trade agreements consisted purely of a reciprocal lowering of tariffs on goods is over. Multiple other vectors — including investment, harmonised regulations, and the reduction of non-tariff barriers — are also on the table.

The government must also recognise that FTAs are welfare-enhancing only if they are used. In the past, there have been complaints that Indian exporters have not been able to take proper advantage of FTAs such as those that have been signed with Japan and the Association of Southeast Asian Nations (Asean). Since the signing of the FTA with Asean, for example, Indian exports to the region have not grown as much as imports from it. While that does not in any way represent a loss of welfare, it represents a lost opportunity. Some of that underperformance by Indian exporters might well be due to an inability to navigate the FTA's clauses and benefits, or simple lack of awareness about the ways that small businesses could access these newly open markets. Correcting this problem should ideally have been a major priority for the government.

Government bodies supposed to do this job should work with businesses consistently to not only make them aware of the export possibilities, but also address issues such as non-tariff barriers that Indian firms often face, particularly in developed markets. As India signs FTAs with other countries and trading blocs, such mechanisms will become more critical. Indian firms, particularly smaller ones, must be provided guidance to help them navigate global markets. In the context of getting into new trade agreements, publicising Efta among stakeholders will enable them to utilise it properly and prepare for the agreement with the EU. And it certainly must be concluded soon — especially given the continued intransigence of American President Donald Trump in holding up a trade agreement with his country, and the increasing pressure on Europe to reduce trade ties with India over its purchases of Russian oil. Deals with the United Kingdom and Efta are all very well, but the prize is the EU, and officials should not lose sight of that goal.

## Trading carbon

A well-functioning market can enable India's green transition

Ahead of the 30th Conference of Parties (COP) next month in Belém, Brazil, India is set to operationalise its Carbon Credit Trading Scheme (CCTS) by the end of October and join the United Nations-supervised voluntary carbon market from January, marking a turning point in climate governance. Despite its lower historical emission, India's policies are among the most ambitious, especially its commitment of 500 gigawatt of renewable capacity by 2030 and the target of net-zero by 2070. The first phase of the CCTS will target industries such as aluminium, cement, and pulp and paper, covering 282 units that also include large business groups. The scheme will be further expanded to cover sectors such as steel, refineries, petrochemicals, and textiles. The design is clear. Build a compliance-driven cap-and-trade system where firms that outperform emission-reduction targets can sell surplus credits, while laggards must pay for excess emission.

Other than meeting India's climate objectives, the domestic carbon market has profound implications for the country's export competitiveness. The European Union has already operationalised its Carbon Border Adjustment Mechanism (CBAM), which will tax imports from countries with weaker carbon regimes. Unless Indian producers can credibly demonstrate their emission performance, they risk losing access to lucrative markets. Moreover, cross-border carbon trading can enable Indian firms to sell credits abroad, which would not only help offset transition costs but also deepen India's integration with global green value chains. By aligning domestic industry with global carbon standards, CCTS could act as both a shield against trade barriers and encouragement for green exports. But at the same time, smaller firms, lacking access to finance and clean technology, should not be left behind. Concessionary credit and capacity-building initiatives can enable these enterprises to participate in the carbon market, generate offsets, and remain competitive.

Global experience also offers valuable lessons. The European Union's Emissions Trading System (ETS), for instance, has helped reduce emission by around 47 per cent in covered sectors since 2005. However, it took years of course correction, particularly to address the early oversupply of credits, which depressed carbon prices and blunted incentives. At the same time, China's national carbon market, though the largest by volume, still struggles with weak data integrity and thin trading. India should work towards avoiding these pitfalls by prioritising accurate monitoring, reporting, and verification (MRV) frameworks, ensuring penalties for non-compliance and preventing speculative distortions. One way to tackle this is through digitally verified carbon offsets (DVCOs), which use blockchain and digital tracking to ensure the integrity of credits. Such tools can help prevent double-counting, improve transparency, and assure international buyers of the quality of Indian credits. For investors focused on economy, society, and governance, this reliability will be crucial in determining whether to channel capital into India's sustainable projects. The CCTS, combined with DVCOs, could thus attract foreign capital flows and incentivise global funds to back India's decarbonisation push. Done right, the CCTS could transform carbon trading into a catalyst for green industrial transformation.

## AI and the written word



NEHA KIRPAL

I recently completed a training that equips media professionals with practical artificial intelligence (AI) skills to enhance efficiency, boost productivity and support the adoption of technology for a future-ready workforce. Reading author and educator Manjima Misra's latest book exploring the intersection of AI with narratology, creative writing, feminism and law reiterated some of these learnings. Focusing on the importance of storytelling, the book offers a balanced assessment of both AI's capacities and limitations.

At the very outset, Ms Misra emphasises the uniqueness of the human voice in creative writing, taking examples of extracts from timeless classics to make her point. In the chapter on human-AI collaboration, she discusses several ways in which AI is useful, including brainstorming plots, refining drafts, accelerating workflows, offering novel prompts, creating dialogues and making research more efficient. For instance, AI tools such as ChatGPT can be used to name characters based on genres and personalities as well as name and describe places and settings in novels. Ms Misra adds that since linguistic production differs across AI tools, it would benefit writers to synthesise their best aspects instead of restricting oneself to a specific AI tool for collaborative writing.

Another interesting human-AI collaboration could be in the sphere of human educators collaborating with AI tools to develop learners' writing skills.

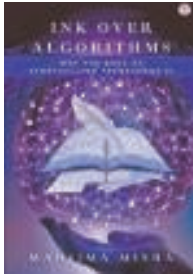
"AI tools can provide students with a wide variety of prompts — in written, image and video formats, which can be further utilised to ignite students' imagination," Ms Misra writes. However, she adds that a writer needs to exercise one's discretion while refining the sentence structure to make it more readable and comprehensible.

Ms Misra goes on to describe the creative writing-enabled brain of AI, elucidating that AI basically works on an input-output based model, and that machine learning is all about finding patterns from real-world sources. While analysing ethical and legal considerations in AI-assisted writing, Ms Misra also emphasises the fact that the act of presenting AI-generated content as one's own work without attribution raises ethical concerns. "It undermines the principle of intellectual honesty and misrepresents the writer's creative contribution," she writes.

In the section on news writing with

AI, Ms Misra highlights issues of truth and accountability, warning us of the potential for misinformation, algorithmic bias and fact-checking inaccuracies. News organisations could benefit from using AI as a research assistant, data gleaner, and distribution agent. "AI tools can also be used to translate with accuracy, summarise with a level of audience-based customisation, generate representational images with full disclosure, create video elements and audio where footage or clips are not available, as well as for marketing mailers, social posts, visualisations...but always with a human in the loop," as Nandagopal Rajan, chief operating officer of *The Indian Express* sums it up.

According to the 2023 Global Gender Gap Report, only 30 per cent of women work in the field of AI. "AI systems trained on data primarily created by men, and based on men, are



**Ink Over Algorithms: Why the Soul of Storytelling Transcends AI**  
by Manjima Misra  
Published by Highbrow  
Scribes Publications  
95 pages ₹399

representative narratives. Ms Misra provides several examples of how AI has rewritten more nuanced versions of fairytales, challenging many stereotypes, exploring complex moral dilemmas and reimagining story endings. She also shows how AI can adapt stories to different cultural contexts, geographical settings and

highly likely to generate content that mirrors and amplifies gender bias," writes Ms Misra. In the chapter on feminism and AI-driven storytelling, Ms Misra questions how we can protect women's voices in an increasingly automated culture, and whether AI can be a tool for feminist empowerment.

Ms Misra also devotes a chapter to the role of AI in children's literature. She believes that AI presents a compelling opportunity to challenge and transform traditional frameworks of fairytales into more inclusive, diverse and representative narratives. Ms Misra provides several examples of how AI has rewritten more nuanced versions of fairytales, challenging many stereotypes, exploring complex moral dilemmas and reimagining story endings. She also shows how AI can adapt stories to different cultural contexts, geographical settings and

languages based on prompts. "By embracing a symbiotic approach and addressing the ethical considerations that arise, we can harness the power of AI to create a future where all children have access to stories that reflect their experiences, inspire their imaginations and empower them to create a more just and equitable world," writes Ms Misra.

Filled with a number of insightful observations from various people in the field, the book is an essential read for students, writers, technologists, educators and policymakers. Ms Misra proves throughout the book that storytelling is a deeply human act. Rather than competing with AI, she urges writers to curate, question and craft with it — though with caution. In a sense, the book comes as a timely call to embrace AI as an assistant rather than a replacement — "a tool that enhances our capabilities but cannot replace our humanity," as writer Ahtushi Deshpande explains in the book's Foreword.

The reviewer is a New Delhi-based freelance writer

## Wooing billionaires & HNIs

India needs to get its billionaires to invest in the country, and its millionaires to return to boost growth



ILLUSTRATION: BINAY SINHA

With the external environment for trade, investment and security rapidly deteriorating since the advent of Donald Trump and two endless wars, India has its work cut out to drive growth and jobs. Exports are not going to shine anytime soon, and defence and security requirements will demand greater investments at home, driven hopefully by domestic sources of capital.

From the escalating nature of Mr Trump's actions against India, and his ever-widening set of demands, starting with trade concessions (mostly conceded) and then going on to levying extortionate tariffs for our purchases of Russian oil, including 100 per cent on non-generic pharma products and even films made outside the United States (not to speak of the \$100,000 levy on new H-1B visas), one conclusion is inescapable: This goes far beyond one man's whimsicality. Somewhere, the US Deep State has quietly joined the action.

It is now clear that the US sees India as a future threat and would not like to aid its rise, which would apply to China as well. Both the reigning superpower and its challenger are now going to try and slow us down. India's rise will have to be driven by different global alliances, and, more importantly, by our own internal strengths.

We need large amounts of patient capital coming into technology (artificial intelligence, *et al*), defence, infrastructure, manufacturing, and even basic areas like quality education and affordable healthcare. While domestic investment may pick up if the economy rebounds after a fiscal consumption boost, we cannot expect venture capital and private equity alone to pick up the slack. True patient capital can only come from government and domestic investors with deep pockets.

Allocations for production-linked incentives (PLI) and other subsidies for building deep tech and artificial intelligence capabilities will add to fiscal burdens, not to mention the massive investments

needed in shipbuilding, fighter aircraft, and warship design and production that the security situation warrants. Additionally, India needs its own tech products and platforms, ranging from basics like email, maps, and social media to advanced tools. All this also requires massive capabilities in cyber security.

Many will wonder why some of this investment is not coming from India's billionaires, whose collective wealth now exceeds \$1 trillion, according to the latest Hurun Global Rich List 2025. India has 284 billionaires, but it is far from clear that most of their wealth is being invested in long-gestation areas that India needs. Worse, India is haemorrhaging high-net-worth individuals (HNIs). The latest Henley Private Wealth Migration Report says 3,500 of them will leave India in 2025. The good news is that this represents a falling trend compared to 2023 and 2024, when the figures were 5,100 and 4,300. Whether this is due to growing anti-immigrant sentiment in the West or a new-found love for the mother country is anybody's guess.

When you put India's huge need for patient capital, and the massive wealth now locked up in the large shareholdings of India Inc's big promoters or the relatively wealthy HNI talent now voting with their feet, three questions jump out at you: One, why aren't promoters putting more of their own personal wealth (as opposed to corporate free cash flows) to good use for the country? Two, what is the continuing attraction of foreign shores for the HNIs who continue to leave in droves? Is there a push effect, like poor ease of living conditions, for those who desire first-world lifestyles? And three, why aren't even cash-rich listed software services companies partially reducing their investor payouts and investing for the long term?

Our billionaires have enough paper wealth to not just leave a lot of money for their inheritors, but also to invest billions in long-term avenues that may be

ning to apply for H-1B visas — it is also aimed at foreign researchers and others that the UK wants to woo for its own technology research.

Meanwhile, several other European countries — notably Germany, Portugal, and France — are taking steps to attract more of the world's top talent. Some Nordic countries are also trying to attract global talent in search of attractive shores. Many Asian countries are also reportedly exploring measures to make themselves more attractive to global technology and other talent.

And China, which has now become the US' biggest rival in areas of science and technology, including artificial intelligence (AI), quantum computing, and biotech, having earlier introduced targeted programmes to bring back Chinese talent from the US, is now going all out to attract global talent as well. The newly announced K visa, starting from today (October 1), is designed specifically to attract foreign tech talent, even though China already has strong domestic talent in cutting-edge areas of science and technology.

While the US H-1B visa hike to discourage global STEM talent is likely to ensure that a large number of highly skilled workers from India and other countries will now seek opportunities elsewhere, Indian policymakers seem oblivious to the fact that this will not automatically mean that the best Indian brains will flock back to the country. The government seems to be unaware that it needs to take concrete steps to make India a popular destination for global tech and other talent.

If the Indian government is indeed serious about reversing brain drain, it needs to put much more emphasis on research and innovation, especially in areas that will determine the future. India's spending on research — by the government, in univer-

risky, but will generate even more wealth if they succeed. We don't have all the answers, but clearly the government needs to find out what it can do to reverse this reality.

First, it does not make sense for billionaires to bottle up so much wealth in personal shareholdings that cannot be used for investment. Management control is important, but surely holding idle paper wealth is hardly the way to go. Mukesh Ambani owns more than 49 per cent in Reliance Industries, whose value (ie, his part) would work out to more than ₹9 trillion at current market prices. How would using even 10-20 per cent of this wealth for investment in deep tech or long-gestation projects affect his control of the company? If needed, the government can provide a backdrop by guaranteeing institutional support for his stewardship as long as the company meets some operational benchmarks. What applies to Ambani applies to Gautam Adani or the Tatas or Birlas or the biginfo-tech companies, which are anyway rolling in cash.

As for bringing back the HNIs who are fleeing India, my hunch is that they don't have a problem investing in India, but living here has its lifestyle costs, what with poor urban governance, and daily frictions in dealing with government authorities and the regulators.

When the upper-middle classes seem to have found a way out of dealing with poor governance by retreating into gated communities, why does this not work for our HNIs? I suspect that it is the daily frictions (and poor quality of basic urban infrastructure) that drive them away, especially if they have to run a business, where extortion, demands for bribes for ordinary requests, and the heavy-handedness of the tax and police authorities make life painful.

Two possible ways out lie in giving them the best of both worlds: One is a limited period offer of dual citizenship, where they can decide whether or not to choose India for permanent settlement. And two, offering not just gated communities but also state-level concierge services where their business and personal interfaces with the government and regulatory authorities are managed through officially appointed agents.

If your child needs a birth certificate, this concierge will do the job for you. If your taxman is troubling you, an agent will deal with it. If your vehicle is involved in an accident, you can let him deal with the police and insurance companies, with the cost you pay being limited to penalties payable for your mistakes. There need not be daily harassment of people over these issues.

Getting our billionaires to invest in India, and our millionaires to return to boost growth should be high on the government's priority to-do list. For starters, the Prime Minister should invite India Inc for a tea meeting to discuss these issues. Something good can come from it. We must pull out all the stops to make Indian wealth work for India.

The author is a senior journalist

## The race for talent is slipping away

Shortly after United States President Donald Trump announced that fresh H-1B visa application fees were being hiked to \$100,000, a move ostensibly aimed at protecting domestic US job seekers against cheaper talent from India and other countries, a slew of Indian experts claimed that the country would gain massively from the move.

Their assumption was that because of the visa fee hike and other measures being taken by the US to curb the entry of foreign workers, a large number of Indians on H-1B visas, in fields ranging from technology to healthcare, would return to help develop these sectors in India.

This is wishful thinking. Various Indian policymakers and other luminaries, after making some encouraging and jingoistic statements, have not bothered to put together any concrete plan or announce any major steps to encourage Indian talent to return.

Contrast this with other countries that have been quick to make announcements designed to attract the talent that will become available because of the H-1B visa fee hike. Rachel Reeves, chancellor of the exchequer in the United Kingdom, announced that the country would make it easier to attract global talent, even as the US was actively discouraging them. Among the steps the UK is contemplating is doubling the number of visas for high-skilled foreign workers and a special free visa for a select group of highly accomplished global talent.

While these steps are in no way directed specifically at Indian talent working on H-1B visas in the US, it may be attractive to at least some of those Indians in STEM (science, technology, engineering, and mathematics) fields in the US who are now looking at other options. The steps being contemplated are not specifically for those who were earlier plan-

ning to apply for H-1B visas — it is also aimed at foreign researchers and others that the UK wants to woo for its own technology research.

Meanwhile, several other European countries — notably Germany, Portugal, and France — are taking steps to attract more of the world's top talent. Some Nordic countries are also trying to attract global talent in search of attractive shores. Many Asian countries are also reportedly exploring measures to make themselves more attractive to global technology and other talent.

And China, which has now become the US' biggest rival in areas of science and technology, including artificial intelligence (AI), quantum computing, and biotech, having earlier introduced targeted programmes to bring back Chinese talent from the US, is now going all out to attract global talent as well. The newly announced K visa, starting from today (October 1), is designed specifically to attract foreign tech talent, even though China already has strong domestic talent in cutting-edge areas of science and technology.

While the US H-1B visa hike to discourage global STEM talent is likely to ensure that a large number of highly skilled workers from India and other countries will now seek opportunities elsewhere, Indian policymakers seem oblivious to the fact that this will not automatically mean that the best Indian brains will flock back to the country. The government seems to be unaware that it needs to take concrete steps to make India a popular destination for global tech and other talent.

If the Indian government is indeed serious about reversing brain drain, it needs to put much more emphasis on research and innovation, especially in areas that will determine the future. India's spending on research — by the government, in univer-

sities as well as by big corporations — is abysmal. Opportunities and the ecosystem that support researcher-entrepreneurs are practically non-existent and need to be created from scratch. Special incentives, including monetary ones, should be put in place to attract top talent from abroad.

For a long time, the US remained a leader in technology and innovation because it created the perfect environment for global technology talent to flourish. It created conditions for immigrants to come to the country and build world-beating tech companies. Some of the more famous names who came to the US and flourished in areas such as chip design, AI, biotech, and genomic research are immigrants. Now that the US seems determined to actively discourage them, both new talent and some of the existing ones may look for opportunities elsewhere. India seems strangely slow in actively wooing them.

A caveat here: A large number of Indians who go on US H-1B visas would not qualify as top research talent but are taken for mid-level project execution and other operational roles. However, many who went on H-1B visas went on to head the biggest companies — Satya Nadella is one example. Also, a lot of Indian talent in the US (and at other top universities for science and technology students) went abroad to study but stayed back — Sundar Pichai was one of them.

Successive Indian governments have done little to attract the best minds from abroad or to ensure that the best minds in India stay and work towards developing the country. The fact that we have become the fifth-largest economy in the world is despite this. Yet, if we want to become a truly powerful global economic player, we cannot afford to ignore the race for global science and tech talent.

The author is former editor *Business Today* and *Businessworld*, and founder of ProsaicView, an editorial consultancy



OUR VIEW



# Move goods efficiently for a stronger economy

Inland freight movers have long over-relied on India's road networks but increased railway haulage offers an opportunity to lower costs, gain efficiency and contain carbon emissions

With global trade headwinds strengthening and India's government blowing the Swadeshi bugle to double down on domestic drivers of economic expansion, enduring competitiveness is vital to success beyond the near term. A lynchpin of this pursuit is logistical efficiency in terms of time and cost. What it costs to move cargo from one place to another—be it a factory, retail market or ship for export—can make a big difference. A recent cost assessment of logistics by the Centre reveals that while tough policy measures are being implemented to reduce this burden, we need actionable blueprints to reduce transport costs, which form the bulk of our logistic bills—with storage and warehousing, besides administrative and handling costs, making up the rest. Overland, road transport has an inherent advantage. It offers door-to-door connectivity, which makes it score over rail carriage for relatively short distances. As railway haulage requires first- and last-mile links, with much loading and unloading to be done, and also terminal handling, it can prove costly. For longer distances and specific cases, however, the sheer efficiency of moving freight by rail outweighs these costs. Rail is well suited for operators moving bulk material and consolidated cargo in large volumes. Coal, iron ore, cement and fertilizers together account for three-quarters of the goods hauled by rail. What about other goods? The commerce ministry's report spotlights one of our busiest long-haul routes, from Delhi to Mumbai, as a case study. The dominant mode over this 1,400km route remains road transport. Even though the Indian Railways charges less for the distance carted, expenses on

private vendors to take the goods onwards can be quite high. For a Delhi-Mumbai haul, for example, the cost doubles. This bill includes a premium paid to ensure timely delivery, which is critical to business but the Railways cannot always assure. On the other hand, the report states that Indian Railways accounts for just 7% of India's overall cost of logistics. Road transport accounts for 42%, warehousing 25%, and moving goods around warehouses, about 15%. If we look at freight traffic, the Railways has a 29% share. Within itself, this network is cost effective. So, if other costs are lowered, the Railways could gain market share and also help reduce the country's logistical costs. No doubt, measures are afoot to align India's logistical infrastructure with the needs of industry and reduce transit time. As part of the National Rail Plan, the Railways has set itself the target of a 45% share of freight traffic by 2030. To compete effectively with trucks, as the report points out, clients need end-to-end solutions. For this, the Railways could create an ecosystem for private operators to compete on low-cost services that include rail haulage and also offer predictability, accountability and timely delivery. This would not only give us a robust multi-modal transport system, it would also reduce the country's carbon emissions, since locomotives are fast going electric while trucks mostly continue to emit the same old fumes as they trundle along. With rail electrification in progress, the cleaner our electricity grid gets, the greater will be the broad benefits of stepped up rail usage. An effective Railways plan could boost the emerging use of electric and LNG trucks too. With a more vibrant market for cargo services, we would all benefit from lower prices for faster and more reliable deliveries.



are, respectively, director, IIM Udaipur, and managing director and CEO of People Research on India's Consumer Economy.

India's bilateral trade with the US reached \$132 billion in 2024-25. In just five months of 2025-26, India notched up about half of last year's number. That momentum now faces disruption: Washington currently has a 50% extra tariff on imports of Indian goods after the rate was doubled in late August. The question is not only whether this will benefit the US economy, but also how it will reshape India's trade strategies and the global system. To evaluate the consequences, it is useful to revisit America's most infamous protectionist experiment: the Smoot-Hawley Tariff Act (SHT) of 1930. While different in design, the comparison highlights the risk of escalating tariff wars. The SHT was a blanket hike that raised duties on over 20,000 imports, with average rates on dutiable goods climbing to about 60%. Though originally justified as relief for farmers, lobbying quickly expanded its coverage to manufactured items. The result was swift retaliation by US trade partners, leading to a collapse in global commerce. Between 1929 and 1934,

world trade fell by nearly two-thirds, worsening the Great Depression. While not its sole cause, the SHT intensified that economic crisis by shrinking demand and worsening financial contagion. The 2025 tariffs are more finely targeted. They are country- and product-specific, framed as a negotiating tool to push partners towards reciprocity. Still, there is a danger of prolonged tariffs and retaliation reducing global demand and fragmenting supply chains in ways reminiscent of the 1930s. Firms rushed shipments into the US earlier this year, temporarily cushioning the shock. But economists warn that trade volumes in late 2025 and into 2026 will decline. The World Bank has cut its forecast for global growth, predicting the weakest expansion (barring recession years) since 2008. Indian policymakers are reportedly weighing retaliatory tariffs, complaints filed at the World Trade Organization (WTO) and a diversification of export markets to Southeast Asia, Africa and West Asia. Such adjustments may ease immediate pressure while giving India's trade networks long-term resilience. But the US is a key market for sectors like textiles, pharmaceuticals and IT services. So, any prolonged barrier would prove costly for Indian exporters.

In America, with a record corn harvest expected in 2025, farmers are staring at a painful season as they struggle to access the Indian market and face the strain of tariff disputes with China. As export channels close, competitors from Latin America and Africa are stepping in to fill orders once supplied by US farms. Even if tensions ease later, lost market share may not be easily regained. For India, this presents an opportunity to strengthen agricultural ties with alternative suppliers, reducing reliance on US imports. In the US, supporters of 'reciprocal tariffs' stress the regime's fiscal benefits. The Penn Wharton Budget Model projects around \$5.2 trillion in additional revenue over the next decade. On paper, this revenue could reduce America's debt-to-GDP ratio. Yet, such estimates assume stable trade volumes. If US imports shrink significantly, collections will fall short, weakening the fiscal argument. Meanwhile, US consumers and firms share the burden of higher import prices, eroding

their real purchasing power and hurting growth. Interest-rate cuts by the US Federal Reserve offer some cushion, but these cannot cancel the arithmetic of costlier imports. There are also financial-market implications. Reduced imports mean fewer dollars flowing abroad, weakening demand for US Treasury bonds. This could tighten credit conditions and nudge the dollar lower. While a weaker currency benefits some exporters, it also raises the cost of imported inputs. Uncertainty over Washington's policy direction further complicates long-term investment. The US has traditionally backed stable trade rules, but abrupt changes now discourage capital spending and supply-chain commitments. History provides sobering lessons. The SHT stayed intact until 1934, when the US Congress passed the Reciprocal Trade Agreements Act, enabling gradual tariff reductions. After World War II, multilateral frameworks like the General Agreement on Tariffs and Trade institutionalized open-

ness, helping restore growth. But it took years to rebuild trust and repair supply chains. The message is clear: a course reversal may eventually take place, but the damage to relationships and trade flows can linger long after tariffs are lifted. What then are the options? For the US, a pragmatic path would involve a phased roll-back of tariffs, sectoral exemptions where domestic producers face minimal competition and reliance on multilateral dispute-resolution forums to settle differences. For India, expanding trade partnerships with Asean, Brics and Africa can cushion the blow, while continued engagement with the US may keep the doors open for eventual reconciliation. Both sides must recognize that protectionism rarely delivers lasting prosperity—it often redistributes costs rather than solving structural problems. The lesson from 1930 is not that all tariffs are catastrophic, but that poorly calibrated measures can spiral into systemic harm. The stakes are substantial. Both India and the US should aim for rational and sustainable policies that preserve fiscal discipline without hurting global trade. If not, the world may again discover how quickly well-intended tariffs can reshape the global economy—this time with India at the heart of the story.

THEIR VIEW

# The AI stack will test America's infotech partnership with India

Cooperation in artificial intelligence is vital for both countries to shape a tech-determined future



**VIVIAN SHARAN** is a policy expert at Koan Advisory Group.

US President Donald Trump's H-1B visa restrictions could hobble both the Indian and American technology industries, which are in the midst of an artificial intelligence (AI)-led disruption. The regime creates a \$100,000 entry barrier for each new foreign worker in information technology (IT) services and distorts the American labour market, which otherwise benefits from a talent mop-up that is the envy of the world. Hopes for course correction lie in a substantive trade deal, but this will not materialize overnight. Meanwhile, the two countries must recognize that AI is narrowing the window to turn their IT ties into a lasting strategic advantage. The US is the largest market for Indian IT service exports and India is the fastest-growing digital market for American technology companies. Together, they form the backbone of the global services economy, which now defines competitiveness even in goods markets. A phone or a car today is judged as much by its software and design as by its physical components. AI applications depend on continuous human mediation and their success rests on trust. This is why the US-India services relationship has endured. American firms rely on Indian IT providers because of their service ethic and talent base. India, in turn, depends on US digital infrastructure like its cloud

platforms as the rails of its digital economy. This reciprocal confidence is the quiet but powerful engine of the partnership and it stands in sharp contrast with the goods markets, where both are far more reliant on China. AI makes preserving the legacy of trust even more important. The next wave of AI adoption will come from local and sector-specific applications adapted to cultural, linguistic and design contexts across key sectors like health, finance and education. Silicon Valley and Wall Street may invest trillions in AI infrastructure, but its commercial viability will depend on deployment, much of which will be tailored and overseen by Indian engineers. Despite complementarities, policy confusion threatens progress. In Washington, impulses swing between protecting a technological advantage over China and appeasing domestic lobbies through regressive immigration reforms. Although Trump lifted a Biden-era order that restricted exports of AI chips to India, the spectre of export curbs aimed primarily at Beijing results in some uncertainty for us too. In India, our instinct is to regulate first and ask questions later. Motivated by a hawkish approach to digital anti-trust in Europe, as also by undercooked domestic discussions on digital sovereignty, our policymakers are exploring stricter regulation of foreign-owned digital infrastructure and applications. Both jurisdictions may be making the same error: equating progress with a need for restrictions. True sovereignty rests on capability. Snapping global ties will only weaken their ability to compete with the Big Tech actors they worry about most. AI crystallizes these policy dilemmas because it straddles economics, security and governance. Economically, it promises trillions in value creation, but only for countries able to leverage a combination of technology and talent across the stack of AI applications and infrastructure. AI will shape the security

environment via military competition, cybersecurity cooperation and information wars. In governance, technical and institutional alignment will determine whether societies trust the technology. Technical standards are a natural starting point for cooperation. Many transnational cloud services that provide the bedrock for AI applications already follow advanced standards for access control, cybersecurity and data protection. If Washington and New Delhi formalize a common approach to the sovereignty of cloud data by mandating the use of such internationally accepted standards, they can safeguard citizens while using common infrastructure for AI. Both countries also need greater institutional cooperation. Policymakers often espouse new regulatory doctrines, such as for digital antitrust or visas, without sufficient data on the harm it can cause markets or consumers. Collaborative research on the development and deployment of emerging technologies would allow both governments to ground policy in evidence. Finally, the two must mould a culture of scientific cooperation through academic-industry partnerships and mobility programmes that can deepen trust while accelerating innovation. Just as space and energy cooperation once created a culture of collaboration with Moscow, AI offers us a chance to create a success story in a new domain that will shape the global balance of power. India's quick leap from headline phone scarcity to becoming the world's largest consumer of mobile data shows our ability to adopt technologies at scale. The US has built an unmatched ecosystem for entrepreneurship and risk-taking. The two democracies must move beyond defensive postures and embrace their interdependence as a source of strength. If they succeed, they will secure their economic future and get to write the rules of the global digital economy. If they fail, that task would be left to others. The AI stack is the litmus test.



**JUST A THOUGHT**

As we learned after President Herbert Hoover signed the Smoot-Hawley tariff at the outset of the Great Depression, vibrant international trade is a key component to economic recovery; hindering trade is a recipe for disaster.

**ASA HUTCHINSON**

# Trump tariffs: What the echoes of Smoot-Hawley tell us

ASHOK BANERJEE & RAJESH SHUKLA







# THE IDEAS PAGE

## Census must count sub-caste in

India's first fully digital census offers opportunities for sophisticated metadata analysis. These technological capabilities will be wasted if data collection remains conceptually limited to expansive categories



MANISH TEWARI

THE CONSTITUENT ASSEMBLY pledged to transform an ancient civilisation into a modern nation-state predicated upon justice — social, economic and political — through equality of status and opportunity. This fundamental framework envisioned political, economic and social empowerment for historically disadvantaged social groups through specific constitutional interventions.

Articles 15 and 16 gave the state the right to promulgate laws for the advancement of socially and educationally backward classes including the Scheduled Castes and Scheduled Tribes. Article 17 abolished untouchability, Article 23 prohibited human trafficking and forced labour, and Article 24 banned child labour, alongside constitutional prohibitions against discrimination based on caste, religion, race, sex and place of birth.

The 1990 notification by the Centre implemented the recommendations of the Mandal Commission providing for 27 per cent reservation for Other Backward Classes (OBCs) in public employment. It expanded the canvas of the affirmative action framework beyond the SC/ST communities.

The Supreme Court decision in *Indra Sawhney vs Union of India* upheld OBC reservation. It also established the 50 per cent ceiling and introduced the “creamy layer” concept to ensure that the benefits of affirmative action vertically reached the genuinely disadvantaged sections.

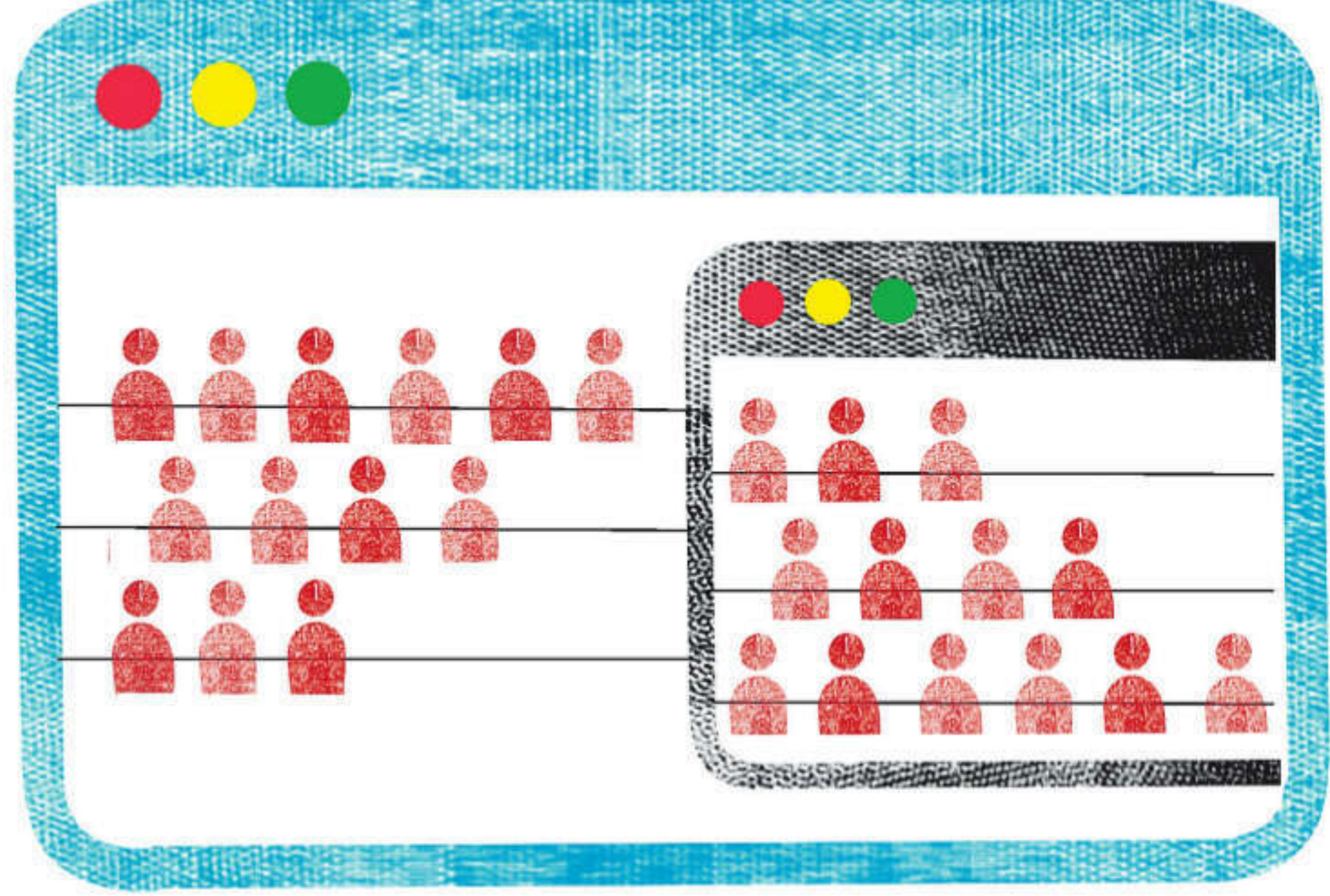
In 2019, an additional 10 per cent reservation on an economic criterion was granted to the economically weaker sections of the unreserved category by the Constitution (103rd Amendment) Act, taking the total reservation up to 59.5 per cent. The jurisprudence of social justice juxtaposed class with caste in the Indian context.

The April 30 decision of the Union government to include caste enumeration in the forthcoming 2027 Census is a belated step, coming as it does after repeated exhortations by the Opposition, and nearly a century after the last comprehensive caste census of 1931 and 14 years after the Socio-Economic and Caste Census (SECC) of 2011.

It represents an opportunity to create an evidence-based framework for affirmative action paradigms. Oxymoronically, the mere enumeration of a broad swathe of caste categories without granular data on sub-caste and other lineage markers, namely gotras and their regional equivalents, dovetailed into detailed economic indicators would not provide the combination of X-ray, MRI and CT scan of Indian society that is imperative for focused and targeted interventions.

This is necessary for Census 2027 to transcend mere political symbolism and achieve substantive utility for policy-making.

The historical precedent for such detailed enumeration exists because even the British colonial administration recognised, for its own administrative control and revenue purposes, that India's social system could not be understood through broad sweep categorisations alone. The 1931 caste census, the last comprehensive effort of its



CR Sasikumar

kind, documented some 4,147 distinct castes, sub-castes, and lineage markers, a significant increase from the 1,646 recorded just three decades earlier in 1901.

The integrity concerns that plagued the 2011 SECC offer instructive lessons for the upcoming census. The NDA/BJP government's argument for not releasing the 2011 SECC data revolved around methodological flaws and data integrity issues. The government's claim that the data proved unwieldy due to millions of Indians identifying with their community, sub-caste and lineage affiliations rather than by the broader SECC categories underscores the anthropological reality that sub-caste identities are still socially salient despite attempted administrative erasure.

When respondents provided what officials deemed to be 46.7 lakh caste entries and over 8 crore errors, they were not providing erroneous data but rather reflecting the complex ground reality of caste identity that cannot be squeezed into generic categories. Without capturing sub-caste and lineage details, Census 2027 would fail to reflect the intricate social stratification that defines caste-based disadvantage.

Within the broad rubric of various forward castes, Other Backward Classes (OBCs) and even Scheduled Castes and Tribes, are a myriad of sub communities with vastly different historical experiences, occupational patterns and contemporary status. The Justice Rohini Commission's findings that just 25 per cent of OBC sub-castes received 97 per cent of reservation benefits demonstrates how aggregate data can mask internal inequalities and perpetuate advantage in privileged segments of upwardly mobile and energetic social groups within a caste category. In the absence of thorough documentation of these subdivisions, policy interventions may inadvertently favour the politically dominant and socially articulate sub-groups within larger categories, thereby reinforcing internal hierarchies.

Gotras and lineage markers matter precisely because they often correlate with social

capital, network strength, and economic opportunity. In rural India especially, kinship networks determined by gotra influence land ownership patterns, political representation and even access to resources.

The collection of caste data, if divorced from comprehensive economic profiling, represents an exercise in abstraction that cannot serve the needs of evidence-based policy formulation. Caste identity and economic status intersect in complex ways that demand a nuanced understanding, not merely a political headline.

The proposed household questions for the census, covering amenities, assets, consumption patterns, occupation, etc. would provide the kind of granular data that can then be crystallised through big data analytics to understand these intersections, but only if they are collected concurrently and linked directly to information about caste, sub-caste and lineage markers.

The government's aspiration to conduct India's first fully digital census creates unprecedented opportunities for sophisticated metadata analysis. However, these technological capabilities will be wasted if the data collection itself remains conceptually limited to expansive categories. Sophisticated digital infrastructure should be deployed in service of understanding India's social complexity, not simplifying it out of existence.

What is required is the political and administrative will to design a census that actually reflects the society it intends to measure — one that recognises that disadvantage operates at the intersection of caste/sub-caste identity, economic deprivation, and kinship.

Only then can we hope to frame interventions that match the complexity of the problems that need to be addressed. Census 2027 must aspire to be more than a counting and accounting exercise. It has the potential to become a transformative tool of social justice.

The writer is a lawyer, third-term MP, and former I&B minister. Views are personal

## WHAT THE OTHERS SAY

“The [Labour] party's ideological centre of gravity is shifting — away from liberal universalism and towards transactional belonging. But it is a step backwards for Labour to only offer belonging to those who pass a morality test rather than one that guarantees rights as a matter of principle.” — THE GUARDIAN

## Relying on ourselves

Private sector can help reduce India's dependence on import of natural resources



ANIL AGARWAL

THE ROAD TO Viksit Bharat by 2047 includes a destination we must reach much sooner. And that is Atmanirbhar Bharat. No nation has become strong by being dependent on imports. The government is aware of this and the Prime Minister's call for self-reliance and *swadeshi* are very timely. If we look at India's imports, 50 per cent are on account of the natural resources sector — oil, gold, copper, bauxite and many others. Electronics are also a big component, but 15 per cent of total imports. The government has made a huge, successful push in that sector with increased production domestically. It is time to recognise that Atmanirbhar Bharat must involve raising domestic production in the natural resources sector as well.

Fortunately, India has tremendous geological resources, second to none. Its geology is comparable to Australia, Africa and South America. Millions of years ago, these geographies were part of the same landmass, and all share an excellent endowment of minerals and hydrocarbons. The only difference is that the other geographies have explored and discovered their potential. We have yet to do so.

Given our geology and deposits, there is no reason India should import any natural resources. It is unfortunate that India is highly import-dependent on three critical resources — oil, gold and copper, which together constitute 60 per cent of the total resource imports. We import around 90 per cent of our oil requirement, 95 per cent of our copper requirement and over 99 per cent of our gold requirement. India also imports coal and bauxite, where imports should be zero.

Just four policy measures can completely change the scenario: A new way of exploration, self-certification of clearances, rejuvenation of existing assets and a level playing field between public and private sector.

First, there must be a focus on exploration. Globally, exploration is carried out by small exploration companies that function more like start-ups than large companies. They take the high risk involved in exploration — nine out of 10 bets may fail — but they survive by monetising that one discovery. In India's current policy regime, which is tied to auc-

tions, this system doesn't work. Largely, it is the government that does baseline explorations, but its two exploration companies do not have the bandwidth or resources to aggressively explore all over the country. Let us trust our young entrepreneurs to do this task. Just free exploration. The government will, in any case, charge royalties and taxes, which will take care of its revenue requirements.

Second, processes must be expedited. It takes several years in most places in the world to move from exploration to mining. In India, it takes longer because of the number of clearances involved and the long time taken to grant those clearances. Instead of a complex system like this, we should move to self-certification. The government can create a rulebook of norms and standards that must be adhered to. Entrepreneurs must self-certify. Later, via an audit process, the government can hold them accountable for any lapse. In fact, the government already uses this system effectively in some domains, like income tax.

Third, revive and give new energy to existing assets that are either lying dormant or are underperforming. The government owns a big majority of existing assets in oil, copper and gold. Many of these are dormant, like Kolar Gold Fields. Some have been underproducing for decades, like Hindustan Copper in copper or Hutti Gold Mine. Others are awaiting big-ticket investments like in oil. These can be opened up for private sector participation. Fresh investment and the latest technology will yield immediate results unlike the results from fresh exploration, which will take time even with the fastest clearances.

Fourth, level the playing field between public and private sectors. The natural resources sector is still dominated by large public sector companies, which are often given preferential treatment either via fiscal support or allocation of blocks through the nomination route. This puts the private sector at a disadvantage when it comes to reaching the same level. To encourage entrepreneurship, particularly for young entrepreneurs to enter this space, there should be no discrimination.

None of these measures requires any support from the government's budget. In fact, they will enhance revenue for the government. They are all aligned with the goal of transparency. Most of all, they will help reduce imports in a substantial way. The increased domestic production will create millions of jobs and support the livelihoods of many. The natural resources sector can, and will, make a big contribution to the making of Viksit Bharat by 2047.

The author is chairman, Vedanta Group

## LETTERS TO THE EDITOR

### BITTER PILL

THIS REFERS TO the editorial, 'The new tariff' (*IE*, September 30). United States President Donald Trump's decision to levy 100 per cent tariffs on branded pharmaceuticals has both an upside and a downside. On the one hand, it might nudge global pharmaceutical firms to localise production, reducing supply chain risk and creating jobs in the US. On the other, it risks disrupting access to affordable medicines. Policymakers must push for clearer rules and a fair transition. India's strategy must emphasise careful entry into higher-value pharmaceutical segments while closely monitoring US classification.

SS Paul, Nadia

Kamal Laddha, Bengaluru

THIS REFERS TO the editorial, 'The new tariffs' (*IE*, September 30). The recent US tariff hike on branded and patented pharmaceuticals under Section 232 of the Trade Expansion Act poses a serious challenge to India's \$25-billion pharma export industry. With the United States alone absorbing nearly 40 per cent of our exports, the fall in Nifty Pharma and stocks such as Sun Pharma and Biocon reflects deep market anxieties. India cannot afford to remain reactive. Diversifying to emerging markets in Africa, Latin America, and Southeast Asia, while expediting FTAs with the EU and the UK, is imperative. At home, incentivising R&D, reducing regulatory delays, and boosting generic competitiveness can mitigate long-term risks.

Muskan, Patiala

### MANMADE TRAGEDY

THIS REFERS TO the editorial, 'A superstar's failure' (*IE*, September 29). The tragedy that befell actor-politician Vijay's rally at Karur illustrates that, in this country, we do not learn the lessons tragedies

try to teach us. We make routine passion-ate pledges to improve crowd control measures after every deadly stampede at cramped places, but fail to match it with action. Stampedes occurring frequently are not just isolated incidents; they are the result of our deep-rooted systematic and behavioural flaws that leave us gasping when a fresh one strikes us. At Karur, the actor's much-delayed arrival at the congested venue, coupled with rumour-fuelled panic among the surging audience, caused an all-out frenzy. Unless we as a community change our mentality, tamp down our instincts for hero worship, and cooperate for orderly movement at mass gatherings, even the best crowd management measures are bound to fail.

Kamal Laddha, Bengaluru

THIS REFERS TO the editorial, 'A superstar's failure' (*IE*, September 29). The tragic loss of 39 innocent lives in Karur, Tamil Nadu during the TVK political rally addressed by actor Vijay is a man-made disaster. Prima facie, it appears that there was no effective crowd management at the venue. Even crowd control, which is a sub-process of crowd management, seems to have been grossly ineffective. Had the organisers and law enforcement agencies followed protocol, the disaster could have been averted or damage minimised. The tragedy reeks of criminal negligence.

LR Murmu, New Delhi

### CUT THE RATE

THIS REFERS TO the article 'Slice the repo rate' (*IE*, September 29). It is both timely and nuanced. With Q2 GDP likely to hover near 7 per cent, IIP and PMI readings pointing to steady manufacturing gains, and headline CPI easing, India can afford a calibrated rate cut.

Abhinav Shah, Lucknow



ROHAN MANOJ

THE WELSH DRAGON isn't a particularly fearsome beast as dragons go. I have one on my new keychain and a rather goofy-looking one has just made his lair on my fridge door, guarding the precious hoard within. The symbol is associated with Welsh nationalism, but the latter has largely been an inclusive, civic nationalism that seeks greater autonomy in governance and cultural recognition, not fire-breathing ethnonationalism. So, when Welsh flags started popping up all over the place during my visit to the UK in September, flying from lampposts and all manner of buildings as we drove past, nobody thought anything of it at first. My mother wondered if the local football club, which is seeing a meteoric rise, had won a match. Later, we learnt that these had been put up as part of a campaign linked to the anti-immigration protests taking place across the UK.

Apparently, it's about patriotism. Even the Prime Minister has felt the need to talk about his fondness for flags. That's quite a turnaround — when I was growing up, aggressive flag-waving was considered a distinctly un-British way of showing one's patriotism. Worse, it was seen as American. Now, the flags are everywhere; they're calling it Operation Raise the Colours. Those behind it are going about it in quite a clever way by encouraging the use of the flags of all four constituent countries of the UK — England, Wales, Scotland and Northern Ireland — and even the Union Flag. Until now, it was usually

the English flag — the St George's Cross, red on white — that the far right tried to appropriate, with some success in imparting negative associations to it. Now, White nationalism has tailored itself to the regions, just as those regions have become more fertile ground for such sentiments with rising immigration in recent years. It was easy to avoid ugly ethnonationalism and promote a more inclusive vision in Scotland, for example, when it was largely monoethnic.

Is everyone involved in the flag-planting and the protests a White nationalist? Let's take an example given by Clive Lewis, a Labour MP who happens to be mixed-race. In a post on X, he wrote about an “old school friend” who participated in a major protest in London. The friend, an electrician who Lewis described as “smart” and “not racist”, gave two reasons for going on the march: “The government doesn't listen to us” and “I want to feel proud of my country again”. He “believes [Reform UK leader Nigel] Farage would be a disaster” if he got into power, and admits there were a lot of “a\*\*holes” on the march — but he himself still went because he wanted to “feel part of something bigger”. And he “wore a Union Jack, not a St George's Cross as he said that one had been hijacked by racists”.

Lewis calls his friend a “bundle of contradictions” but goes on to give a sympathetic analysis, talking about the hollowing of national life as a result of atomisation and of institutions — from the BBC to the railways, the

post office and the National Health Service (NHS) — being underfunded and undermined. He cites Karl Polanyi's *The Great Transformation* on how society pushes back when markets are “disembodied” from society, and how “the backlash can turn authoritarian” when “democracies fail to provide a humane alternative”.

Many in Britain have written of a sense of national decline, especially since the global financial crisis of 2008, of stagnant wages and a rising cost of living, a less and less functional state, a paralysed NHS and other decaying institutions, and even children's height in a particular area being affected by poorer nutrition and healthcare. Drawing a straight line from all this to immigration is trickier. Arguments have been made about the persistent failures of immigration policy — of the strain on housing and public services, of large numbers of migrants creating ethnic enclaves and failing to integrate and imbibe “British values”, of the government's apparent inability to reduce the numbers of asylum seekers arriving in small boats and missteps in dealing with them after they arrive. None of that ought to be excused, but it equally does not make immigration the sole, or even the major, cause of the structural problems that are ultimately behind this wave of public anger. Why, then, has it become a lightning rod for all kinds of grievances?

The blame lies with a media ecosystem that has been whipping up hysteria over im-

migration for decades, and of the failure of the political class to counter it, calm the public's fears or come up with sane policies to address the real problems. Instead, we got performative cruelty as exemplified by then home secretary Theresa May's “hostile environment” policy, which led to the harassment of migrants, fostered xenophobia and eventually led to the Windrush scandal, in which Commonwealth citizens with the right to remain in the UK were detained and faced the threat of deportation. Then as now, Labour politicians have tried and failed — former party leader and current energy secretary Ed Miliband's “controls on immigration” mug from the 2015 election soon ascended to memehood — to ride the wave of what they believed was irresistible public sentiment.

Coming back to Lewis's friend, he and many other marchers may not, personally, be racists. But that does not change what these protests are, who is behind them, or what they lead to. As was the case with the protests-cum-riots last year, violence will ensue and has done so, racism will be further normalised and many people will live in an ever-worsening climate of fear, in which they could be physically assaulted at any moment. The government is happy to acknowledge the “legitimate concerns” of the protesters — who is there to address the legitimate fears of immigrants and non-White people?

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# Time to turn the corner

Trump’s policies remind Indian drug firms of the need to re-strategise

**B**Y IMPOSING A prohibitive 100% tariff on imports of “branded” and patented medicines, US President Donald Trump wants to force all suppliers of high-value proprietary medicines in the US to make them locally. He also wants home-grown elements of Big Pharma to shun offshoring of pharmaceutical manufacturing and research. However, the stratospheric tariff is unlikely to help him meet the chief goal of gaining control over the global supply chains of medicines. Businesses rarely accept models forced on them; rather they find ways to bypass such hurdles, and grow autonomously. Global drug research and the business of manufacturing new drugs have already seen a fair amount of diversification in recent years, with China emerging as a key destination. Also, the conventional Big Pharma of the West is turning risk-averse. New blockbuster drugs aren’t hitting the market as frequently as the existing ones losing patent cover.

Indian companies have a 40% share in the US generics market by volume, while they account for just 1.3% by value. That shows how “valuable” the high-quality Indian generic medicines are to the US consumers, when it comes to curbing healthcare costs. India has nearly 500 manufacturing units approved by the US Food and Drug Administration, second only to the number of such units in the US itself (530). Given all this, the country’s generic drugs business is largely immune to the hefty US tariff. In fact, even a 30-80% cut in prices of prescription drugs announced by Trump in May did not require Indian firms to cut their prices much.

Nevertheless, the tariff may still have an impact on many of them, considering the varying nature of their business models. Apart from direct generic exports to the US, several of them have another channel to access that market, as contract manufacturers for suppliers of branded/patented medicines. Indian-made drugs reach the US market with labels belonging to firms based in the European Union (EU), Latin America, and elsewhere. Some of the larger Indian companies like Sun Pharma, Cipla, Dr Reddy’s, Lupin, and Biocon already have operational plants in the US, but they may still have to shift the entire production base for US supplies to that country to fully circumvent the 100% tariff. Ambiguity over the definition of branding could also prove to be a headache.

That said, Trump’s policies may serve as a blessing in disguise for the domestic drug-makers, by shaking them out of complacency. The immediate strategy must include acquiring a greater share from China in the manufacturing of newly launched drugs, and expanding the branded drugs business in various export markets. A great deal of value usurped by the brand owners and monopolistic drug distributors in the global markets could accrue to Indian firms, with reasonable levels of additional investments. Though fundamental drug research is still a tall order for India, at least a handful of companies which have developed a critical mass of R&D would do well to explore this area. What awaits them is rich rewards from international patenting of their discoveries, in therapeutic areas where domestic and global market potentials converge. A revamped strategy is all the more important, especially because the public interest safeguards and anti-evergreening provisions in India’s Patent Act, which have over the last two decades stood domestic industry in good stead, are being undermined under bilateral free trade pacts, with major partners like the UK, European Free Trade Association, EU, and even the US.

# War on H1-Bs has a new front, bipartisan support

**I**N A ONE-TWO punch at employers, the Trump administration is following up its hefty \$100,000 skilled visa fee with Project Firewall, an aggressive new immigration enforcement programme. It is being billed as a sweeping effort to root out abuse of the H-1B visa programme by some of America’s largest employers.

It’s rare for the federal government to systematically target companies for immigration enforcement; usually, any consequences fall on immigrant workers, not their employers. The initiative shows the depth of President Trump’s intention to curb all forms of immigration. It could also, politically speaking, reestablish his populist bona fides. Voters under 30 continue to worry about the economy. Some of the young male voters so critical to Trump’s 2024 victory are drifting away. Trump’s signature legislative achievement, a mix of tax cuts and benefit cuts called the “One Big Beautiful Bill Act”, remains unpopular.

Trump needs to regain some of that lost ground to retain Republican Congressional majorities in the mid-terms. Casting corporations as villains depriving skilled American workers of six-figure jobs by hiring foreigners—H-1B workers have a median wage of \$108,000—neatly fits his persona as a hero for “forgotten men and women”.

Yet it remains to be seen how vigorously the administration will go after companies that employ hundreds of thousands of foreign workers through various temporary visa programmes. Trump has a complex relationship with the business community. He has invited billionaires and tech titans to dine with him at Mar-a-Lago and attend his inauguration, but has also feuded and fallen out with some. And the largest corporations will have armies of lawyers ready to challenge any bids to rein in H-1B visas.

But that’s a fight Trump is bound to relish. No president has ever launched a programme quite like Firewall, which the Labor Department said could be “the first time the federal government has sought to broadly enforce H-1B legal standards” in the programme’s 35-year history. Until now, suspected non-compliance has been largely based on worker complaints, investigated on a case-by-case basis.

Labour secretary Lori Chavez-DeRemer, who will lead the project, said she will personally certify investigations, which will draw on data and resources from agencies, including the Justice Department, US Citizenship and Immigration Services, and others. The goal is to “end practices that leave Americans in the dust”. Eliminating fraud and abuse, she said, “will ensure that highly skilled jobs go to Americans first”. An online ad campaign has already begun, with Labor Department posts that say “End H-1B abuse. Hire American”, and feature a picture of Trump saluting.

This issue does not fall along strict party lines. Labour leaders have complained for years that the programme was being used not to hire uniquely talented workers from abroad, but to obtain cheaper foreign labor that suppresses wages, particularly in tech. In 2015, hundreds of American tech workers at Disney and other companies found themselves not just laid off but expected to train the foreign workers hired to replace them. In 2021, an Economic Policy Institute report found evidence of widespread wage theft, with thousands of H-1B subcontractors at companies such as Disney, FedEx, Google, and others underpaying by some \$95 million. The Labor Department “has done virtually nothing to ensure program integrity by enforcing the wage rules”, the report said. It recommended, ironically, that the feds conduct “a sweeping investigation into whether companies are systematically underpaying H-1B workers in violation of the law”, with heavy fines for violators and closure of existing loopholes.

Democrats have wasted little time boarding the H-1B reform train. On Wednesday last week, Illinois Democratic Senator Dick Durbin, the ranking member on the Judiciary Committee, teamed with Judiciary Chairman Senator Chuck Grassley of Iowa in firing off letters to Amazon and other users of H-1B users, inquiring why they hired H-1B workers while cutting other jobs.

Should Trump succeed in opening more high-paying jobs to younger American workers, the payoff could be big. But corporations may also think they can just ride out the storm, perhaps betting he will lose interest. They could try to fight Trump to a legal draw, or risk his wrath and offshore more jobs. Trump is a disruptor by nature. He favours big, bold strokes and high drama—but often moves on quickly to the next issue. Wearing corporations off foreign workers will take persistence.



**BULLISH PHARMA**  
Union minister of state Jitendra Singh

India’s domestic pharma market is \$60 billion, but is expected to double, that is \$130 billion, by 2030

## STRATEGIC CONTRAST

TRUMPONOMICS IS NOTHING LIKE CHINA’S COMPREHENSIVE ‘ALL-OF-GOVERNMENT’ APPROACH

# China plans, America reacts

**STEPHEN S ROACH**

Faculty member at Yale University and former chairman of Morgan Stanley Asia



11th (2006-10) and 12th plans (2011-15) laid the groundwork for China’s consumer-led rebalancing strategy, an unfinished agenda item that many hope will be refined in the upcoming 15th plan (2026-30).

By contrast, America abhors planning. The “invisible hand” of the market, not government targets and directives, allocates the country’s scarce resources. In theory, monetary and fiscal policymakers can guide and intervene in the US economy, aided by the interplay between executive and congressional authority over federal budgeting. But in practice, that process has all but broken down under intensifying political polarisation.

Over the past three decades, partisan battles over spending cuts (in the Clinton era), health care (Obama era), and the border wall (in Trump’s first term) have caused a series of government shutdowns. Now, another fight looms over the One Big Beautiful Bill Act’s spending cuts and the trillions of dollars its tax cuts will add to the deficit.

Industrial policy blurs the distinction between Chinese-style central planning and the invisible hand. In China, industrial policy is a logical extension of long-term goal setting and has recently included the Made in China 2025 programme, the Internet Plus Action Plan, the New Generation Artificial Intelligence Development Plan, and the recent AI Plus Plan. In comparison, US industrial policy is reactive—addressing other countries’ supposedly

unfair competitive practices in sectors that American politicians judge to be of paramount importance.

Trump’s own deal-driven, transactional strain of industrial policy has prompted many to ask whether he has become a state capitalist. After all, he has intervened in support of Intel, US Steel, and the rare-earth firm MP Materials; negotiated a cut from Nvidia and AMD’s chip

sales to China; and established sweetheart tariff exemptions for Apple and TSMC. In some ways, these initiatives are a sequel to his predecessor Joe Biden’s industrial policies, which included direct support for infrastructure, semiconductors, and green-energy technologies. But Trump’s approach is less strategic and more about direct intrusion into company-specific decision-making.

Trump and Biden were not the first US presidents to embrace industrial policy. In 1961, a month after the Soviet Union completed the first manned space flight, John F Kennedy famously set the goal of landing a man on the Moon by the end of the decade, which America did. And the US Defense Department established the Defense Advanced Research Projects Agency as an internal industrial-policy mechanism to support frontier research that led to transformative technologies, including the internet, semiconductors, nuclear power, advanced materials, and GPS navigation.

China and the US are hardly alone in relying on industrial policy. After World War II, Japan embraced the model of a “plan-rational developmental state”. France embraced indicative planning, and West Germany’s Wirtschaftswunder was fuelled in part by industrial policy aimed at supporting small and medium-size enterprises.

But the West’s actions, including Japan’s earlier industrial policies, cannot compare to China’s strategic, comprehensive “all-of-government” approach, which is in a league of its own. The Chinese government draws on the country’s surplus domestic saving to target industries of the future, while marshalling the full resources of the NDRC, state-owned enterprises, state-directed banks, and state-supported investment funds.

Trump’s transactional interventions not only lack an overarching strategy; their scope will be limited by a US economy that is short on domestic savings, increasingly saddled with big, ugly federal budget deficits. Moreover, amid a full-blown outbreak of Sinophobia, there is strong bipartisan distaste for anything resembling Chinese-style market-based socialism.

For all the talk of America entering a new golden age, Trumponomics will ultimately do little to address long-term US competitiveness. In fact, the administration’s proposed funding cuts for basic research risk squandering US innovation capabilities.

Trump’s approach to governance—which favours policymaking through executive order, rather than legislative means—reflects an authoritarian strain of executive overreach that recalls the chaotic five-year plans of the Mao era. Just as those missteps led to China’s Cultural Revolution, many (including me) have argued that there may be reason to fear comparable turmoil in the US.

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# Strategic need to raise oil output



**N CHANDRA MOHAN**

The writer is an economics and business commentator based in New Delhi

At a time of relentless US pressure to reduce dependence on Russian oil and uncertain global energy prices, India must go all in to increase relative self-sufficiency

**THESE ARE CHALLENGING** times for India’s energy security with relentless pressure from the US to reduce its purchases of deeply discounted Russian oil if the bilateral trade deal is to go through. Punitive tariffs of 50% will remain amid indications that our dependence on Russian oil might attract even higher duties. India’s reliance on imports for its oil requirement, which is as high as 88%, faces geopolitical risks. To bolster its energy security, India must make determined efforts to boost domestic oil output that has been steadily declining. This has been falling for various reasons including low investment due to obstructive regulations, high taxation, and declining output from mature fields. India also lacks the technological capability for deep-water exploration.

Discontinuing such purchases from Moscow, no doubt, will impact India’s external accounts as they met 36% of its requirements of 5 million barrels of oil a day since 2023. Due to these cheaper supplies, India’s oil import bill declined year-on-year by 17% to \$50.4 billion this fiscal till August. But there are nascent signs of change with India seeking to balance between Russian oil and reliable West Asian supplies to ensure security and avoid overexposure to geopolitical shocks. Diversifying India’s oil basket to include more oil supplies from the US, the world’s largest producer, is also under active consideration. But the fact remains that opt-

ing out from buying deeply discounted Russian oil only implies costlier supplies from West Asia and the US.

Hoping that the current dynamics of the global oil market—that is awash in supplies due to the unwinding of voluntary production cuts by the Organisation of Petroleum Exporting Countries and its allies—will lead to a significant decline in prices in the coming months might turn out to be a false dawn. No doubt, it is true that Brent spot prices are down to \$67-68 a barrel from \$79 in January, but they appear to be somewhat “sticky” at current levels. Instead of crashing to predicted levels of \$59 a barrel in October-December and \$50 a barrel in early 2026, according to the US Energy Information Administration, they have remained resilient largely due to the continuing stockpiling of reserves by China, the second largest economy in the world.

India must therefore go all in to boost domestic oil production and improve relative self-sufficiency over the medium term. To be sure, the government is seized of the imperative of stepping up oil production by incentivising domestic producers and global giants for exploration and production (E&P), and has enacted the Oilfields (Regulation and Development) Amendment Act, 2025. Foreign drillers

will be insured against any fiscal policy changes—a major irritant that has kept Exxon, Shell, and Chevron from participating in the first nine drilling rounds. Union petroleum minister Hardeep Singh Puri states that the government is committed to increasing exploration acreage to 1 million square km by 2030 in areas previously marked as no-go zones.

Obviously, it will take more time before the pragmatic policy stance bears fruition. But the good news is that the state-owned Oil and Natural Gas Corporation (ONGC) drilled 578 wells in FY25, the highest recorded in 35 years, comprising 109 exploratory and 469 development wells. Its capex hit \$7.2 billion. ONGC has inked a contract with BP (formerly British Petroleum) to optimise oil

recovery in the relatively mature Mumbai High. Private oil and gas majors like Cairn Oil & Gas plan to treble output and account for 50% of India’s oil production. Cairn has plans to invest \$3-4 billion for E&P over the next five years. In July, Puri told Parliament that since 2015 E&P players have reported 172 hydrocarbon discoveries including 62 in offshore areas.

However, none of this appears to be reflected in any uptick in domestic output. The continuing slide in output is not just

of the state-owned oil majors but also private players whose output declined by more than half in FY25 as against record levels of production of 12 million tonnes in FY14. Reversing this fall is predicated on a much greater involvement of the global oil majors who have the expertise in deep-water exploration. Puri is bullish that India holds the potential of “several Guyanas” in the Andamans—with a gas find by Oil India—as it lies within the Bengal-Arakan sedimentary system where stratigraphic traps—underground geological formations caused by sedimentary rock layers—are conducive to hydrocarbon accumulation.

India must not be deterred by the fact that exploratory stratigraphic drilling by ONGC, Oil India, and BP—in four offshore basins, including Andamans—reportedly faces cost overruns even before this programme has commenced. E&P is serendipitous in nature and it is essential that global majors find it profitable to “drill, baby, drill” in the country. In Guyana, drilling was done in 44-odd wells but it was in the 41st one that massive oil reserves were discovered. For improving our relative self-sufficiency, it is imperative that global oil majors (including domestic players) are not constrained by the challenging business environment, including concerns around arbitration and compensation in case of expropriation.

*Views are personal*

## LETTERS TO THE EDITOR

### Regional consensus key to connectivity

“Sanctioning Chabahar” (FE, September 30) rightly says that the US decision to end the sanctions waiver is a setback for India’s regional strategy, but the larger lesson is that New Delhi must not rely on external dispensations. What is needed is an institutional framework with Iran, Afghanistan, and the Central Asian republics so that connectivity

projects are grounded in regional consensus and insulated from shifting global politics. At the same time, India should diversify through alternative hubs such as Duqm in Oman and Sabang in Indonesia, and by developing direct air links and energy supply routes with Central Asia. While India cannot match China’s financial muscle, it can safeguard its interests through durable partnerships and carefully designed alternatives. —A Myilsami, Coimbatore

### Crowd control

The Karur stampede, which claimed several lives at a rally led by actor-politician Vijay, is a grim reminder that blame games and scoring political points are worthless unless the government is serious about protecting its people. Such disasters result from overcrowding, cramped venues, poorly marked entry and exit points, and insufficiently trained staff. Other nations provide valuable lessons:

Japan and South Korea simulate crowd movement beforehand, China monitors density real-time with mobile alerts, and Western nations enforce multiple exit routes, hold emergency drills, and deploy trained personnel. India must adopt similar measures. Technology can help anticipate dangerous surges, while awareness campaigns educate people on safe conduct. —Vijay Singh Adhikari, Nainital

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CONTRAPUNTO

The length of a film should be directly related to the endurance of the human bladder

- ALFRED HITCHCOCK

Exam Begins For SIR

Close scrutiny of Bihar’s post-revision electoral roll will yield pointers that EC should look at

EC’s final electoral roll for Bihar with 7.4cr voters was announced bang in the middle of Durga Puja/Dussehra festivities that, locals will vouch, have all but put everything else on hold. It’s safe to say it’s only after Dussehra that political reactions and real impact of the special intensive revision (SIR) of voter rolls will emerge. In broad numbers, 21.5L voters were added to, and 3.7L names removed from, the Aug draft list of 7.2cr voters. The draft list had removed 65L names from Jan 2025’s 7.9cr voters – 22L of these EC had said were ‘dead’. Ground reports had exposed errors here. Fact is, the big numbers by themselves mean little. The challenge is for media, activists, voters, political parties and Supreme Court, which is hearing petitions challenging SIR, to see if the suite of



problems that cropped up in the conduct of SIR has been sufficiently addressed. This includes the crucial matter of voters’ and political parties’ trust.

EC’s sudden SIR just months before Bihar’s assembly elections was beset with controversy: one, its poor timing, two, EC’s demand for documents within a very short

window in India’s largest document-scarce state, and three, EC’s contradictory and confusing takes on Aadhaar’s legitimacy as a residency document. Matters only worsened with the commission’s brusque approach to operational questions raised about SIR’s administration. Its own rollbacks – first putting off the demand for documents, then accepting Aadhaar on SC’s directive – made SIR a political hot potato.

Undoubtedly, issues raised made voters acutely aware of what needed done to ensure they were not wrongly deleted. Heightened public awareness went some way in ensuring some disenfranchised – marginalised, women and migrants – even if at great expense of their time and effort, managed to retain their names. Bihar’s final rolls will naturally be closely parsed – who was added, who deleted, where were changes made. All eyes are now on SC as anxieties run high. After all, lessons from Bihar’s SIR will set the tone for the process nationwide.

This Will Flop

Trump’s tariff on films made abroad will hurt US studios and viewers more than anyone else. He should can it

The first movie Trump acted in – 1989’s *Ghosts Can’t Do It* – was shot partly in Sri Lanka and Maldives, among other places. And now, he’s threatened 100% tariff on American films made abroad. He’s partly right that other countries have stolen America’s film-making business like “candy from a baby”, but only about the baby – America has had a cry-baby problem for eight months and it’s only getting worse.

Hollywood, in whose defence Trump wants to raise his newest tariff wall, is more than happy to spread candy around. Like any other business, it works with an eye on its bottom line, and costs in America are often too high. Shooting in a foreign locale, despite the flight, hotel and other logistics, can be cheaper, especially when foreign govts are willing to offer single-window clearances and tax breaks. And those savings make the US film industry stronger, not weaker.



Beyond costs, multinational collaborations are the norm in film-making, because top talent in acting, direction, music, cinematography, etc, is spread around the world.

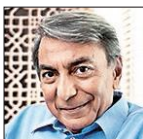
Hollywood would be decidedly poorer without Ridley Scott and Danny Boyle, both British. Or Canadian James Cameron. Post-production work has also gone global. For example, dragons for the fifth season of *Game of Thrones* were created in Goregaon, Mumbai. India’s VFX and animation industry employs over 250,000, and the number could touch 2.2mn by 2032. Sometimes, two dozen VFX studios in different locations work on a single project. It’s a distributed work model, making cinema a truly global industry.

For Indian filmmakers, Trump’s tariff will have one immediate impact, it will double the cost of screening films in US. A market worth up to \$150mn a year will be impacted. But for US, the consequences are harsher – production costs will shoot up. Smaller projects that can’t afford top dollar for US workers, nor pay tariffs, will fold up. Cinema tickets will be pricier. Okay, now we come back to Trump’s first movie, shot partly abroad. He got an award for it – Golden Raspberry for Worst Supporting Actor. He’s known to hold a grudge. Hence the tariffs? ☹

Long and short

How to make a fortune by using tariffs to manipulate stock markets

Jug Suraiya



The MAGAdomo of the White House, Peter Navarro, walks into the Oval Office where Donald Trump is poking pins into a doll labelled ‘Made in India’.

Peter Navarro: Boss, you should be doing more stuff with your tariffs.

Donald Trump: More stuff with my tariffs? Why, I’ve just slapped a 100% tariff on pharma, an’ 25% on trucks, an’ 100% on movies, an’ –

PN: What I meant was that, using your tariffs, you should go short.

DT: I’m six foot three. How in heck can I make myself short?

PN: You don’t have to make *yourself* short. You take a short position on the stock market. You borrow shares from a broker, sell them for a hundred dollars a share, you make a deal to buy the same shares back later at 90 dollars a share, and when the price comes down, you buy the shares for 90 bucks, return them to the broker, and you’ve made yourself a cool 10 bucks a share.

DT: Yeah, but what if instead of going down the share price goes up to 110 bucks, then I lose money, right?

PN: Wrong. You *guarantee* that the share price goes down by unleashing another round of tariffs, which is guaranteed to spook the market and make share prices drop.

DT: Well, that sure is a *short* cut to make one

helluva lot of moolah.

PN: When the share price is down, you take a *long* position and buy the share for 90 bucks, then you roll back some tariffs, which will boost the market, and you sell your 90 buck shares for 110 bucks. You see: short-long, long-short, up and down, like a yo-yo.

DT: Hey, that’s a great idea. I’ll put a tariff on yo-yos! But won’t all this short-long biz be short-changing that guy called the Common American?

PN: Don’t worry about that. When he voted you in, the Common American short-changed himself – and that’s the long and short of it.

The Gap Between Vijay & Victory

Karur’s a crushing lesson for the actor. For every MGR or Jayalalithaa, there are many movie stars who failed in politics. Patient groundwork is needed to turn frenzied crowds into disciplined cadres

Arun.Ram@timesofindia.com



The stampede that killed 41 people at actor-politician Vijay’s roadshow in Karur last week, and how the Tamilaga Vettri Kazhagam (TVK) president behaved after the tragedy, signify two things. One, Vijay, 5L, is arguably the biggest crowd-puller in Tamil Nadu. Two, he has much to learn if he must complete his crossover from the arc lights to the rough and tumble of politics. As Vijay remains closeted in his Chennai home after the fatal frenzy, the TVK bandwagon is at a precarious crossroads.

When he launched his party in Feb 2024, Vijay had set out on combat through co-optation. He declared DMK his main rival, but projected Periyar EV Ramasamy as among his ideological icons – in the process keeping BJP in his crosshairs. He kept his distance from DMK ally Congress yet promised to follow K Kamaraj’s ideals. He got no dalit party by his side but sought to uphold Ambedkar’s spirit. He marked his respect for women by including in his ‘sanctum sanctorum’ freedom fighters Rani Velu Nachiyar and Anjalai Ammal.

With this pantheon in place, Vijay stepped out for roadshows invoking leaders of more recent vintage. Cutouts of former CMs – DMK’s Annadurai and AIADMK’s MGR – adorned the venue of TVK’s Madurai conference on Aug 21, 2025. His message was clear: the two major Dravidian parties had lost their way, and here was he to show people a new path.

There was more to the optics. Anna and MGR were leaders of ‘change’. Anna overthrew Congress govt of M Bhaktavatsalam in 1967; MGR beat Karunanidhi’s DMK in 1977. The next year of change, Vijay said, will be 2026, when Tamil Nadu assembly elections will be held. He called it ‘varalaaaru thirumbukirathu’ – history returns.

But history doesn’t rewrite itself for political slogans. Anna’s ascent to Fort St George, the seat of power in Tamil Nadu, was a result of decades of gruelling groundwork, social engineering and political purpose.

Anna took the torch of the self-respect movement from Periyar, and respectfully disagreed with his mentor to turn Periyar’s Dravidar Kazhagam into a political party called DMK. He shone the light on what today Stalin calls the ‘Dravidian

dreams of repeating. With MGR, he tries to draw another parallel – of a successful crossover from the world of movies to politics.

Yet, even here, the comparison is flippant at best. Unlike Vijay – or Kamal Haasan, for that matter – MGR was as much a politician as an actor before he launched ADMK that later became AIADMK, on Oct 17, 1972.

For over two decades since the late 1940s, when movies and Dravidianism



Taking Anna’s name was a convenient, if feeble, attempt at alluding to a change in govt Vijay dreams of repeating

model of governance’. Anna was erudite, tireless and inspiring, both as a party builder and a mass leader – till cancer took his life at age 59, two years after he became CM.

For Vijay, taking Anna’s name was likely a convenient, if feeble, attempt at alluding to a change in govt that he

were in a symbiotic relationship, MGR was DMK’s Trojan horse. He carried the party ideology to the masses through characters and dialogues, several of them penned by Karunanidhi. Anna too wrote scripts for movies rife with Dravidian political philosophy. When he rebelled against Karunanidhi and got expelled from DMK, MGR was the party’s treasurer.

MGR’s political success was the result of a seamless transition from reel hero to a real one. This he achieved through a combination of a cultivated onscreen image and a genuine concern for the poor: MGR never played a negative

‘In Western Ghats, India’s next great story is quietly unfolding’

World-class innovation can thrive in non-metro India, writes Union education minister, and the model for it can be found in a tech hub headquartered in a small town

Dharmendra Pradhan



There are times in world history when time-honoured certainties give way, and confusion takes hold. The givens turn out to be fragile assumptions. Volatility renders clarity elusive, while vagueness and tentativeness reign supreme. Such conditions are recipes for demotivation and demoralisation, leaving individuals confused. But history shows human industry and ingenuity have always defied such periods and emerged victorious.

Since WWII, more people have been moved out of poverty and degradation than any other period in human history. Grounds for optimism exist, in the worst circumstances. But building on those grounds calls for conviction and dedication to a cause larger than narrow self-interest.

When generalised prosperity is seen as the path to one’s own rise in the world, new pathways open up, even as doors slam shut on traditional routes. And then there are those who would always shun the comfort and security of convention to take paths less travelled.

On a recent visit to Tenkasi, a town that quietly defies expectations, I was left reflecting on the balance between heritage and modernity. Tenkasi, a picturesque town in the foothills of Western Ghats in Tamil Nadu, holds a profound cultural and spiritual connection to Kashi. Its very name, meaning ‘southern Kashi’, reflects this bond, with the majestic Kasi Viswanathar Temple at its heart – dedicated to lord Shiv in the same form worshipped in Kashi.

But Tenkasi’s religious heritage isn’t what drew my attention. It was Sridhar Vembu and his company, Zoho, which established a base at Mathalamparai village here as part of a bold vision to decentralise tech from urban India. I discovered Tenkasi is far more than a business outpost. It’s a seamless fusion of the ancient

and the contemporary. This unlikely blend challenges conventional ideas of modern life, inviting us to reimagine purpose and progress beyond the confines of metropolitan bubbles.

Zoho’s newly built campus in Tharuvai, on the outskirts of Tenkasi district, is more than just a hub for smart tech solutions. It also houses Zoho Schools of Learning, which follow a model of skilling and paid internships, where young men and women from nearby



Tenkasi: A temple & tech town

rural areas gain hands-on training in tech, earning as they learn.

Another innovation is Kalaivani Kalvi Maiyam in Govindaperi village, Vembu’s current address. It’s a school like no other. Here, children from nearby villages receive free education. But what was truly moving was the ecosystem of care it fosters: mothers tend the gardens,

cook wholesome meals and serve lunch to their own children – right where they learn and grow. No fees, no frills – just grace, dignity and boundless love.

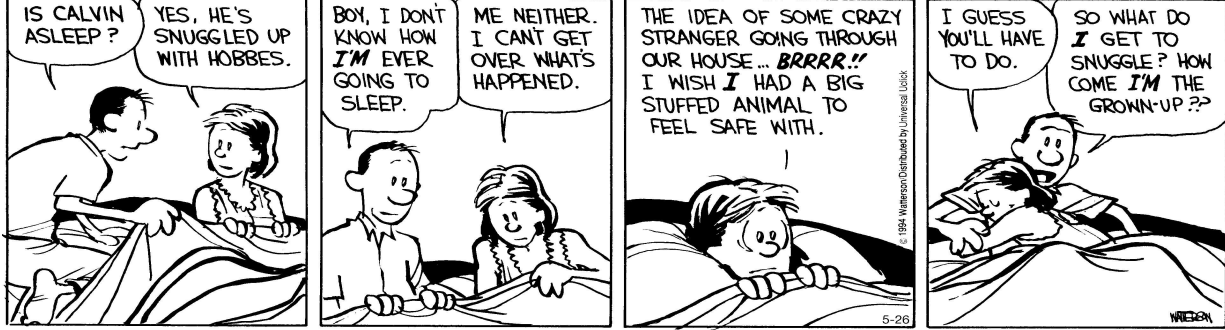
At mechatronics startup Karuvi, young engineers build industrial power tools, powering a rural revolution. More than manufacturing, it equips local youth with skills, confidence and a reason to stay rooted, turning every tool into a step away from poverty and migration.

Vembu, a Padma Shri, embodies this vision with his simple life in Tenkasi – far from glass towers of Bengaluru or San Francisco. He’s proving world-class innovation can thrive in rural India. What sets him apart is his ability to spot untapped talent in tier-2 and tier-3 towns – youth often ignored by mainstream IT industry yet rich in potential.

Vembu’s mission aligns closely with PM’s vision of Atmanirbhar and Viksit Bharat – a self-reliant, developed India driven by indigenous innovation and decentralised growth. By nurturing talent in rural areas and creating knowledge hubs outside urban centers, Vembu is turning this vision into reality, revitalising villages instead of emptying them of their brightest minds. His ambition goes beyond nation-building: he aims to challenge global IT giants and transform Zoho into a truly homegrown multinational rooted in Indian soil.

Unlike the typical startup chase for unicorn valuations, Zoho pursues a rarer prize – steady, revenue-driven growth that uplifts millions from poverty. It’s a courageous rejection of glamour, a steadfast commitment to sustainable nation-building. Standing in Tenkasi, one’s reminded of Tamil poet Subramania Bharathiyar who envisioned a self-reliant India where villages thrived with industry and dignity through work and knowledge. Zoho’s rural revolution feels like a living tribute to that dream – tech nurturing villages, not draining them. Here, beneath the Western Ghats, where Bharathiyar’s vision meets Modi’s Atmanirbhar Bharat, India’s next great story is quietly unfolding.

Calvin & Hobbes



Difficult Times Have Silver Linings

Sant Rajinder Singh

The pendulum of life oscillates between fleeting moments of joy and seemingly longer periods of pain. This appears to be the reality of life for most of us, despite our best efforts to create happy and calm lives. We believe that things will never improve for us. However, upon reflection, we find that periods of difficulty often have a silver lining. There are times when we are suffering or maybe our family and friends are suffering, so we feel their pain. We may have financial hardships. Those periods are terribly painful. Sometimes, we encounter multiple problems at once. We wonder if God will ever give us a break.

Yet, what we may not realise is that many of these events are due to something we did in the past. The third law of physics, which states that every action has an equal and opposite reaction, is

at work. Whatever actions we took caused reactions. It could be a reaction to something we thought, said, or did in the past. While it is painful and we suffer, we should recognise that it is a debt we owe that must be repaid. We may have done something to someone in the past, and we must later face the consequences of our actions. But even though we have passed through rough times, they do not last forever. There are also sunny days ahead for us.

A sunny day arrives at a time when, once that debt is paid, we are free of it. The weight that covers our soul and keeps us tied to this physical realm begins to lift. We are then lighter and can soar higher. Like a hot-air balloon weighted down with sandbags, when we toss out those weights, the balloon can lift off to soar.

Our load is lightened, and we can experience more inner progress free of those burdens. We can learn how to lead our lives to make spiritual progress. We can lead our lives in a way that we are conscious of our thoughts, words, and deeds.

When we realise that life brings rainy days and sunny days and that there is a purpose for what happens to us, life becomes calmer and more peaceful. We can learn how to stay at an even keel, whether we are passing through stormy or sunny days of life, by finding a calm centre. We can reach this still point through meditation. Within us are all the riches of divinity. We are not just the body and mind, but the soul. The soul is filled with light, love, and joy. It relates to the Source of divinity, creative Power, which is also light, love, and joy.

Sacredspace

Your task is not to seek for love, but merely to seek and find all the barriers within yourself that you have built against it.

Rumi



THE SPEAKING TREE