



Nothing at all

The Centre must negotiate in good faith with Ladakhi leadership

Activist Sonam Wangchuk's release on March 14 ended a months-long legal and political standoff between his allies and Ladakh's leadership on one hand and the Centre on the other. Detaining him under the National Security Act 1980, the Centre alleged that he was the "chief provocateur" of the September 2025 violent clashes in Leh that left four dead, and dubbed his presence in the region a catalyst for an "Arab Spring-like" mobilisation to force its hand on Ladakh's constitutional status. The Centre also argued that given Ladakh's borders with China and Pakistan, continued "instigation" by a high-profile figure such as Wangchuk threatened territorial stability. About six months later, the Ministry of Home Affairs modified its order, intending to create an environment of "peace, stability, and mutual trust" and resume formal talks with the Leh Apex Body (LAB) and the Kargi Democratic Alliance (KDA). But even as a judicial commission was still investigating the September violence, Wangchuk's release and his wife Gitanjali Angmo had successfully undermined the government's case. Foremost, the alleged evidence of incitement was a translation of a short speech padded with pages of "aspirations" – a legally dubious pattern seen in the Elgar Parishad, Delhi liquor scam, and G.N. Saibaba cases. His lawyers also pointed to Wangchuk's social media posts condemning the unrest that day.

The Supreme Court had also expressed serious concerns over Wangchuk's health in Jodhpur jail. His release came just three days before the Court's final hearing on the matter, letting the Ministry to avoid a potentially embarrassing ruling that could have deemed the detention arbitrary. But while Wangchuk's release has defused the immediate tension, the political situation remains fundamentally unresolved. Two days on, Leh saw massive rallies for the first time since September 2025, while Kargil observed a shutdown, with local leaders saying that the agitation for constitutional safeguards would continue. Talks between Ladakh bodies and the Ministry have however been inconclusive, with LAB and the KDA reiterating their demands for statehood and Sixth Schedule status – already recommended by the National Commission for Scheduled Tribes and promised in the BJP's 2020 election manifesto. Crucially, other activists, including Deldan Namgyal and Smanla Dorje, remain in detention. In effect, what Wangchuk's detention was meant to serve is unclear, beyond allowing the Centre to brandish its heavy hand, worsening his health, and stalling negotiations. Unless the Centre can negotiate in good faith with the Ladakhi leadership and provide concrete timelines, the people of Ladakh will not get their due.

Prison outbreak

India's overcrowded jails pose a serious health risk to inmates

The public health crisis in India's prisons is distinguished by its poorer infrastructure and a general disregard for treating ailments until they become inconvenient. A prisoner does not lose the right to health, a point courts have repeatedly stressed; yet, between August 20, 2025, and March 9, 2026, around 92 inmates at the Jalpaiguri Central Correctional Home were infected with herpes simplex virus (HSV) and seven of them died. HSV is common in the general population but experts have said that in immunocompromised or overcrowded populations with poor care, it can lead to encephalitis, which is often fatal. The Home's 171% occupancy rate rendered good hygiene and isolation a luxury. According to the 2023 Prison Statistics of India, district prisons in West Bengal have reported occupancy rates exceeding 160% and certain facilities, such as the Kandi Sub-Jail, have historically reached staggering levels of over 400%. While the State has many foreign national inmates, overcrowding is a persistent fact of India's correctional facilities. In 2023, 30% of inmates in 10 prisons in Kerala were found to have skin diseases caused by humidity and a lack of personal space. A 2023 study in *The Lancet Public Health* found prisoners in India five times more likely to develop tuberculosis (TB) than the general population. In 2025, the Home Ministry ordered prison screening camps as unventilated environments allow TB to spread rapidly. The Nagpur and Indore central jails had major COVID-19 outbreaks.

According to the India Justice Report 2025, HIV prevalence among inmates is also significantly higher than the national average due to shared equipment and inadequate screening at entry. Mandatory, comprehensive medical screening could catch many of these infections before they become injurious, which also requires facilities to have the requisite personnel. But the report also flagged a 43% vacancy rate for medical officers, resulting in the number of inmates per doctor being 2.6 times higher than recommended by the Model Prison Manual. There are also only 25 psychologists for India's 5.7 lakh inmates. Filling this gap requires integrating prisons into the National Health Mission, ensuring a sufficient number of health workers trained to manage outbreaks, and enforcing the Manual's standards uniformly across States. As West Bengal's actions in 2020 illustrate – temporarily releasing thousands of underlings to relieve overcrowding in the South 24 Parganas District Correctional Home and the Baruaipuri Central Jail – the solutions are not confined to health. The judiciary must fast-track cases involving undertrials, who constitute the majority of inmates, expand the use of bail and non-custodial alternatives for minor offences and expedite the repatriation of foreign nationals.

India's West Asia reset, more sinned against than sinning

During the past month, Indian policy towards West Asia has stirred domestic controversy. As substantive Indian interests are at stake, a professional assessment, based on two trends, is offered without wading into the domestic political blame game.

A link to two trends

First, over the past decade, India has raised its diplomatic engagement with West Asia. Prime Minister Narendra Modi has made 15 visits to the six countries of the Gulf Cooperation Council (GCC) – some after a multi-decade hiatus. He also visited Israel twice, and the Palestinian Authority and Iran each once. Comprehensive Economic Partnership Agreements (CEPA) have been signed with the United Arab Emirates (UAE) and Oman, and similar negotiations are underway with the GCC and Israel.

With over \$160 billion in bilateral trade and 10 million diaspora, the GCC ranks as India's largest socio-economic partner. Last decade's engagements spurred synergy, although the promised investments have lagged. India's political gains include a de-hyphenation with Pakistan, greater strategic convergence with stronger defence and security tie-ups and growing acceptance of India as a responsible and friendly status quo power.

Second, the Gulf monarchies' ardour for a foreign power is normally rooted in the foreign power's potential contribution to the security and stability of their royal family, state and region – in that order. Exceptional turmoil in West Asia since October 2023, and a three-week-old war with the GCC countries under direct Iranian drone and missile attacks and the closure of the Strait of Hormuz, have accentuated their search for a better security paradigm than the eight-decade-old regional Pax Americana.

The recent reset in India's diplomacy in West Asia largely acknowledges the aforementioned two trends and attempts to harness them to serve India's national interest. To their credit, India's policymakers have finally realised which side of the bread is buttered, and have launched a qualitative upscaling of a symbiosis with key West Asian countries. Recent initiatives, such as Mr. Modi's visit to Israel and his individual phone calls to all his GCC counterparts during the early days of the hostilities, have not only assured them of India's categorical support to their security and stability but also conveyed that India shares and prioritises their concerns at this critical juncture. Later, he also spoke with his Iranian counterpart.

The new doctrine is clearer-sighted and emphasises hard diplomacy. This reset is bereft of two traditional aspects that often dampen the bilateral amity: First, India did not chant the traditional please-all mantras that left all



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stakeholders partially satisfied and India at the margins of the arena. There was no attempt to "balance" its public policy on controversial issues such as the "two-state solution" and Iran's quest for nuclear technology. Second, India's statements reflected its views without needless third-party citations. This demonstrates India's growing confidence as a credible and autonomous power.

Some domestic detractors have criticised the policy reset on multiple grounds. First, Mr. Modi's Israel visit (February 25-26) that concluded two days before Tel Aviv unleashed a military campaign against Iran is seen as untimely. Second, the perceived abandonment of India's traditional support for Palestinians and Iran is seen as immoral. Third, South Block is accused of surrendering India's sovereign autonomy to western dictators. Fourth, this activist reset may lead to strategic overreach with concomitant challenges such as exposure to security threats and costly defence tie-ups abroad.

The dates of the Prime Minister's visit to Israel would have been set weeks in advance without any premonition of the February 28 offensive. The West Asian situation being perennially on the front burner makes any such visit risky, giving the expert factor criticism of the timing an unfair advantage of 50:50 hindsight. At the same time, the focus of the visit being bilateral renders it in a different domain.

Where other international actors stand

The perceived "immorality" of India's reset is largely misdirected and should be aimed at more worthy targets, such as China, Russia and Pakistan. Beijing siphoned off nearly 90% of the sanctioned Iranian oil exports, rendering only lip service to Tehran; Russia, which signed a 20-year Comprehensive Strategic Partnership Treaty with Iran last year, has also underdelivered. And last year, Pakistani generals promised to nuke Israel if it attacked Iran; they are now U.S. President Donald Trump's favourites. Similarly, even the Arabs and Muslim states were conspicuously silent during the Gaza conflict.

While the Indian reset is a long-overdue recognition of the tectonic geopolitical shifts in West Asia, the pendulum swung to the other extreme and is being gradually realigned with national interests. The regional dynamic being notoriously mercurial, India should strive to keep its options more open. The Palestine Cause cannot be wished away forever. At the end of the day, Iran would remain an important player for India as an oil supplier and as a large market for Indian products, reconstruction projects and services. Iran, which borders Pakistan and Afghanistan, could be a strategic ally. Further, if subterranean trends such as growing Arab unease with the American and Israeli Armageddon, the

India needs balance, sensitivity and ability to leverage emerging opportunities in West Asia

A bit of a blur over India's new carbon credit plan



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explicitly excludes agriculture from CCUS strategies because agricultural emissions are difficult to biologically mediate and suited to the point-source capture technology that defines CCUS. The road map draws a clear line between CCUS (preventing new industrial emissions) and Carbon Dioxide Removal or CDR (drawing down existing atmospheric CO₂), where agriculture, through soil carbon sequestration, biochar, and agroforestry, plays a starring role.

The second is the persistent counter-narrative of farmers as climate solutionists. Despite this clear industrial focus, articles and social media discourse have propagated a different story. This narrative posits that the budgetary outlay will directly enable farmers to participate in carbon markets by adopting regenerative practices, turning "farms into climate solutions".

The root of the confusion

This interpretation appears to conflate two distinct concepts. The Budget's CCUS fund (for industrial carbon capture) and the broader, evolving voluntary carbon market in India, where agriculture and forestry projects are already beginning to generate credits for global and domestic buyers. Proponents of the "farmer" narrative point to the growing global and domestic demand for nature-based carbon credits. Several private sector initiatives and State-level programmes are already piloting models where farmers are compensated for practices that enhance soil organic carbon. The confusion likely stems from the Budget's use of the term "carbon credit programme" in a broader sense, while its detailed architecture, as per the DST road map, is exclusively industrial.

Analysts say the confusion highlights a communication gap and a policy opportunity. The DST road map is a technically sound, sector-specific document, but the Budget's use of the more familiar term 'carbon credit' has blurred lines. Mention of a "programme" amid

Saudi-UAE rift, the Iraq-Iran estrangement, and aggressive positioning by Pakistan and Türkiye are taken on board, a more nuanced reset would have suitably underscored continuity and inclusion. In retrospect, India could have reacted faster to the developments, such as the assassination of Iran's Supreme Leader and the appointment of his successor. Political correctness should not make India taciturn, as the diplomatic doublepeak offers many ways to skin the proverbial cat. India's relations with the U.S. and Israel are not so fragile as to be upended by our agreeing to disagree. Finally, India could have rendered more humanitarian relief to millions affected by the hostilities.

An opportunity for India

The ongoing reset should accommodate two incipient, but profound, regional movements with long-term positives for India. First, the long-standing "Oil-for-Security" compact between the Washington-led West and the moderate Arab regimes has become a collateral casualty of the ongoing U.S.-Israel war against Iran. The U.S. joined Israel in attacking Iran without prior notification to the GCC, ignoring the latter's cautionary advice. The West not only failed to protect them from Iranian retaliation, but its military bases on their soil became lightning rods for the Iranian attacks. Now, they fear that the U.S. may abruptly conclude the campaign, leaving them to face Iran's wrath. Once the dust settles, the GCC states may reduce their reliance on the U.S. and diversify their security partnership options to countries such as India, which are less likely to act as a Praetorian Guard. India's response to any such proposal ought to be based on a careful SWOT analysis with clear rules of engagement.

Second, the Iranian realignments against the GCC have disrupted business activity and supply chains, and an early return to "business as usual" appears unlikely. The GCC's appeal as an oasis of eco-political stability in the turbulent region has taken a serious long-term knock, leading to some stakeholders' clamour for a "GCC+1" strategy. India's eco-diplomacy must strive to position India as a viable and attractive alternative hub to the GCC's ritzy but fragile hotspots, which thrived by wearing away capital and talent from India. The current confluence is a historic opportunity to seize what is rightfully ours.

To remain relevant and effective, a country needs a dynamic foreign policy grounded in realism and national interest. Its execution requires the right mix of consistency, agility and modulation. As India's West Asia policy matures, it is relevant to recall British Prime Minister Lord Palmerston's maxim, "We have no eternal allies, and we have no perpetual enemies. Our interests are eternal and perpetual..."

A significant policy announcement in the Union Budget 2026, involving a massive \$20,000 crore outlay for a carbon credit programme, has sparked a wave of confusion and conflicting reports, pitting a clear-cut governmental road map for heavy industry against a burgeoning narrative of a new income stream for India's farmers. At the heart of the debate is a fundamental question. Is this Budget allocation designed to fund Carbon Capture, Utilization, and Storage (CCUS) technologies for smokestack industries? Or is it a pioneering scheme to help farmers earn carbon credits through sustainable agriculture? Evidence from official documents suggests the first, but a persistent parallel narrative, echoed in several media reports, insists on the second.

The first is the CCUS for "Hard-to-Abate" Industries. The unambiguous anchor for the Budget announcement is the "R&D Roadmap for CCUS", released by the Department of Science and Technology (DST) in December 2025. This technical document, which forms the basis of the budgetary provision, leaves little room for ambiguity regarding its scope and intent. The road map explicitly identifies its target sectors, power, steel, cement, refineries, and chemicals. These are labelled as "hard-to-abate" industries where process emissions are concentrated, measurable, and technically challenging to eliminate through renewable energy alone. The proposed \$20,000 crore over five years is earmarked for large-scale deployment of CCUS technologies, essentially capturing carbon dioxide from factory flue gases and either using it industrially or storing it underground.

Not on the list

Crucially, agriculture is conspicuously absent from this list of CCUS sectors. The road map acknowledges agriculture as a source of greenhouse gases (primarily methane and nitrous oxide) but only in an inventory context. It

The strategy requires distinct focus on both 'smokestack' and 'soil' initiatives

discussion of agricultural carbon credits has led some to expect a funded scheme for farmers. This expectation is plausible, as the Agriculture Ministry has been exploring soil health and climate-resilient farming for years. A structured carbon farming programme is a logical next step, but it would need separate policy, funding, and institutional frameworks distinct from the costly, tech-heavy CCUS initiative.

The government faces the task of clarifying this distinction to manage expectations. The \$20,000 crore CCUS programme is a critical pillar for decarbonising industry, a sector vital for growth but also responsible for a quarter of India's emissions. Its success is non-negotiable for meeting net-zero goals.

Simultaneously, the powerful narrative around farmers and carbon credits highlights a massive parallel opportunity. India's vast agricultural lands hold immense potential for carbon sequestration. A separate, well-designed policy to create a trusted domestic carbon market for agriculture could unlock enormous economic and environmental benefits, truly creating a "new income stream" for farmers.

A multi-sector approach is needed

The current debate underscores a pivotal moment in India's climate strategy. Budget 2026 has firmly placed its \$20,000 crore bet on industrial decarbonisation through CCUS. The "farmer carbon credit" story, while not funded by this specific outlay, reflects a powerful and growing reality in the voluntary carbon space and a compelling demand for a parallel policy initiative. The path ahead requires the government to clearly demarcate these two crucial fronts in the climate fight – smokestack and soil – while advancing both with equal ambition. The confusion may be born of conflation today, but it points to the comprehensive, multi-sector approach India will need to forge a sustainable future.

LETTERS TO THE EDITOR

Watch and sign

India's decision to ink a trade deal with the United States only after clarity on tariff issues may come unstuck considering the impulsive nature of U.S. President Donald Trump. Those who had been exporting to the U.S. have burnt their fingers already and will be weary of considering exporting their products to the U.S.

hereafter. The Centre may like to improve and stabilise its diplomatic ties with the U.S. but the Indian exporters may not want to take a risk. Indian exporters, who thrive on thin margins of profit, will keep themselves away from American importers as the imposition of harsh American tariffs at any given point of time cannot be ruled out (Front page,

March 17).
V. Lakshmanan,
Tirupur, Tamil Nadu

The government's decision reflects a pragmatic and strategically sound approach. A premature agreement without clarity on how competing economies are treated could weaken India's export competitiveness in key sectors such as textiles,

pharmaceuticals, and engineering goods.
Vidyasagar Reddy Kethiri,
Hanamankonda, Telangana

Political graffiti removal

The Election Commission of India recently announced the election schedule for four States and a Union Territory. Soon after, municipal authorities across cities and towns began removing political graffiti

and wall writings put up by various political parties. Why should taxpayers' money be spent to clean up publicity material created by political parties? The government is now spending significant resources on labour and paint to erase these writings from public walls. If political parties are allowed to use public spaces for party or party leaders' publicity, they

should either be required to pay a fee for such use or be made responsible for removing the graffiti within a stipulated period of time. In case of non-compliance, the authorities should recover the cost and initiate appropriate legal action.
Y.R.M. Rao,
Chennai

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

Why the affiliation system is outdated

Often less discussed feature of the National Education Policy (NEP), 2020 is the new regulatory system envisaged for affiliating colleges. The objective of the new system is to foster empowerment and autonomy by gradually phasing out the affiliation system over a period of 15 years through a process of graded autonomy.

The NEP suggests that each existing university should play the role of a mentor for its affiliated colleges, and enable them to develop their own capabilities and achieve minimum benchmarks in academic and curricular matters, teaching and assessment, governance reforms, financial robustness, and administrative efficiency in order to become self-reliant. All affiliated colleges will have to attain the minimum required standards to secure accreditation benchmarks and acquire the status of an autonomous degree-granting institution. Needless to say, it is a big reform for which nation-wide efforts and governmental support is a *sine qua non*.



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stability, it now seems to hinder the growth, autonomy, and quality of colleges. The university affiliation system is now riddled with systemic inefficiencies, archaic academic rigidity, and administrative challenges that impede the progress of colleges.

Multiple challenges

One of the most significant problems with the affiliation system is the overwhelming burden it places on universities. Most universities in India are affiliated with hundreds of colleges, and entrusted to manage examinations, evaluate answer scripts, design curriculum, monitor college compliance, and oversee academic and extracurricular activities for an overwhelming number of students. The attention of resource strained universities, especially State universities, gets diverted from their core functions, such as research, innovation, faculty development, and collaboration, due to heavy administrative workloads. As a result, universities are compelled to act merely as bureaucratic bodies instead of pushing the boundaries of knowledge both for students and faculty.

The lack of autonomy for affiliated colleges poses another challenge. Under the present university affiliation system, it is mandatory for all colleges to follow the regulations, syllabi, examination patterns, and administrative instructions issued by the affiliating university. This dependency prevents colleges from designing their own courses that align with their local or industrial needs, and emerging market trends. This rigidity imposes uniformity at the cost of creativity, denying colleges the freedom to differentiate themselves through specialised courses, modern pedagogical practices, or interdisciplinary initiatives. As a result, the potential for innovation is stifled.

Then there is the slow pace at which curriculum reforms take

place under the university affiliation model. Since universities oversee a large number of colleges, revising curricula requires extensive consultations, committee meetings with the board of studies and department councils, and administrative approvals from academic councils. This process often takes a very long time, causing course content to become outdated by the time reforms are implemented. The educational needs of students in disciplines such as engineering and technology change very rapidly, but the affiliation system is simply not agile enough to respond with the required speed.

Moreover, the affiliation model, despite its best intentions to standardise education, has led to quite the opposite. While all colleges may follow the same curriculum, the actual delivery of education varies drastically due to the huge gaps in infrastructure. Many colleges operate with inadequate laboratories, insufficient library facilities, outdated equipment, and a shortage of qualified teachers. Such disparities weaken the credibility of standardised learning outcomes, as students from different colleges under the same university may graduate with vastly different levels of skill and competence.

An alternate model

While the university affiliation system once played a vital role in expanding higher education, its limitations now hinder progressive educational aspirations.

Instead of affiliations, colleges may be encouraged to participate in the National Institutional Ranking Framework/National Board of Accreditation exercise which is grounded in established quality criteria. The future of higher education in India hinges on empowering institutions with autonomy, flexibility, and the capacity to innovate freely – conditions the affiliation system can no longer adequately provide.

The cost of energy transition

Protests against the hydroelectric project in the Western Ghats just got new life

STATE OF PLAY

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The Karnataka High Court, earlier this month, directed the State government to stop work in the forest area for the Sharavathi Pumped Storage Hydroelectric Project, until further orders. A group of environmentalists had moved the Court, challenging the State Wildlife Board's approval for the proposed project in the Sharavathi Lion-Tailed Macaque Wildlife Sanctuary which is part of the Western Ghats, and a biodiversity hotspot. The Court's order boosted the morale of the environmentalists, who have been opposing the project since it was proposed in 2017.

The Karnataka Power Corporation Limited (KPC) proposed the project in the valley of the Sharavathi river, which flows for about 130 km through the Western Ghats before reaching the Arabian sea. The river is already the State's primary hydel power source, with four major power stations operating in its valley.

The KPC aims to generate 2,000 MW through this project to meet peak-hour energy demands, which can touch 18,000 MW daily. The project has been defended on the grounds that the Central Electricity Authority has recommended a transition to clean energy, targeting 50% non-fossil fuel capacity by 2030. The cost of the project which was estimated to be around ₹4,800 crore in 2017, has gone up to nearly ₹10,240 crore.

Furthermore, while the project has received the approval of the State Wildlife Board and an in-principle approval from the National

Board of Wildlife (NBWL), forest and environmental clearances are still pending.

Environmental concerns

The Karnataka State Wildlife Board gave its approval for the project in January 2025, with certain conditions. Initially, the KPC had estimated that more than 16,000 trees were to be cut for the project. The board suggested that it be reduced to 7,000 to 8,000 trees.

Even so, the project continued to face stiff opposition from different groups. Environmentalists, locals, farmers' organisations, and heads of religious institutions spread over the Shivamogga and Uttara Kannada districts have been protesting against the project. They have held several meetings and highlighted the destruction the project will cause to the forests and the endangered species of flora and fauna, including the lion-tailed macaques, who are endemic to the place. Local residents, who have witnessed frequent landslides during heavy rains in the past few years, are worried that the construction of the tunnel might cause irreparable damage to the region. They are also concerned that the implementing agency might take additional forest land to lay the lines needed to carry the power generated by the project. Petitioners, including environmentalist Akhilesh Chipli, have alleged that

the project is against the laws that prohibit non-forest activities in the region.

Interestingly, a site inspection report filed by Praneetha Paul, Deputy Inspector General of Forest of the Regional Office of the Ministry of Environment, Forest and Climate Change (MoEF), did not recommend the project proposal. The officer stated that the construction of new roads, and the widening of existing roads and other structures would result in the complete destruction of the wet evergreen forests, and that cutting trees would isolate the population of lion-tailed macaques. Environmentalists have cited this report as a key document to support their arguments.

Considering the serious opposition from the public, representatives of the KPC held meetings in parts of Shivamogga and Uttara Kannada in October 2025 to defend the project. A team official tried to convince the people that the impact of the project would be minimal. They also argued that the project was necessary considering the need to reduce dependence on fossil fuels for energy production.

Enduring fight

However, the KPC's efforts have failed to convince the protesters. Considering the stiff opposition, the MoEF sent an expert panel to visit the project site, and the panel, in its report, stated that the "limited operational benefit offered by the project seems outweighed by the irreversible ecological, environmental and social costs involved."

The legal setback and the adverse expert report have created a significant hurdle for the project's proponents. The KPC's next move before the Court and the NBWL will be keenly watched.

Untethering colleges

The college-university affiliation system has long served as the foundational structure for higher education and is so deeply entrenched in the Indian higher education system that disassociating colleges with the university sounds unrealistic. Universities conduct affiliation for colleges in accordance with the University Grants Commission (UGC) guidelines to maintain academic standards, ensure uniform curriculum and examinations, and regulate infrastructure and faculty quality. Moreover, college affiliation in India is not a one-time process. The affiliation is usually granted initially for one year and renewed annually or periodically.

However, while the conventional university affiliation model once provided centralised control and administrative

The university affiliation system is now riddled with systemic inefficiencies, archaic academic rigidity, and administrative challenges that impede the progress of colleges

T.N. needs more basic science funding to create green tech

Although revenue spending on science and technology has risen in recent years, State funding for fundamental research has been modest

DATA POINT

Vasudevan Mukunth

As Tamil Nadu approaches its Assembly elections, its ambition to become a \$1-trillion economy by 2030 and its position as one of India's leading industrial and knowledge hubs means it's worth examining how the State has invested in science and environmental issues in the last few years.

First, the State's strategy for the environment has been to integrate climate action across sectors rather than increase a core allocation for the environment and climate change department. Within this framework, it has launched a series of dedicated environmental missions since 2021. In the 2021-22 fiscal, the State allocated ₹500 crore to establish the Tamil Nadu Climate Change Mission – one of the first of its kind among States – and another ₹150 crore for the Wetlands Mission to restore 100 ecologically sensitive water bodies. The following year, the State established the Tamil Nadu Green Climate Fund with a ₹1,000 crore corpus to finance renewable energy, electric mobility, pollution-control technologies, forest conservation, and circular-economy projects, among other climate-related technologies.

By 2023-24, it had expanded its conservation efforts by dedicating ₹10 crore to Project Nilgiri Tahr and scaling up the Green Tamil Nadu Mission to increase forest cover. The 2024-25 Budget expanded the Sustainably Harnessing Ocean Resources (SHORE) scheme to strengthen the blue economy, and provided subsidies for electric vehicles.

Spending surged in 2025-26 as the government allocated ₹21,178 crore to the energy department, which includes investments in renewable generation, pumped-storage hydro projects, battery energy storage systems, and other infrastruc-

ture, and ₹100 crore to build new basic science research centres in Chennai and Coimbatore.

Not enough funds

Second, although revenue spending on Science and Technology (S&T) has risen in recent years, it still represents only a small share of the State's broader fiscal priorities. It is important to note that according to the National S&T Management Information System (NSTMIS), Tamil Nadu had spent more than ₹600 crore a year on overall R&D until 2020-21. The difference arises because the NSTMIS assesses R&D expenditure across departments rather than going by the expenses under the S&T head.

Even this figure has two important dimensions. For Tamil Nadu, this expense is spread across agriculture (crop research, pest control, etc.), veterinary services (livestock and aquaculture research), public health (clinical research at State medical colleges), and other applied sectors. Dimension 1: applied research doesn't produce the underlying intellectual property (IP). Dimension 2: in the same period when Tamil Nadu spent just over ₹600 crore a year on R&D, Gujarat spent ₹922 crore and Uttar Pradesh, more than ₹1,000 crore.

Chart 1 shows the expenditure on research and development by select State governments.

A global comparison is possible as well. When South Korea's Gross Domestic Product (GDP) per capita was what Tamil Nadu's is today, it was already allocating 1.2% of its GDP to R&D.

However, Tamil Nadu's total R&D expenditure is under 0.5% of its Gross State Domestic Product (GSDP), meaning that the State is currently spending less than half of what is required (by the South Korean yardstick) to foster a world-class innovation ecosystem.

The State's dedicated budgetary allocation for Science and Technology in particular has been much lower. In the decade or so leading up to 2021-22, Tamil Nadu

had an annual revenue expenditure averaging around ₹10 crore, primarily for running the Tamil Nadu State Council for Science and Technology (TNSCST), the Science City in Chennai, the Tamil Nadu Science and Technology Centre, and for student projects and popularising science. But as it pivoted to being a technology-driven economy and got going on its 'net zero' commitment, the figures began to climb. By the 2025-26 fiscal, the allocation reached ₹67.5 crore and in 2026-27, an estimated ₹81 crore.

Need to focus on basic science

While the increase between pre-2021 and 2021-27 is eightfold in nominal terms, it is dwarfed by the allocations for climate-related missions. The State set aside more than ₹21,000 crore for the energy sector in 2025-26 alone. In fact, until it announced the ₹100 crore package in the 2025-26 Budget for the new basic science research centres in Chennai and Coimbatore, State funding for fundamental research was modest – most of it in the form of small grant programmes (₹10,000 to ₹1,00,000) such as those administered by the TNSCST. Major research institutions in the State, such as the Indian Institute of Technology (Madras) and the Institute of Mathematical Sciences, are mostly funded by the Union government.

Chart 2 shows the budget allocated by the State to the Science and Technology Centre and the Council for Science and Technology.

As a result, the State currently lacks the mature R&D required to develop homegrown technologies. Tamil Nadu's current expenditure risks rendering it a consumer of green technologies rather than a creator of underlying research breakthroughs. For instance, despite Tamil Nadu being a national leader in solar installations, more than 80% of photovoltaic modules in these projects are imported from China or sourced from manufacturing hubs in Gujarat.

Funding gap

The data for the charts were sourced from S&T Research Development Statistics 2022-23 and Tamil Nadu Budget



CHART 1: Expenditure on research and development by select State governments (in ₹ crore)

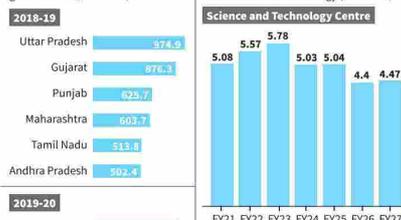


CHART 2: Budget allocated to the Science and Technology Centre and the Council for Science and Technology (in ₹ crore)

Tamil Nadu's current expenditure risks rendering it a consumer of green technologies rather than a creator of underlying research breakthroughs

With inputs from Nivedha M., who is interning with The Hindu Data Team

FROM THE ARCHIVES

The Hindu

FIFTY YEARS AGO MARCH 18, 1976

Coonoor polio vaccine unit to be closed

New Delhi, March 17: The oral polio vaccine production unit at the Pasteur Institute, Coonoor, will be closed with effect from March 31. Meanwhile, there is a move for handing over the institute itself to the Centre.

The closure of the vaccine unit, run with Central grants routed through the Indian Council of Medical Research, was decided upon by the Health Ministry on the basis of the opinion of technical experts who had gone into its defective functioning. The technical opinion was that the unit could not be revived without a very heavy expenditure and that even then it was doubtful whether it would be able to produce good, acceptable and safe vaccine.

One of the factors found to have affected the functioning of the unit was dual control. Although the unit was functioning in the Institute, it was an ICMR project and as such there had been lack of rapport between the unit staff and the Institute Director. The Public Accounts Committee of the Lok Sabha had also commented on this sorry state of affairs. A suggestion was made at one stage that the Institute managed by an Association be handed over to the Centre to ensure effective functioning of the Institute and the vaccine unit.

A HUNDRED YEARS AGO MARCH 18, 1926

Anglo-Indians and the Army

Allahabad, March 17: In connection with the appeal put forward by Colonel Gidney in the Assembly on behalf of the Anglo-Indian community, *The Pioneer* says that one of the great grievances of Anglo-Indians has been the bar which has been placed upon their entry into the Army, and this, with various other issues attending the welfare of the community, is *The Pioneer* understands receiving the very earnest consideration of the Government. As a result of the Memorandum presented by the Deputation which recently visited England, Lord Birkenhead has addressed a lengthy note to the Government in India.

The communication, the paper understands, favours the formation of an Anglo-Indian Unit. The community played a part in the War which has not been properly recognised.

Text & Context

THE HINDU

NEWS IN NUMBERS

Cost of treatments sanctioned under Ayushman Bharat

1.73 in ₹ lakh crore. As on February 28, 11.69 crore hospital admissions, worth ₹1.73 lakh crore, have been authorised under the Ayushman Bharat - Pradhan Mantri Jan Arogya Yojana, Minister of State for Health Prataprao Jadhav told the Rajya Sabha on Tuesday. Of these, 4.40 crore admissions were in the last two financial years. PH

Sugar production output of India in 2025-26 so far

26.21 mn tonne. India's sugar production reached 26.21 million tonne so far in the ongoing 2025-26 marketing year, up by 10.5 per cent from the year-ago period, industry body ISMA said on Tuesday. The sugar output so far has exceeded the total net production of 26.12 million tonne in the full 2024-25 marketing year (October-September). PH

Number of deaths in suicide attacks in Nigeria's Maiduguri

23 Coordinated explosions staged by suspected suicide bombers tore through a busy market and other areas in Nigeria's northeastern city of Maiduguri, killing at least 23 people and wounding more than 100 others, police said on Tuesday. The three blasts detonated on Monday evening just after Muslims broke their fast for the Ramadan holy month, authorities said. AP

Candidates registered in Rajasthan's employment offices

22 In lakh. The data, provided by the Directorate of Employment under the RTI Act, shows that as of January 14, a total of 22,21,317 candidates were registered as job seekers in district employment offices across the State. It was further revealed that no candidate was recruited in the government sector through the employment offices in the past five years. PH

CPI(M) workers booked over rally against ex-party leader

500 A case was registered against around 500 CPI(M) workers in connection with a mass rally organised in Kerala, against its former leader G. Sudhakaran, who quit the party recently. The Punnappra Police registered the case, for allegedly causing traffic disruption during the march held on March 14. PH

COMPILED BY THE HINDU DATA TEAM

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On scientific collaborations in BRICS

BRICS functions as a collaborative force aimed at establishing a multipolar world system. Cooperation in science, technology and innovation has been a key agenda for the grouping and has expanded over the years to include socially relevant areas such as energy, water, health and the environment

FULL CONTEXT

Krishna Ravi Srinivas
Sneha Sinha

The BRICS grouping, comprising Brazil, Russia, India, China, and South Africa, is a globally significant collective defined by its substantial contributions to global GDP, scientific and technological capacity, natural resources, and total population. Since its formation, the group has evolved into a prominent international voice, representing countries that seek to challenge and provide an alternative to Western hegemony. BRICS functions as a collaborative force aimed at establishing a multipolar world system. While the group's positions on global finance and macro-economic issues are widely recognised, the depth of cooperation among member states regarding science, technology, and innovation (STI) remains less publicised.

At a time in which global scientific collaboration is increasingly dictated by geopolitical tensions, techno-nationalism, and strategic competition, often manifesting as sanctions and export controls, BRICS assumes a critical role in the global STI landscape. Through this platform, member nations coordinate their strategies, amplify their collective voice in global economic governance, and influence development finance through institutions like the New Development Bank.

These members are also vital contributors to global trade, energy production, and the supply of essential natural resources. The 2022 launch of BRICS+ signalled a move towards a more inclusive forum, fostering development and political cooperation across the Global South to reduce technological dependencies. This collaboration is now a concrete effort to build shared capacities through various framework programmes. The group's current membership has expanded to include Saudi Arabia, Egypt, the UAE, Ethiopia, Indonesia, and Iran.

Cooperation in STI
Cooperation in STI has been a part of the BRICS agenda since its early years. It was formally recognised in 2011 and later consolidated in meetings between senior officials and the BRICS Ministers of Science, Technology, and Innovation. A pivotal 2015 memorandum of understanding established STI as a core strategic pillar, providing the necessary institutional framework and operational signals for collaborative research and capacity-building. This framework has since expanded the scope of cooperation, allowing members to leverage their complementary strengths to address shared development challenges and advance frontier sciences.

The first BRICS Action Plan for Innovation Cooperation (2017-2020) tasked the Science, Technology, Innovation, and Entrepreneurship Partnership (STIEP) Working Group with implementing various programmes. These initiatives focused on entrepreneurship networks, the role of youth and women in STI, and collaborations regarding technology transfer and business incubators. Over time, BRICS has moved from early joint research calls focused on fundamental science toward prioritising innovation and technology transfer.

These priorities are formally identified in annual ministerial declarations. The BRICS Ministers of Science, Technology,



Summit dialogue: World leaders partake in the 17th annual BRICS summit in Rio de Janeiro on July 6, 2025. AP

and Innovation meet once a year to approve and sign strategic documents. Within each member country, one or two lead agencies coordinate these activities, issue calls for proposals, and prepare project lists for approval during the respective country's presidency. For example, during India's chairmanship, the Council of Scientific and Industrial Research (CSIR) and the Department of Biotechnology (DBT) serve as the lead agencies.

A clear emphasis on innovation-driven and technology-enabled ecosystems is evident in recent summit themes and initiatives such as iBRICS and the BRICS Technology Transfer Centre (TTC). The TTC has made notable progress in creating policy frameworks and institutional links for cross-border technology commercialisation. However, despite this progress, large-scale commercialisation of these technologies remains limited.

The focus of BRICS joint research calls has transitioned from basic science and enabling technologies to include more socially relevant areas such as energy, water, health, and the environment. The COVID-19 pandemic accelerated this shift, placing a premium on public health, vaccine research, biosecurity, and digital health. Recent calls have integrated high-performance computing (HPC), advanced materials, information and communication technology (ICT), and space-related applications. Scientific collaboration has strengthened over time, with a growing focus on artificial intelligence and data-intensive science.

While working groups reflect these shared development priorities, their progress varies across different fields. Significant progress is visible in ICT and HPC, highlighted by the establishment of the BRICS Institute of Future Networks, as well as in space cooperation following a 2021 intergovernmental agreement.

Conversely, areas that require heavy infrastructure or are more exploratory, such as mega-science projects and ocean or polar research, have developed slower. The expansion of BRICS has positioned it as a more inclusive platform for knowledge exchange and collaborative research. The 2025 Declaration on AI, elevated artificial intelligence from a sub-theme, to a central pillar of multilateral governance. This declaration outlines a vision for AI governance that is

equitable, inclusive, and development-oriented, moving the partnership towards a strategic collaboration with direct economic and societal relevance. While the 2024-24 Action Plan focused on networking and thematic frameworks, subsequent plans aim to scale projects for greater impact, focusing on biotechnology, climate tech, industrial innovation, and AI. Under India's 2026 Presidency, with the theme 'Building for Resilience, Innovation, Cooperation and Sustainability', the group is positioned to deepen its scientific partnerships. The goal is to leverage expanded membership to strengthen capacities and address challenges like digital divides, public health crises, and climate resilience. However, participation from new members remains uneven; among the most recent additions, only Egypt and Iran joined the call for proposals issued last December. Additionally, the China-BRICS Research Centre on New Quality Productive Forces was recently inaugurated in Beijing. This center serves as an international platform for academic exchange and technological research.

Consequences and concerns

When compared to nations like South Korea, the National Innovation Systems (NIS) of BRICS countries exhibit various strengths and weaknesses. Specifically, gross domestic expenditure on research and development (GERD) is relatively lower across the group, with the exception of China. Research suggests that the gap between BRICS nations and South Korea is wide, and member countries excluding China have significant catching up to do according to various innovation indicators. With the expansion into BRICS+, the innovation systems of new members also require assessment and strengthening. This strengthening could be a priority for BRICS over the next decade, with the potential to eventually replicate these improvements across the broader Global South. As noted by Stanford University visiting scholar Irina Dezhina, the heterogeneity of new members in terms of both economic development and scientific capacity makes it difficult to reconcile differing interests. Consequently, BRICS+ may need to focus on catalysing new "paired links" between specific members. Comparisons to the European Union (EU)

suggest that BRICS could learn from the EU's wide variety of STI programs, as BRICS currently offers more limited options. Further, although competition for funding is intense, the total funding available remains modest.

Experts suggest that these programmes must reach a new qualitative level to effectively respond to major global challenges. Currently, however, research into STI cooperation among BRICS nations is limited, and the existing mechanism lacks a framework for regular study to provide data-driven inputs to member countries.

A way forward

While BRICS countries have achieved significant collaboration, there are questions regarding whether the current framework is sufficient for future needs. A primary concern is the lack of a permanent mechanism to manage STI cooperation. The current system, where the lead role rotates annually with the presidency, is not ideally suited for long-term requirements. BRICS could potentially model a central mechanism after the EU's Horizon Program, establishing a Secretariat to manage funds, issue calls for proposals, monitor progress, and review outcomes.

Developing a few long-term Mega-science Projects could also foster deeper cooperation. The framework for STI cooperation should eventually expand beyond just funding science and technology projects; it should promote research into the governance of STI and the impact of emerging technologies on BRICS+ nations. This would facilitate greater coherence in international treaty negotiations and help build capacity for STI governance.

In conclusion, while STI cooperation within BRICS has progressed significantly since 2015 despite various constraints, there is substantial room for improvement. Making the framework more effective, agile, and credible will enhance the group's legitimacy in the global arena. As the chair of BRICS+ in 2026, India has the opportunity to lead this transition.

(Krishna Ravi Srinivas is Adjunct Professor of Law, Director CoE in AI & Law, NALSAR University of Law, Hyderabad. Sneha Sinha is Consultant, Research and Information System for Developing Countries (RIS), New Delhi.)

THE GIST

BRICS has emerged as a key international voice on global finance and macro-economic issues. However, the cooperation among member states on science, technology, and innovation remains less publicised.

Scientific collaboration among BRICS nations has strengthened over time. Yet, areas that require heavy infrastructure or are more exploratory, such as mega-science projects and ocean or polar research, have developed slower.

While working groups reflect these shared development priorities, their progress varies across different fields. There are questions regarding whether the current framework is sufficient for future needs.

KEYWORD

Moral disengagement and the impact of power

A psychological concept that explains how individuals rationalise immoral and unethical actions by deflecting responsibility and minimising consequences, often enabling those in power to legitimise harmful decisions

Rebecca Rose Varghese

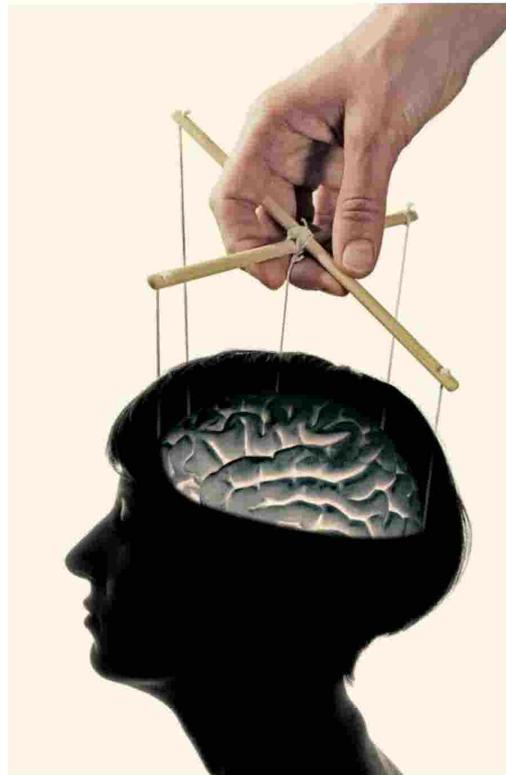
Even with the establishment of norms and laws to maintain morality and ethical behaviour, violence and unethical behaviour have always been part of society. Throughout history, harmful acts, especially when done by those who control the narrative, have rarely been presented as immoral. Instead, they are reframed in ways that make them appear necessary, justified, or even beneficial. There are many examples of this, both old and new. The killing of indigenous populations during colonisation was often described as “civilising” territories. War on weaker or defenceless countries for the purpose of strategic or economic interests is presented as a necessary operation, justified in the name of security or national defence. And, the consequent civilian deaths are labelled as “collateral damage.” Violence or harassment against women and young girls has been and continues to be dismissed as “accidental dalliance” or “minor deviance”, while the behaviour of the women themselves is always questioned, shifting the blame from perpetrators to the victims.

Some of the latest examples of this can be seen in how Artificial Intelligence (AI) systems use people’s data without their consent for training purposes while presenting it as technological progress, and in how companies displace millions of workers with AI, and frame it as development. In many such situations, the perception of the act shifts, depending on who is involved, how it is described, and who holds power.

The concept of moral disengagement
Many theories attempt to explain harmful behaviour, violence and crime by focusing on individual deviance and social structures. One such concept introduced by the Canadian-American psychologist Albert Bandura was moral disengagement. The concept refers to the psychological processes through which individuals rationalise or justify harmful behaviour while continuing to see themselves as moral people.

Developed in the 1990s, the concept explains how people can commit harmful acts without experiencing strong guilt or moral conflict. This can happen in several ways, by minimising one’s responsibility, ignoring the consequences of actions, blaming victims, or convincing oneself that the act serves a greater good. However, moral disengagement does not operate only at the level of individuals. Within power-elite networks, these practices can function collectively. Shared vocabularies and institutional language are used to diffuse responsibility, limit scrutiny, and help sustain authority.

Mechanisms of moral disengagement
According to Bandura, there are several mechanisms through which individuals disengage from moral responsibility. One of these is moral justification, where harmful actions are framed as having a moral purpose, such as protecting national security or defending citizens. Another is advantageous comparison, where an action is made to appear less



GETTY IMAGES

harmful by comparing it to something worse, allowing it to be presented as the “lesser evil.” Displacement of responsibility occurs when individuals or institutions believe that they are not personally accountable for the action, as they are simply following orders, a dynamic often discussed in relation to violence by soldiers.

Similar to this, is the idea of diffusion of responsibility, where accountability becomes spread across actors, such that it becomes difficult to pinpoint who is responsible for the deed. Distortion of consequences involves minimising or ignoring the harm caused by an action, especially when the consequences appear distant or abstract. Finally, dehumanisation and attribution of blame occur when victims are portrayed as less human, dangerous, or responsible for their own suffering, reducing empathy for them, making it easier to justify the immoral action committed against them.

Together, these mechanisms allow individuals/institutions to maintain a positive moral self-image even while participating in harmful actions or decisions. Moral disengagement,

therefore, does not mean that people lack morality; rather, it shows how moral reasoning can be cognitively reorganised to make harmful conduct appear acceptable.

Euphemistic labelling and Media Framing Theory

One other key mechanism that enables moral disengagement through language is euphemistic labelling. Here, harmful actions are described using sanitised or technical language that makes them appear less severe. By replacing morally charged words with neutral terms, the emotional weight of an action is reduced, making it easier to justify. For instance, phrases such as “collateral damage” instead of civilian deaths or “enhanced interrogation” instead of torture transform violence into what appears to be a technical or bureaucratic procedure.

Language has the potential to become even more powerful when it is amplified through the media. Media institutions play a crucial role in shaping public perception, as they can influence how events are interpreted by choosing particular words, narratives, and frames.

As discussed in the Media Framing Theory developed by Canadian sociologist Erving Goffman, the way an issue is presented can shape how audiences understand its causes, consequences, and moral implications. In practice, media framing can sometimes support the interests of political elites and powerful institutions by softening or obscuring the reality of their harmful actions.

In discussions surrounding the cases of child rape and trafficking by influential people like Jeffrey Epstein and other political leaders, many news reports used terms such as “underage girls” or “young women”. Such phrasing softens the idea of abuse and violence by framing it as sexual misconduct rather than child rape. Phrases like “sex with a minor” also imply mutual participation, obscuring the coercion and power imbalance involved.

Similarly, in this case, bureaucratic language was used that often referred to terms like a “network,” “client list,” or “recruitment,” which made the operation sound like a corporate enterprise rather than an organised system of sexual exploitation.

Euphemistic language is also common in military contexts. In discussions of military operations in places such as Gaza, terms like “airstrikes,” “collateral damage,” or “security operations” can replace more direct descriptions such as bombing residential areas or killing civilians. Technical and euphemistic language reframes violence as strategic or procedural rather than highlighting human suffering, with the neutral nature of the terminologies, often reducing the emotional and ethical impact of a situation.

Moral disengagement and power

Moral disengagement becomes particularly significant in systems of power. Large institutions, including states, militaries, corporations, and bureaucracies, often operate through complex hierarchies and specialised roles. Within such systems, responsibility can easily become fragmented.

Those at the top of a hierarchy may justify harmful policies as necessary for national security, economic growth, or social order. Institutions and individuals within bureaucratic levels may diffuse responsibility by pointing to procedures or institutional rules. Media institutions may also shape public perception by softening or obscuring the reality of harmful actions. Civilians consuming such information may be limited to a neutral understanding of the situation due to the obscured nature of the information presented to them, and may therefore comply.

Key takeaways

Bandura’s theory helps explain how individuals or institutions continue to propagate violence by reframing and disengaging from moral standards through cognitive and linguistic mechanisms, instead of openly rejecting morality.

Recognising these behaviours becomes crucial if there is any hope of resisting and challenging individuals and institutions that rely on moral disengagement to sustain themselves. Understanding these mechanisms enables people to question such systems by demanding accountability, insisting on transparency, and using language that accurately reflects the reality of a situation. Thus, the concept becomes especially important in the contemporary geopolitical context, as it helps people better navigate the world around them and critically question the narratives, policies, and decisions presented to them. (Rebecca Rose Varghese is a freelance journalist.)



FROM THE ARCHIVES

Know your English

S. Upendran

“I understand that Dev Anand is extremely happy that Yuktha has won the Miss World title.”

“Why should he be happy?”

“He is planning to remake his old hit, ‘Teen Devyani’. This time he is going to cast Aishwarya Rai, Sushmita Sen, and Yuktha. The three beauties from India.”

“Who is going to play the hero?”

“What a silly question! The evergreen Dev Anand, of course! And if we turn a Nelson eye to the problem of...”

“...Nelson eye? Who is this Nelson you are talking about?”

“Horatio Nelson. He was an Admiral in the English Navy in the early 1800s.”

“Oh, that Nelson. I remember reading about him in one of the history lessons. Wasn’t he the man who destroyed the French and Spanish fleets in the Battle of Trafalgar?”

“That’s right. Nelson died in that battle.”

“He was blind in one eye, wasn’t he?”

“He was blind in his right eye. And that’s what the expression ‘to turn a Nelson eye’ to something means – to turn a blind eye to something.”

“But what’s the connection? I don’t...”

“...there’s a story behind that. You see, during one of the many battles that Nelson fought, one of his superiors signalled from another ship for Nelson to withdraw. When the sailors on Nelson’s ship pointed this out to him, Nelson placed a telescope on his right eye – his blind eye. He then told his men to continue fighting as he had not seen a signal ordering him to withdraw.”

“So Nelson wasn’t good at following orders, was he?”

“I guess you could say that! He used to turn a blind eye to them.”

“And in Nelson’s case, he literally turned a blind eye to them.”

“When you turn a blind eye to something, you pretend not to see something, even though you already have. Here is an example...”

“...let me! Let me! When I informed the Principal about how the students cheated in the exams, he turned a Nelson eye to the problem. Can I say that?”

“Yes. My boss has been turning a Nelson eye to the corruption that has been going on for several years now.”

“Most Indians have turned a Nelson eye to the problem of corruption.”

“Yes, that’s the sad part. We seem to wink at the...”

“...wink at? What does it mean?”

“When you ‘wink at’ something that someone has done, you pretend not to see it, even though the person may have done something terribly wrong.”

“Even though he/she may have done something illegal?”

“I guess you could say that. Here’s an example. The party chief refused to wink at the corruption charges levelled against the candidate.”

“When the former Minister’s house was raided, they found that he had several foreign accounts. The income tax officials were unwilling to wink at the large sums of money.”

“My cousin’s wife buys new curtains every two months.”

“Doesn’t your cousin say anything to her?”

“No, he merely winks at his wife’s extravagance.”

Published in *The Hindu* on December 14, 1999

THE DAILY QUIZ

Here is a quiz on events that happened on March 18

Sindhu Nagaraj

QUESTION 1

On this day in 2000, this leader of the pro-independence movement that sought statehood for the Republic of China (Taiwan), was elected president of Taiwan, breaking the Nationalist Party’s 55-year rule. Name the leader.

QUESTION 2

This American singer-songwriter and guitarist who was a leading and influential performer in rhythm-and-blues and rock-and-roll music, died at age 90 on this day. Name the musician.

QUESTION 3

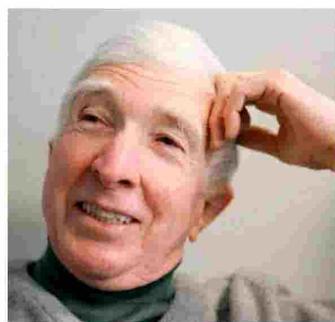
In 1990 on this day, in what was considered the world’s biggest art heist, two men pretending to be police officers stole 13 works, including paintings by Rembrandt and Johannes Vermeer. This happened in which country?

QUESTION 4

In 1965 on this day, which Soviet cosmonaut became the first man to walk in space?

QUESTION 5

Identify this British Prime Minister (May 28, 1937 – May 10, 1940) whose name is identified with appeasement toward Adolf Hitler’s Germany. He was born on this day.



Identify this American author who was born on this day in 1932. REUTERS

Questions and Answers to the previous day’s daily quiz:

- U.S. President Harry S. Truman referred to his country’s involvement in the Korean War as: **Ans: Sponsor of United Nations police action**
- After the 1964 Gulf of Tonkin incident, the U.S. Congress authorised this President to use military force in Vietnam through a joint resolution. **Ans: Lyndon B. Johnson**
- The NATO bombed this country during the Kosovo War. The air campaign left over 500 dead. Also, does the NATO commit to UN Charter? **Ans: Yugoslavia; Yes**
- The ongoing Russo-Ukrainian war began in 2014. In which year did Vladimir Putin launch a full-scale invasion, and what term did he use to describe the escalation? **Ans: 2022; Special military operation**
- The post-9/11 Authorisation for Use of Military Force (AUMF) resolution enabled the War on _____. The law has been used by successive U.S. leaders to initiate ‘counter-terror’ activities leading to more than 4.5 million deaths. **Ans: terror**
Visual: President Barack Obama took the U.S. into war against X (country) as part of a NATO-led coalition. Identify X, as well as the de facto military leader pictured in the mosaic who was overthrown and later killed. **Ans: Libya; Muammar Gaddafi**
Early birds: K.N. Viswanathan | Lalchand Bhutani | Pulkit Sathe | Tito Shiladitya | Sukdev Shet

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

Word of the day

Debilitate:
make weak

Synonyms: drain, enfeeble

Usage: Constant stress can debilitate your immune system.

Pronunciation:
<https://newsth.livest/zb24fs>

International Phonetic Alphabet: /dɪˈbɪlɪteɪt/

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

the hindu businessline.

WEDNESDAY - MARCH 18, 2026

Scenario planning

Centre faces massive challenge if war doesn't end soon

The Centre's move to carve out a ₹1 lakh crore Economic Stabilisation Fund from current year's Budget is timely. The Finance Ministry has also done well to draw up various scenarios on the impact of the war, now in its third week, and place these before Parliament. As for the first, the Fund will be created out of cash inflows as well as unspent allocations (or savings) of ministries, as FY26 draws to a close in a couple of weeks.



The Fund forms part of the ₹2.8 lakh crore supplementary demand for grants passed by the Lok Sabha a few days ago. The additional ₹1.8 lakh crore is directed towards increasing subsidy on food (by ₹23,641 crore under PM Garib Kalyan Yojana) and fertilizer (by ₹19,230 crore), besides defence outlay. The additional outlay for fertilizer subsidy is likely meant to absorb a war-induced increase in prices, while food subsidy might have been beefed up to deal with any livelihood distress and inflation—a recognition that the war could hit the economy in unexpected ways.

In an exercise in realistic stocktaking, Chief Economic Advisor V Anantha Nageswaran has laid out possibilities before the Standing Committee on Finance, whose report was tabled in Parliament on Tuesday. He has said that if price of oil stays at \$130 a barrel for two or three quarters, retail inflation will rise to 5.5 per cent and real GDP growth will be down to 6.4 per cent in FY27, against 7.4 per cent this fiscal. Significantly, the current account deficit (CAD) will rise from the present level of 1.2 per cent to 3.2 per cent of GDP and the fiscal deficit to 4.4 per cent to 5.6 per cent. At \$90 a barrel for a sustained period, however, the current projections of 7-7.4 per cent growth, 2 per cent inflation, a CAD of 1-1.2 per cent of GDP and a fiscal deficit of 4.4 per cent are likely to hold. A spike in CAD will pose major challenges to monetary authorities as well. It could occur on account of an impact on remittances, investments and exports, even as imports rise. But it appears that the Centre is in a position to absorb crude price increase up to \$90 a barrel without passing it on to the consumer, the Fund working as a cushion.

The war will have stagflationary impact. Besides higher commodity prices for industrial oil and gas users, inputs and intermediates will turn costly. Exporters and MSMEs, generally speaking, can be hit by global headwinds and disruption of supply chains and working capital finance. Apart from controlling energy prices, the Centre can take a leaf out of the Covid playbook and roll out an emergency credit guarantee scheme. The Fund's corpus can be enhanced if required, to stabilise prices and provide credit support. Monetary policy will have to be accommodative to the extent possible. With good macros and reserves, there is every reason to believe that the worst-case scenario may not come true, even if one is prepared for it.

OTHER VOICES.

The Guardian

If the US is winning, why ask Nato for help?

The 21st century would like you to know that he is winning the war with Iran. So comprehensively, in fact, that he now needs Nato's help. The western alliance, he warns, will have a "very bad" future if its members refuse. The US defence minister had a brisk reply: this is not our war. Meanwhile, tankers pile up outside the Strait of Hormuz as Britain promises, in an understated way, to keep "looking" at its options. Mr Trump has found out that starting a war without a coalition of the willing is easier than finishing one with it. He is signalling that things will get worse unless Tehran negotiates. Bad things have already happened. On the charge sheet is the sinking of an Iranian frigate in international waters and the bombing of a school that reportedly killed 168 people, mostly young girls. (LONDON MARCH 18)

GLOBAL TIMES

China's 'intrinsic stability' wins global trust

"The 21st century is more likely to belong to Beijing than to Washington." A joint poll released on March 15 by the US' Outright Politico and the UK polling firm Public First shows that citizens of US "big four stance alliances"—Canada, the UK, France, and Germany—consider that "it is better to depend on China than the US," with younger generations holding particularly positive views. In recent days, several US media outlets also discussed the phenomenon of "China-maxing", even suggesting that this trend could bring about deeper transformations in the modern American workplace. Together, these pieces of information make the puzzle of shifting Western perceptions clearer. This multifaceted survey is regarded as "highly accurate". (BEIJING MARCH 17)

AJAY SRIVASTAVA

Indian industry has long argued that the EU's average tariffs of about 12 per cent put Indian products at a disadvantage, especially when key competitors enjoyed duty-free access—Bangladesh under the EU's Generalised Scheme of Preferences and Vietnam under its free-trade agreement with the EU. With the EU now agreeing to eliminate tariffs for this sector, the question is whether India's exports to the EU will surge.

The honest answer is: exports will rise as tariffs fall, but not dramatically on their own. The EU is a demanding and complex market, and achieving strong, sustained growth will require several additional actions. Let us understand with the example of Japan.

The India-Japan FTA shows why tariff cuts by partner countries alone do not guarantee export growth. Japan, like the EU, is a developed economy that imports most of its garment requirements. When the India-Japan FTA came into force on August 1, 2011, Japan eliminated its 10 per cent duty on apparel from day one at India's request, raising hopes of a sharp rise in Indian garment exports. That surge never came.

Japan imported about \$327 million worth of garments and made-ups from India in 2011. By 2024, imports had fallen to around \$302 million, leaving India with barely a 1.1 per cent share of Japan's garment imports. The problem was not tariffs, but readiness. Many Indian suppliers were unable to meet Japan's demanding standards on quality, process discipline, and consistent, large-scale production.

The European Union is a key market for India's textile and apparel exports. In FY2025, India exported \$37 billion worth of textiles, garments and made-ups globally, of which the EU accounted for \$7.3 billion, or 19.8 per cent. The EU is especially important for garments, taking 28.4 per cent (\$4.6 billion) of India's exports in this segment. To increase exports, we need to focus on the following actions.

FIRM-LEVEL INITIATIVES
Exporters to the EU know that producing a good-quality garment alone is not enough to access the market. European buyers require production in factories that follow strict, auditable processes and comply with multiple regulatory and buyer standards. These include EU textile labelling rules, REACH chemical regulations, emerging sustainability and traceability requirements, and buyer-mandated certifications such as ISO, SA8000, GOTS/GRS, and OEKO-TEX®.

Meeting these requirements—through auditing, testing, traceability systems, REX registration, and worker training—typically costs ₹10-30 lakh in



How to get a bigger pie of the EU garment market

MEASURING UP. Zero tariffs apart, focus on quality and synthetics and strengthening the weaving and processing sector will help

the first year. While organised exporters can manage this, it remains a barrier for smaller units.

Winning the speed game: For best results, Indian factories must also upgrade to become fast-fashion-industry (FFI) compliant, where most global sourcing now occurs. India has about 1,200 FFI-compliant factories, mainly in cotton, with far fewer in synthetics. Nearly 80 per cent of exporters still miss efficiency benchmarks such as Standard Allowed Minutes (SAM), limiting scale and speed. Expanding FFI-compliant capacity—especially in synthetics—is critical to winning orders from major buyers like Walmart, Zara, H&M, Gap, and online retailers such as Amazon and Zalando.

From cotton comfort to synthetic competitiveness: Synthetic and winter-wear products—such as sportswear, athleisure, fast fashion, and cold-weather clothing—now make up nearly 70 per cent of global garment demand. India missed this shift by staying largely cotton-focused, leaving factories underused outside the spring-summer season.

The result is a wide gap: while China exported about \$113 billion of garments last year, Bangladesh \$51 billion, and Vietnam \$39 billion, India exported only about \$16 billion. Limited focus on synthetics and winter-wear is a key reason.

The government has now removed a major constraint by abolishing Quality Control Orders (QCOs) on more than

Setting up design studios in Europe to co-create collections and respond quickly to trends can further strengthen competitiveness

20 key synthetic inputs such as polyester and viscose fibres and yarns, reducing costs and improving access to global raw materials. With zero tariff access under the FTA, industry must expand into synthetic, blended, and winter-wear segments to achieve meaningful export growth.

From contract manufacturing to brand power: Even India's largest garment exporters, including billion-dollar firms, mostly operate as low-margin suppliers to global brands. This limits profits, bargaining power, and forces them into constant price competition. It is time for India's leading garment makers to move up the value chain by building their own designs, brands, and retail identities. By investing in in-house design teams, trend analysis, fast sampling, and small-batch production, firms can earn higher margins and reduce dependence on a few large buyers.

Setting up design studios in Europe to co-create collections and respond quickly to trends can further strengthen competitiveness. Competing on design and speed—not tariffs alone—is the key to long-term success.

GOVERNMENT LEVEL INITIATIVES
Over the past year, the government has fixed key weaknesses by removing QCOs on major synthetic inputs, easing labour rules to allow factory expansion and year-round operations, and correcting the inverted GST structure. Together, these reforms finally give India's synthetic garment industry a real shot at global competitiveness. However, to fully use the India-EU FTA opportunity, the following additional action is needed.

Strengthen weaving and processing sector—the weakest links in the textile value chain: India is a major yarn exporter but accounts for only 6 per cent of global fabric trade because its weaving and processing units remain small,

informal, and outdated. Invest in large, modern, integrated weaving and processing parks to convert its yarn strength into value-added global fabric competitiveness. China's textile revolution started with this.

Do not incentivise the export of fibre or yarn: Current export rebates push India to ship fibre and yarn abroad at lower prices, starving domestic garment makers of affordable inputs. India should prioritise value-added exports, not raw materials.

Overhaul procedures: Advance authorisation allows exporters to import inputs duty-free, but rigid rules—such as matching fabric type, shade, and consumption with extreme precision—make it cumbersome. Bangladesh solved this by using value-based import entitlements, letting firms import inputs up to a fixed share of export value. India should adopt a similar approach.

Finally, extend the RoSCTL (Rebate of State and Central Taxes and Levies) scheme for garments and made-ups for at least five years to provide stability and confidence for long-term investment, as exporters need predictable policy support to plan capacity expansion, technology upgrades, and new product lines aligned with global demand.

The aforesaid action plan applies not only to boosting India's garment exports to the EU, but also to all labour-intensive exports to developed markets.

We have discussed for decades about upgrading garment and other labour-intensive sectors, yet on the ground India continues to lose market share to smaller competitors such as Vietnam and Bangladesh—late entrants that moved faster with clearer strategies, compliance readiness, and supply-chain efficiency. If India is to reclaim its position in global trade, there may never be a better time to seize the opportunity.

The writer is Founder, GTRI

Will foreign banks exiting UAE home in on India?

India has seldom been favoured as a regional headquarters. Better urban governance, currency convertibility could change this

Brijeshwar Singh

Energy shocks and a fall of remittance from the Gulf might occupy the energies of our policymakers for much of this year. These large issues, however, could lead to overlook the banking shock in the UAE.

The UAE has more than a trillion dollars in banking assets, which are double the size of its GDP. India's GDP, at nearly \$4 trillion, is eight times the UAE's but our banking assets (at less than \$4 trillion) are only about three times the UAE's. The deep financialisation of the UAE is largely because it is an open economy that operates as a regional financial centre. The leading names operating in the advanced include Citibank, JP Morgan, HSBC, Credit Agricole, BNP Paribas and our own Bank of Baroda.

With oil, hospitality and tourism, trade and real estate sectors facing difficult times, the UAE banking sector will take a massive hit. International banks have largely shut down and pulled out their staff. They are seeking safe havens—for a change this means physical safety and not tax-free status. While GIFT City may beckon these

banks, it is unlikely they would move there. GIFT City is designed for the local investor seeking to invest in foreign assets, which is quite a different role. Also its location, in Gandhinagar, is not too attractive a place to live in and there are problems of talent attrition as well. It's more likely that these banks will prefer established financial centres like Mumbai or Chennai, if given some incentives.

India is not going to be a first choice for a Middle East headquarters. Even as a headquarters of an Asia level regional office India lags. WHO is one of the few international organisations to have a regional office here.

INDIA BYPASSED

It is somewhat surprising that the practice of bypassing India for a regional office has hardly changed in half a century. New excuses are found for the avoidance, such as Bengaluru's terrible traffic, Mumbai's overcrowding, Kolkata's dilapidated state and Delhi's life-threatening pollution. These are a reflection of poor urban governance more than anything else.

It is sometimes said in jest that the Minto-Morley reforms were our last serious look at urban governance. Municipal bodies (and district boards)



WELL STACKED. The UAE has more than a trillion dollars in banking assets

then had the power to hire and fire staff rather freely—a much curtailed power a century later. In practice, few municipal politicians graduate to higher levels.

However, it is noteworthy that Chandigarh, which is a Union Territory, has escaped many urban problems. While there is no space for federally administered cities in our Constitution, Mumbai has expanded up to the Gujarat border near Dahanu. The Ahmedabad-Mumbai-Pune coast is turning into a giant megalopolis, with acutely divided political authority and no overarching planning body. Foreign capital and foreign banks alike prefer stable, low risk urban environments. And federally administered cities could

be a possible solution. Any relocation of banks from the UAE will become attractive only if our policymakers address the issues of currency convertibility and lowering of import tariffs. What is striking is that while the earliest concept papers on Bombay as a financial centre (like the Lovraj Kumar note) argued for trade liberalisation, tax incentives and limited currency convertibility, subsequent policy took the slow path. Each component was considered in isolation without any synergy. Our SEZs have no significant tax advantage since the introduction of MAT and the abolition of Section 10AA. GIFT City is not linked to a free port and it has no tariff advantages.

China used a dual currency system of both the Yuan and the Renminbi to gradually advance currency convertibility, and in the interim it used the tax haven of Hong Kong to access foreign capitals. This path may not be feasible for us.

However, it is never too late to begin planning for a regional financial centre when our metropolises are mutating into megalopolises and our SEZs still have land to spare.

The writer is an economist who was formerly additional chief secretary of Tamil Nadu

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

Hurdles to natural farming

Apropos 'Why a transition to natural farming is a necessity' (March 17), while it is essential to move over to natural farming from the current fertilizer and pesticide intensive cultivation, there are several hurdles that confront this transition. Farmers need to be assured and convinced about the long term benefits that the shift would bring, as the natural farming is more labour intensive, but yields also could dip in the initial years when bio-inputs replace the chemical inputs. A few farmers may be chosen in each and

every village in the country and convinced to take up natural farming by making them aware of the advantages of natural farming and providing incentives, extension services and market access after harvesting. In the initial years the government may procure the entire organic produce so as to build trust among farmers about natural farming. The success of these farmers will inspire other farmers to take up natural farming. **Kosaraju Chandramouli** Hyderabad

The price of war

Apropos 'Nervous Republicans' (March 17), the war on Iran has caused disruption across the globe in all spheres of activities. Oil and gas continue to be critical energy sources for everyday life despite availability of other renewable energy sources. It appears that both Israel and the US failed to gauge the impact the conflict would have on non-participating countries. Many nations such as Japan and Australia have expressed disinterest in sending their forces to support US actions in weakening Tehran's stronghold in

Hormuz Strait. It is time all countries embed en masse to the warring nations to end the conflict. **RV Baskaran** Pune

Towards electric cooking

Apropos 'Electric kitchens' (March 17), the LPG squeeze is a timely reminder that a basic household necessity still rides on volatile imports and distant conflicts. The current disruption should be used to accelerate electric cooking, not merely to patch supply-lines. Induction and other e-stoves

convert more input energy into usable heat, and when priced sensibly they can reduce the recurring burden of cylinder subsidies. A pragmatic transition needs three quadrants: time-bound support for quality, efficient stoves; clear standards to keep unsafe, low-grade appliances out; and planning for peak electricity demand through time-of-use tariffs, rooftop solar pairing, and storage where feasible. Crisis-driven substitutions should become deliberate resilience. **Veda Chidanand** Bengaluru

Futility of cabotage law

Protection for Indian shipping is not beneficial

Jose Paul

The English word "cabotage", which has a Spanish origin, means trade or navigation in coastal waters and the right of a country to operate exclusively in coastal trade.

Such protection of national shipping under cabotage is designed to promote and protect domestic shipping and like India, the US, the UK, Japan, Australia, China and many other countries have reserved their coastal shipping to domestic services.

However, the Ministry of Ports, Shipping and Waterways, on January 21, 2026, scrapped three general orders issued in 2018 which had permitted foreign flag vessels to carry export/import containers meant for transshipment, empty containers for repositioning and select commodities on coastal routes without obtaining a licence from the Directorate General of Shipping.

For the last eight years foreign container shipping lines have availed themselves of this facility, and from April 21 this relaxation will cease to exist.

The government decided in 2018 to grant relaxation of cabotage law to foreign flagged ships only for container trade and that too for transshipment trade. The share of container traffic in the total cargo handled at Indian ports comes to about 22 per cent (352 million tonnes out of a total of 1.603 million tonnes).

Of this only about 25 per cent constitute transshipment trade, and, therefore, in actual practice the relaxation of cabotage law benefited only to less than 8 per cent of India's total port traffic. Rolling back the relaxation of cabotage law for transshipment trade could result in diversion of Indian origin cargo to established regional hubs such as Port of Colombo, Port Klang, Tanjung Pelepas, Jebel Ali, Singapore which already handle a large part of India's transshipment volumes.

Does India have enough container vessels to serve the coastal transshipment trade?

India has about 30 feeder container ships with a total carrying capacity of about 56,000 TEUs. India has a coastline of 7,500 km with 12 major ports and at least about 20 commercially significant non-major ports. Indian container ship fleet is inadequate to service the requirements of Indian shippers efficiently and cost effectively.

Domestic container lines,



INDIAN SHIPPING. In the clutches of protection

under cargo reservation, tend to keep freight rates high. A liberalised environment, which fosters greater competition, results in lower freight rates.

The government is pinning it hopes on the recently established "Bharat Container Lines" to make an impact in the global container shipping market.

This is unlikely to happen in the near future due to the formidable entry barriers to the market.

The seven global giants in container shipping — Mediterranean Shipping Company, Maersk Lines, CMA CGM, COSCO Shipping Line, Hapag-Lloyd, Ocean Network Express and Evergreen Marine have a huge fleet strength and control almost 78 per cent of the global container shipping market.

REFORMS IN CABOTAGE LAW

In the UK foreign flag ships are engaged in domestic shipping. Australia which relies on shipping for transport of 99 per cent of international trade maintains cabotage rule but foreign lines can apply for license to move domestic cargo. Indonesia has relaxed cabotage law for foreign flagged vessels that are serving Indonesia's oil and gas sectors.

In 2009 Malaysia relaxed its cabotage laws to permit foreign lines to carry domestic cargo. New Zealand deregulated coastal shipping and despite repeated efforts to reintroduce cabotage law such efforts have not succeeded. Economic logic suggests that restrictive practices stifle growth resulting often in unfulfilled potential.

Indian container shipping lines cannot afford to remain always under the umbrella of statutory protection and in the comfort of cargo reservation.

They should be able to compete with foreign shipping lines on service quality, pricing and operational performance.

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



A VASUDEVAN

The Middle East crisis that emerged at the end of February has added an uncertainty that is far more severe than any other event in the recent past. No one knows how long it will last — days, weeks or months, even after the completion of a fortnight since the eruption of the crisis. India's economic and political diplomacy and commitment to the ideology of peace with dignity, referred to often as multi-pluralism, is under severe threat.

One of the major consequences of the crisis is that prices of oil will go up and trigger inflation and the expectations thereof. This should worry India since it could disrupt the projections made in February of growth and inflation for the fiscal 2026-27.

Should India merely reset the economic projections or wait for some more time? The best option available is to wait and watch for the off-mentioned price of oil to spike to \$100 and over to even \$150 per barrel. This is not something that the world has not experienced earlier.

In fact, the world has seen \$100 per barrel and over of the marker oil, the Brent Crude, in at least seven calendar years since the global financial crisis of 2008. In a majority of these years, the main cause of such spikes involved Iran and China.

SUPPLY DISRUPTIONS

India should be more worried about the supply disruptions in respect of oil as well as critical minerals, and other goods including steel, electronic goods, chips, batteries, and edible oils as well as pulses. Identification of these commodities is not a serious challenge, though. What would be more worrisome is about how to build up inventories of these commodities, in case the crisis stretches for three to six months from now.

Superimposed on this is the need for building up inventories of defence equipment, including drones, missiles and more importantly radars in case the crisis triggers hostile activities from those not well disposed to the country.

India does not have, from most accounts, a sound well-tested inventory



Policy action in times of geopolitical crises

CRISIS MANAGEMENT. It is time to think of an inventory policy to stock up critical goods in times of supply disruptions, arising out of political factors

policy to take care of such an uncertainty. Trade deals concluded with some of the countries and a cluster of the European Union countries (EU) could help procure the commodities in question to a significant extent.

Will this be enough to take care of inventory costs? And who will bear such costs? Should we construct first a base scenario of maintaining inventories that would last for at least six months and build up more scenarios, if need be, as new developments emerge? As of now, there are no clear answers to these

Apart from oil, building up an inventory of critical minerals, and other goods including steel, electronic goods, chips, batteries, and edible oils as well as pulses is the challenge, especially if the war prolongs

questions. And the opportunity costs could be high if the decisions about the inventory policy and inventory dynamics are not taken expeditiously.

The Indian authorities should not treat the crisis lightly and tinker with the overall situation of supply of goods and services in an ad hoc manner. They should also not hurry to reset the projections of February 2026 for the next fiscal year. Instead, they need to work out fiscal, monetary and governance strategies that necessarily involve a reform agenda, to achieve the projected numbers. This is the only way expectations of economic units (households, corporates, small and informal enterprises and government entities) about India's economic prospects could be influenced towards achieving the set goals.

MACRO POLICIES

This does not mean that there will be no volatilities in our interest rates, liquidity situation, exchange rates of most major

currencies, gold and other precious goods, stocks, and fiscal receipts. After all, the uncertainties at the global level are so sharp that none of the economic variables are or can be pre-determinable.

Volatilities have to be managed through coordinated strategies for policy action. And what is important is to ensure that all the tiers of government at the Centre and States are committed to the tasks that lie ahead. The Centre should take the initiative right away.

Hopefully, issues such as the scarcity of cooking gas and fertilizers that are presently the major concerns of commercial kitchens, households and farmers would not overwhelm the governance mechanisms at all tiers of the government and disrupt the commitment to the pursuit of the current macro policy framework.

The writer is a former Executive Director of the RBI and currently an independent economic analyst. (Through The Billion Press)

thehindubusinessline.

TWENTY YEARS AGO TODAY.

March 18, 2006

Suzlon to buy Belgian co Hansen for Rs 2,511 cr

Wind energy major Suzlon Energy Ltd has agreed to buy Hansen Transmissions International NV, a leading wind turbine gearbox manufacturer in Belgium for euro 465 million (Rs 2,511 crore) in an all-cash deal.

VisualSoft, Applabs, eSolutions merger plan falls through

The proposed amalgamation of IT services company Visual Soft Technologies Ltd with Applabs Technologies, a software testing solutions provider, and eSolutions, has fallen through. The scheme of amalgamation charted out by the board of directors, at a meeting held on October 27, 2005, has failed to materialise and the companies have decided to pursue their interests independently.

NTPC plans to bid for gas blocks under NELP-VI

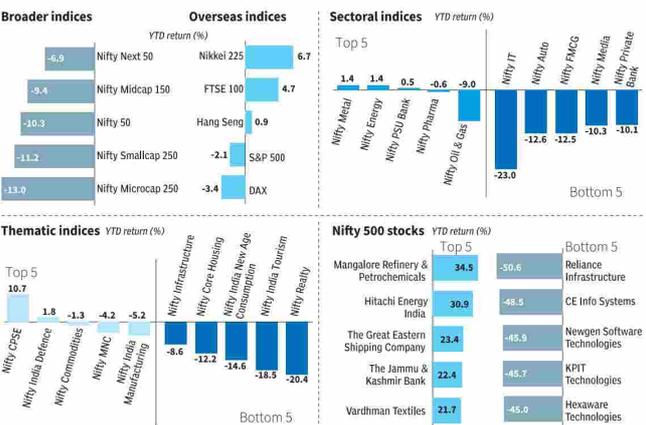
Having bagged its first oil and gas block in the fifth round of bidding under the New Exploration Licensing Policy, NTPC Ltd plans to take forward its diversification into the oil and gas exploration business with aggressive plans to bid for more acreage in domestic blocks under the recently announced sixth round of bidding under NELP-VI.

STATISTALK.

Compiled Dhruvvel Gunasekaran | Graphic: Visweswaran V

Inside India's equity market rout in 2026

Domestic equity markets have been in correction mode since the start of 2026, driven by a confluence of global shocks and domestic pressures. Year-to-date, as of March 16, 2026, the Nifty 50 TRI has declined 10%, while the Nifty Midcap 150 TRI and Nifty Smallcap 250 TRI have fallen 9% and 11%, respectively. Indian equities remain under pressure due to stretched valuations and persistent FII outflows. US tariffs, a weak rupee, IT sector underperformance, and geopolitical tensions have added to the strain. However, SIP flows offer a silver lining. Here is how various market segments have fared so far this year.



Source: ACEFIM YTD as of March 16, 2026 Total return variant is considered

On businessline.in

Has flexible inflation targeting worked?

The FIT framework has had less influence on limiting food inflation and its volatility, point out Abhimanyu Das and Smita Roy Trivedi

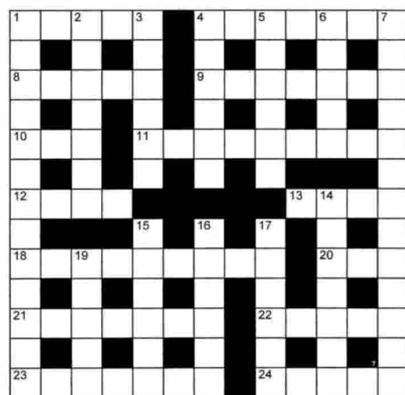
Petroyuan is a geopolitical signal, not a monetary system

The yuan is constrained by lack of capital account convertibility and PBOC control on exchange rate. So the dollar's domination is set to continue, says Ram Singh

Press Note 3 tweak: A significant FDI policy reset in five years

The amendment is a boon for global funds as it lends predictability in the foreign investment regime, say Vivaik Sharma and Muditi Burad

BL TWO-WAY CROSSWORD 2638



EASY

- ACROSS**
- Leaves car (5)
 - Withstands (7)
 - Lid (5)
 - Anguish (7)
 - Samovar (3)
 - Aardvark; woodchuck (6-3)
 - Fencing sword (4)
 - Supreme, roughish (4)
 - Holds back, checks (9)
 - Animal mother (3)
 - Counterpart to tenon (7)
 - Habituate; burn in (5)
 - Think guilty (7)
 - Old pear-shaped instruments (5)
- DOWN**
- Surroundings for paintings (7,6)
 - Influct injury in retaliation (7)
 - Spray-like ornaments (6)
 - Food allowance (6)
 - Bound (6)
 - Cardinal point (5)
 - Large, heavy knocking implements (6-7)
 - Inner, last retreat (7)
 - Laud (6)
 - Not speaking (6)
 - Act of watching, observation (6)
 - Boils, ulcers (5)

NOT SO EASY

- ACROSS**
- Leaves vehicle for Hyde and St James's (5)
 - Doesn't give in but is involved in relaxation periods (7)
 - Such the spy's story that newsman will report on (5)
 - Influct of pain, wrong at law, is certain not to start (7)
 - One is told one will deservedly get such a repository (3)
 - The aardvark goes to earth, the pig! (6-3)
 - Keep enemy turning to reveal the sword he wields (4)
 - Keystone feature every building designer begins with (4)
 - Checks precipitation in the times between notes (9)
 - Maternal equine will keep it back using bank (3)
 - It's misplaced in additional quantity needed for lock (7)
 - Harden one that is about to run back (5)
 - One will think him guilty if he sets cup rattling (7)
 - Cements instruments with strings (5)
- DOWN**
- See me far gone in films, such being the surroundings (7,6)
 - Retaliation taken by the right even, for example, giving up (7)
 - Pieces of mint one grips awkwardly with top of scissors (6)
 - Allowance out the proportion to the North (6)
 - Season when mast will crack (6)
 - Some States of the US, hot and bothered (5)
 - Giant nutcrackers found on shelf among those who pretend (6-7)
 - Field-work the Sappers will do, but get wrong (7)
 - Be complimentary if one can aspire to it (6)
 - Posted the Italian inside without saying anything (6)
 - Observation made as pile is crumbling (6)
 - Nasty places seen thus, repose being inconclusive (5)

SOLUTION: BL TWO-WAY CROSSWORD 2637

ACROSS 1. Socle 4. Dervse 8. Imperceptible 10. Niger 11. Lead 12. Wing 16. Piece 17. Infalibility 19. Galloon 20. Minor
DOWN 1. Scintillating 2. Cop 3. Errand 4. Dreage 5. Satire 6. Rebellion 7. Evening prayer 9. Beautiful 13. Apollo 14. Legion 15. Tedium 18. Inn

OUR VIEW

GUEST VIEW



Fertilizer reform: Strike while the prices are hot

As urea and gas get dearer, relief from the fiscal cost of an outdated subsidy regime is one reason to adopt direct transfers instead. Climate and farm output benefits are another

On 7 January, *Mint* made a case for reforming India's highly inefficient regime of fertilizer production, pricing and distribution, and for switching over from product subsidization to income support for farmers. This imperative has since been sprung centre-stage by a war in West Asia that has disrupted our imports of urea and its feedstock gas, both of which form large shares of domestic usage and have seen global prices flare up. The fiscal burden that this imposes on the government should be enough to trigger action. The longer we retain the *status quo*, the worse this war's likely impact will be through inflated import bills, which look poised to enlarge rapidly if peace proves elusive. In general, India privileges the fertilizer industry for allocations of natural gas, but right now, its allotment has been slashed by 30%, while prices have been held firm, as the Centre prioritizes piped natural gas supply to homes for cooking and the compressed kind used by vehicles as a fuel.

In recent times, half of India's natural gas requirement has been met by shipments, the bulk of them from Qatar in its liquefied form, LNG. Our reliance on this Gulf state for LNG has dropped from above 80% to below 50% over the years as we diversified our sources to include the US, UAE, Oman, Australia and Mozambique. However, Iran's clamp on the Strait of Hormuz—or attempt to play gatekeeper—has cut off LNG supplies to big buyers like Japan, South Korea and Taiwan, which are now in a scramble for options that has pushed up LNG prices in the global spot market. Even for those with contracts, pricing is typically linked to oil price indices such as the Japanese

Crude Cocktail, and when oil gets dearer, so do these contracted supplies. Should India cling to its outdated fertilizer subsidy regime, the public money needed to fund it would bloat. Even if Hormuz opens up to pre-war levels of traffic and production resumes at the LNG plants in the Gulf that have been shut down, the ripple effect of this supply shock could keep the dollar price of gas high and the rupee weak, making it that much harder for the government to keep its spending in check.

Fertilizer reform would both ease pressure on the fisc and raise the efficiency of India's crop production. Heavily subsidized urea releases nitrous oxide into the air, a global warming gas, and pollutes the ground water with nitrates. To boost farm output, we need a judicious mix of fertilizers. While the ideal proportion of nitrogenous (N), phosphatic (P) and potassic (K) fertilizers is 4:2:1, a long-running subsidy skew in favour of N has resulted in an N:P:K farm ratio of 10.9:4.4:4. This depresses nutrient conversion into grain by plants and partly explains why our agricultural value addition per unit of crop area is only 38% of China's. To secure a mix of fertilizer types that is optimal for crop output, India should rid fertilizer prices of their subsidy. An artificial incentive to use a specific fertilizer over others only distorts market choices and masks demand patterns that would otherwise reflect what farmers deem best for their farms. The money saved by putting an end to a distortive subsidy regime could be sent to individual farmers as income support in proportion to the area they cultivate, so that cultivators have no reason to complain. A cost-benefit analysis rarely makes such a robust case for reform. And there's no better time to act than now.

Why India requires a specialized institution for transition finance

It would brighten India's prospects of simultaneously achieving its *Viksit Bharat* and net-zero goals



ABHINAV JINDAL & SHWETA RAI are, respectively, an energy economist, and vice president at a private Indian bank.

India's *Viksit Bharat* 2047 vision requires a massive expansion of infrastructure and manufacturing, highlighted by the \$1.3 trillion National Infrastructure Pipeline. However, achieving this alongside India's net-zero 2070 target poses a financing challenge: investment must jump from \$1.7 trillion to \$22.7 trillion for a full green transition. To remain globally competitive amid tightening carbon border rules, key sectors such as steel and cement must decarbonize rapidly. This double mandate necessitates a specialized transition finance institution.

The EU's Carbon Border Adjustment Mechanism presents a threat to Indian exports like steel and aluminium. From 2026, exporters could face an additional tax burden of 25% and price disadvantages of 15-22%. To maintain market access, production must shift rapidly to lower-emission processes.

Domestically, India's carbon credit trading scheme and green steel frameworks are making emission compliance mandatory. While our voluntary carbon market could reach \$20-40 billion by 2030, high-emitting sectors and small and medium firms face back-breaking capital requirements. As global value chains pivot to mandatory disclosures and net-zero commitments, we need a dedicated financial institution to provide low-cost capital.

The scale, tenor and technological

uncertainty of decarbonization investments exceed the risk appetite of commercial banks. Unlike typical greenfield projects, transition finance often targets the retrofitting of legacy assets with uncertain returns and payback periods of 15-25 years, creating an asset-liability mismatch for banks reliant on short-term deposits. Further, many transition technologies remain commercially untested in India, exposing lenders to default risks from technical underperformance and carbon price volatility.

These challenges are compounded by a lack of specialized technical expertise; as highlighted in the Reserve Bank of India's (RBI) 2022 discussion paper on *Climate Risk and Sustainable Finance*, domestic financial institutions lack the data and scenario-analysis capabilities to accurately price climate risk. Also, India's historical experience with stressed infrastructure assets has entrenched a deep risk aversion *vis-à-vis* heavy industry. Consequently, commercial lenders prioritize near-term returns over long-term systemic benefits, leading to chronic under-provision of capital.

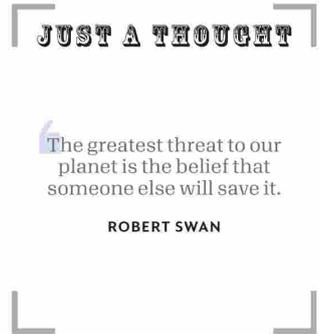
Taken together, relying solely on existing banks and non-bank financial companies would lead to chronic under-provisioning of transition finance, delayed decarbonization and elevated systemic climate risk. International experience shows that specialized public financial institutions can bridge the transition gap through technical expertise and risk-sharing. Germany's KfW provides long-term, concessional financing for green innovation, using sovereign backing to fund projects deemed too risky by commercial lenders. Similarly, the European Investment Bank has been repositioned as a climate bank; it uses blended finance and guarantees to de-risk large-scale decarbonization. The UK Infrastructure Bank illustrates this model, offering patient capital to crowd in private investment for net-zero technologies. These examples show that

accelerating transition investments at scale requires three pillars: concessional funding, specialized technical appraisals and structured risk-sharing mechanisms.

Indian policy discourse, led by Niti Aayog, emphasizes the need for specialized financing to help small businesses and heavy industries decarbonize without losing competitiveness. Proposals include a national green financing body to act as an intermediary, addressing coordination failures and information asymmetry in the transition ecosystem.

India's success in scaling renewable energy offers a proven blueprint. The coordinated efforts of Power Finance Corporation, Rural Electrification Corporation and Solar Energy Corporation of India demonstrate how specialized architecture and policy clarity can drive structural change. To replicate this for the broader net-zero transition, the proposed institution could be administratively anchored under the ministry of finance. A governing council that includes RBI, Niti Aayog and sectoral ministries could ensure that fiscal policy and financial stability are aligned with industrial decarbonization pathways.

In sum, given the external and domestic environment, India's transition finance needs are urgent and non-negotiable and hence require a dedicated transition finance institution with the capacity to provide patient capital, undertake rigorous technical appraisals and align domestic flows of finance with global climate and trade regimes. Such a body would also unify and operationalize a credible transition taxonomy to deliver much-needed transparency, consistency and simplicity for industry. Setting it up would count as a strategic move to ensure that India's pathway to net-zero is orderly, competitive and aligned with the broader national objective of building a resilient and globally integrated economy. In other words, a dedicated transition finance body can help transform climate commitments into a desirable growth formula.



GUEST VIEW

New rules for acquisition finance deepen this market

MOHIT BHATIA & ZUBIN MEHTA



are partners with Shardul Amarchand Mangaldas.

The Reserve Bank of India's (RBI) February 2026 amendments of its Credit Facilities Directions, together with the overhaul of its framework for external commercial borrowings (ECBs), has recast India's acquisition finance regime and opened a regulated channel for bank-led acquisitions.

RBI's new directions allow banks in India to extend 'acquisition finance' to non-financial corporates in the country or their subsidiary or step-down special purpose vehicles (SPVs) so that they can acquire strategic 'control' through equity shares or compulsorily convertible debentures in a domestic or foreign target, where the transaction is a long-term strategic investment for value creation. Incremental acquisitions that cross thresholds of 20%, 51%, 75% or 90% of voting rights are covered by this.

Acquirers will need to demonstrate a net worth of ₹500 crore and positive net profit in each of the preceding three years, and unlisted acquirers will need to additionally hold a BBB- or higher credit rating. The

quantum and equity contribution rules cap bank financing at 75% of the assessed 'acquisition value,' with the acquirer contributing at least 25% from its own funds. For unlisted targets, two independent valuations are required and the lower one applies. Listed acquirers may bridge this contribution for up to 12 months, subject to a clearly identified equity take-out, secured status if bridged by a bank, and no dilution of the acquisition finance security package.

Post-acquisition, the acquirer's debt-to-equity ratio must not exceed 3:1. There is now a mandatory requirement of a corporate guarantee from the parent or holding group of the acquirer; it will be interesting to see how this works in the case of established companies under listed or large corporate houses. The security must include a pledge over acquired shares or compulsorily convertible debentures subject to the 30% per-bank shareholding ceiling under Indian banking regulations. This explicit on-recourse requirement is a deliberate departure from the non-recourse leveraged buyout conventions common in international markets, signalling RBI's intent to prevent fund-style leveraged structures from amplifying financial sector risk.

The acquisition directions expressly con-

template refinancing of the target's existing debt where it is integral to the acquisition. This will be particularly relevant where legacy indebtedness is secured over shares or assets central to the deal, or where existing lenders withhold consent for change of control or security creation. Crucially, such refinancing is excluded from a bank's capital market exposure computation.

The new concentration risk management directions cap a bank's aggregate capital market exposure at 40% of eligible capital, with a sub-limit of 20% for acquisition finance. A separate bright-line rule applies to overseas branches of Indian banks participating in acquisition finance syndications: their aggregate participation in any deal may not exceed 20% of its total funding.

Delivering on the mandate, share pledge intersects with the Foreign Exchange Management Act's framework for non-debt instruments in ways that matter for deal structuring. While pledges to secure ECBs of Indian borrowers or *bona fide* credit facilities

for Indian companies are broadly permitted, friction arises in inbound structures; where a foreign acquirer raises an offshore loan (not an ECB) and deploys its proceeds for investment in India, a pledge over Indian target shares is not within the scope of automatic pledge permissions. This creates a level-playing field concern, as offshore branches of Indian banks will need to mandatorily cap their exposure to 20% of deal funding, given that a pledge is mandatory under the acquisition directions, while foreign investment regulations do not permit a pledge for inbound acquisition financing.

The central bank's new ECB framework clarifies that 'acquisition of control' is a permitted end-use for ECB proceeds—a significant departure from the earlier restricted position. RBI has also removed the prescriptive all-in-cost ceiling and standardized minimum average maturity at three years for most ECBs. These changes open a meaningful offshore debt channel within a clear supervisory framework.

The new reforms appear to be designed for strategic corporates, not financial sponsors. Eligible borrowers must be non-financial companies and SPVs are permitted only as step-downs of qualifying acquirers. Many private equity funds execute acquisitions through freshly formed SPVs or foreign-owned entities lacking three years of profits or the requisite net worth. The 3:1 leverage cap and mandatory recourse further distance the framework from the thinly capitalized non-recourse models that sponsors favour. Sponsor-led transactions will likely gravitate towards private credit, ECBs or seasoned portfolio platforms that meet the acquirer-level filters.

The reforms offer a coherent if conservative path for bank-led acquisition finance in India. Strategic corporates with balance-sheet quality can now access competitive senior bank funds domestically. Sponsors seeking non-recourse high-leverage structures must weigh the ECB route and private credit against the acquisition directions recourse and leverage constraints—and anticipate pledge-permission frictions while structuring inbound deals. Our acquisition finance market has materially deepened, but on terms that emphasize prudence.

These are the authors' personal views.

Strategic buyout deals will be easier to fund but RBI has also taken care to emphasize prudence



THEIR VIEW

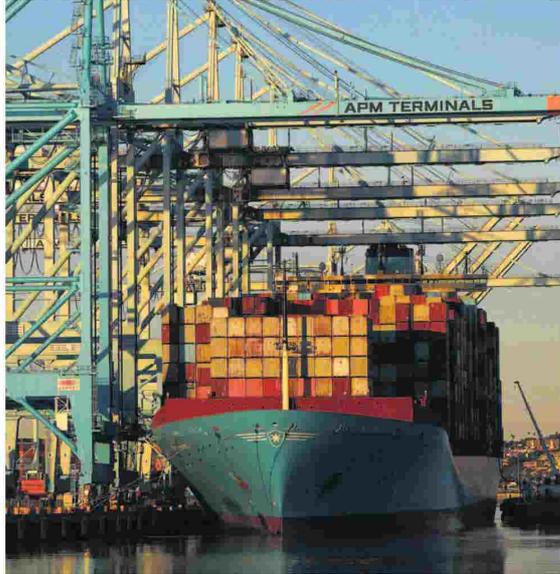
MINT CURATOR

Reform GST: India should fix its distortive input tax credit chain

Credit neutrality would end tax cascades, reduce costs, improve compliance and strengthen India's export competitiveness



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India's goods and services tax (GST) still struggles with a basic design problem: the integrity of its input tax credit (ITC) chain. The recent rate rationalization simplified slabs, but its merger of the 12% category with the 5% slab largely applies to supplies where ITC is restricted or unavailable. In such cases, the system resembles cascading turnover-style taxation and weakens the value-added tax (VAT) principle of credit and tax neutrality. So, beyond rate adjustments, deeper structural issues remain. The proliferation of amendments and layered restrictions has made the law increasingly intricate and compromised ITC chain integrity. Without restoring credit neutrality, simplification of rates alone cannot make GST function as a true VAT.

The Union budget for 2026-27 offered an opportunity to complete this unfinished reform. Industry had expected rationalization of the ITC framework, which remains the most distortive feature of the current system. That opportunity was missed. The result is continued working-capital blockage, avoidable tax cascades and high compliance costs for businesses.

A well-designed GST would be a destination-based consumption tax in which business-to-business transactions are tax-neutral. Taxes paid on inputs, input services and capital goods are fully creditable against output tax, ensuring that tax is levied only on the value added and never becomes a business burden. Preventing tax cascades across the value chain preserves competitiveness in both domestic and export markets.

International experience shows that the strength of a GST lies less in its rate structure and more in the breadth of its base and integrity of its credit mechanism. Countries with minimal exclusions and seamless credit chains achieve higher revenue productivity alongside lower compliance costs. A fragmented base with blocked credits, in contrast, distorts investment and production decisions.

India's ITC framework departs from that principle in significant ways. Multiple restrictions, conditionalities and outright denials of credit have converted what should be a pass-through tax into a cost-imposing one. Blocked credit implies a cascade that raises production cost. For instance, GST paid on immovable capital goods is denied to service providers and restricted for manufacturers to plant and machinery. Yet, such capital goods are not 'consumed'; they are used to conduct business operations. Denial of immediate credit in these cases effectively taxes investment itself.

The problem is compounded by the exclusion of major sectors such as petroleum, electricity, real estate and alcohol from GST coverage. Taxes paid on these cannot be used as credits against GST liabilities and therefore become embedded in down-

stream costs. Structurally, thus, India's GST is an incomplete VAT. When key inputs lie outside its ambit, the credit chain remains patchy and hidden taxes accumulate within production. This ultimately burdens consumers. If India aims to improve the ease of doing business and attract global supply chains, restoring the integrity of the GST credit chain must become central to its tax reform agenda.

The consequences are particularly visible in the export sector. Under the GST framework, exports are intended to be zero-rated so that domestic taxes do not raise export prices. In practice, however, denial of upstream credits and delays in refunds embed unrecoverable taxes into the cost structure of exporters. When taxes paid on inputs, services or capital goods cannot be fully recovered, exporters must finance these amounts through additional working capital. This raises costs and weakens their price edge in global markets, especially in thin-margin sectors. In an increasingly competitive trade environment, even small cost disadvantages can erode market share.

The distortion is worse in sectors where supplies fall under the 5% rate with restricted ITC. In such cases, ITC on capital goods is either not allowed or significantly curtailed. So GST effectively acts as a tax on production. The tax base, in effect, shifts from consumption to investment. Firms investing in machinery, logistics infrastructure or technology in these sectors cannot fully recover the taxes paid on capital equipment.

The implications are significant. First, higher investment costs discourage capacity expansion and modernization in export-oriented sectors. Second, domestic producers operating under truncated credit regimes may find themselves at a dis-

advantage relative to foreign suppliers that benefit from full VAT neutrality. This can encourage greater reliance on imports in certain fields. Third, by raising the cost of capital formation, such restrictions undermine productivity growth and the development of globally competitive manufacturing ecosystems.

In addition, restrictions on credit for capital goods distort relative prices within a production system. Firms facing higher effective tax costs on domestic investment may delay modernization or substitute local products with imported intermediates and finished goods produced under fully creditable VAT regimes abroad. Over time, such asymmetries weaken domestic value addition and reduce the attractiveness of India as a location for globally integrated supply chains. An inadequate ITC mechanism deters 'friend shopping' by international players. Restoring full creditability for business inputs and capital goods is thus essential not only for tax neutrality, but also for the sake of India's industrial competitiveness.

We have let a tax designed for consumption influence where firms locate manufacturing facilities, how much they invest and whether they participate in global supply chains.

If India aspires to become a global manufacturing hub, GST must function as a genuine VAT. We must eliminate blocked credits unrelated to personal consumption, gradually drop excluded sectors into the GST base and ensure time-bound refunds supported by full digitization. Restoring credit neutrality would reduce costs, improve compliance and strengthen export competitiveness. The next phase of GST reform must therefore focus on ITC.

Policymakers must steer clear of gimmicks as oil prices go up

Conservation calls that recall the 70s' oil shock are unlikely to help



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Energy-saving advice is no substitute for prudent macro management. ISTOCKPHOTO

We have been here before. In the 1970s, US President Gerald Ford urged Americans to combat escalating energy costs in response to the Arab-Israeli war. His Whip Inflation Now (Win) initiative encouraged people to grow vegetables in their yards, car pool and use cold water in the laundry. 'Win' badges were churned out and Ford loved pinning them on lapels. Even ex-Beate George Harrison got one during a White House visit.

The exercise was more public relations than serious policy. But half a century on, Asian leaders are asking people to again adapt their habits as oil and gas prices jump due to conflict in West Asia. Work in short sleeves, ease up on the air-conditioning and skip the elevator, they are advised. Now, as then, these measures are not a substitute for effective monetary or fiscal practices. At best, they represent a short holding pattern.

Cutting back is one of the first things human beings can control. But their role will be minor one if the current conflict, which began with an attack on Iran by Israel and the US, is prolonged. What is needed are hard decisions on budgets and interest rates. Fiscal bosses and central banks will be reluctant to deviate greatly from their path before fighting erupted on 28 February. They might get lucky and not have to do much, but it's better to plan than hope. Forthright indications that they will do what's necessary is a minimum.

The duration of the conflict—which the International Energy Agency rates as the biggest ever oil-supply disruption—will determine the path of the world economy, on which Asia's export powerhouses hinge. If there's a conclusion soon, as the White House has suggested, the impact won't be huge. Inflation, which policymakers have wrestled down from its post-covid high, need not flare dramatically and a sharp global downturn could be avoided. The current economic expansion without US tariffs imposed almost a year ago.

Despite Asia's impressive financial and commercial advances since the 1973 war that produced the first oil shock, the region remains dependent in significant ways on events far away. This is a necessary wake-up call to the Asia-rising narrative.

There are important differences between now and the 70s. The US today is the world's largest oil producer and a net energy exporter, thanks to the shale boom. Most central banks enjoy significant independence that was rare then. And while inflation jumped after covid, it never reached the heights of half a century ago.

Central banks, nevertheless, need to call this moment correctly. A slew of officials are slated to meet this week, including the Federal Reserve, European Central Bank and Bank of Japan. At this early stage, expressing an absolute commitment to containing inflation should suffice. Actions can follow—if required. Panic, alarmism and a response that strikes investors as knee-jerk have no place. Only the Reserve Bank of Australia, which has been loudly fretting about inflation for some months, is forecast to hike rates imminently.

One thing ought to be apparent: For now, rate cuts aren't on the cards. And the duration of pauses is likely to be shorter. Bond markets have sold off on fears that inflation will reignite. In Europe, there's serious talk from officials about lessons of 2021-22, when rates were perceived to be slow to rise. The concern is legitimate, given the ECB's primary mandate of price stability, but tightening too hastily can risk economic growth. A growing number of economists predict that the BoJ will lift borrowing costs in April, much sooner than expected. Further rate reductions by the Fed anytime soon are hard to justify.

A generation of central bankers grew up with the moral of the 1970s deeply entrenched: Policy was indecisive in the years after the Yom Kippur War. But what would've been the ideal approach at the time? Hindsight is clearer than foresight, former Fed Vice Chair Alan Blinder wrote in his book, *A Monetary and Fiscal History of the United States, 1961-2021*. Blinder notes that the term 'supply shock' wasn't popularized until later that decade. And inflation wasn't the only scourge; the 1973-75 recession was a nasty one. Misery spread well beyond the US.

Ultimately, back in the 70s, there needed to be clear-sighted monetary and fiscal settings that recognized the new order. Ford wore the Win badge himself. When it came to George Harrison, the Beatles' guitarist returned the favour with a button that said 'Om'.

The 38th occupant of the White House tried valiantly to set an example, but the global economy didn't get very far.

Today, central banks and finance ministers need more than gimmicks. Even if all things must pass, substance has been rarer lately more. **©BLOOMBERG**

MY VIEW | EX MACHINA

Needed: A farm revolution led by AI-driven automation

RAHUL MATTHAN



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Toyota's factory in Woodstock, Ontario, will soon deploy Digit, a humanoid robot from Agility Robotics, on its production floor. These bipedal machines will unload auto parts from warehouse tuggers and onto the production line—work that until now was performed by humans. Toyota chose humanoid robots because its factories are designed for people. By using robots that move like humans, Toyota can automate without redesigning its assembly lines.

On the face of it, this is a small efficiency improvement. But it is a signal of something far larger: the rise of embodied AI and its potential to reshape the global economy. It indicates a future in which countries that build robots will prosper while those that rely on labour supply will struggle.

Just as mechanization replaced physical labour, artificial intelligence has begun to automate cognitive work. For decades, white-collar jobs were immune to automation. That assumption is collapsing. As AI becomes embedded in machines and gains

the ability to interact with the physical world, it will breach the final barrier between software and labour.

Toyota is not the only company using robots. Intuitive Surgical's da Vinci robots are being used in hospitals around the world and have already completed millions of procedures. Waymo vehicles now complete over 150,000 trips per week, proving that AI-embedded physical systems can operate at scale in unstructured and unpredictable environments. Tesla's Optimus range of humanoid robots is in production and is projected to scale significantly by the end of the decade.

As interesting as this sounds, rapid automation is likely to have serious repercussions on society, especially in developing economies. A recent paper in *Labour Economics* argues that the consequences may be so large that normal market adjustments—cheaper labour, lower interest rates or currency depreciation—will not be enough to offset the resulting employment shock. The diffusion of embodied AI could dramatically widen the gap between developing and developed economies.

This could not come at a worse moment for India. With nearly 800 million people under 35, we are experiencing the largest

demographic bulge in human history. This youth bulge was supposed to power India's rise, but if embodied AI is on track to replace labour faster than the economy can absorb it, our demographic dividend could quickly become a demographic disaster.

There may, however, be a way out. Countries that produce robots—rather than import them—should be better placed to ride out the robot revolution. Those that make robots could develop engineering expertise, capture export revenues and build industrial ecosystems that may cushion the labour shock. This suggests that to take advantage of our demographic dividend, we need to actively encourage the manufacture of embodied machines.

How might we go about doing this? One approach might be to identify domestic use cases for embodied AI to develop natural markets for local robotic solutions.

Among the many challenges India faces, agricultural productivity is a core concern.

With the average size of farm holdings hovering at about a hectare, not only is agriculture in India economically unviable for the most part, it has become a poverty trap that has locked 125 million smallholder families into subsistence living. Of all the problems we most urgently need to solve, finding a path out of this developmental crisis ranks near the top.

Advances in AI and robotics offer India a chance to boost the productivity of farms as well as factories

Historically, every successful industrial economy has passed through the same transition: labour first moves from farms to factories and then to services. India has, however, struggled to make this transition from farms to factories.

This suggests that if there is one area worth focusing on, it is the use of automation in agriculture

to hasten the transition of our economy to industrial production. Since we also need to develop domestic markets for embodied AI, it makes sense to promote companies that embed modern AI technologies in machines designed for use in agricultural settings. If India can become the world's testbed for

agricultural robotics, it could also become a global supplier of those machines.

This is not as far-fetched as it might seem. A Bengaluru startup, Niigo Robotics, has already developed an AI-powered precision sprayer that uses computer vision to identify individual plants and apply agrochemicals with millimeter-level accuracy. By running AI directly on edge devices, the system allows farmers to retrofit existing tractors and use them even in locations with constrained bandwidth, sharply reducing both input costs and environmental damage.

This is just one example of how India could embed AI into farm machines to improve efficiencies. We could see the development of harvest robots designed for crops like cotton, chili, tomato and onion, which require manual picking and sorting. To raise agricultural productivity, we could look to deploy automated soil-sensing solutions that can dynamically provide farmers customized insights about their land. Thanks to AI-embedded soil moisture sensors, it should be possible to significantly reduce water and pesticide usage on farms. Every successful economy mechanized its farms before building its factories. We may have to do both at once—and we may have less time than we think.



Editor's TAKE

The dangerous endgame of the Iran-US-Israel war

President Trump insists that US and Israeli strikes have crippled Iran's military capability, yet Tehran's response suggests that the war is far from settled

It has been more than two weeks since the US attacked Iran with missiles and stealth bombers, hoping to end the war within days. But, given the way the war is progressing, US calculations have gone haywire. While Iran has borne the brunt of missile attacks – its supreme leader killed, its strategic targets hit, oil installations struck, and even the civilian population affected – yet it refuses to cave in or implode. On the contrary, it is showing resilience that no one had imagined. It has struck US bases in the Gulf, attacked Israel by penetrating the Iron Dome, and paralysed the USS Abraham Lincoln. Its missiles are smartly dodging interceptors and hitting targets at will. Its swarm fleet of drones is creating havoc, and this too after almost five decades of sanctions.

Meanwhile, the US looks isolated in the war, as no country – not even its allies in Europe, such as the UK, France, Germany, and Spain – is willing to toe its line. To make matters worse, Iran has choked the Strait of Hormuz, through which almost 25 per cent of world oil passes, in commercial carriers. The regional war has escalated into a global crisis, as countries are running out of gas and crude oil with no end in sight.

So, two weeks on, the million barrel question is: who is actually winning? The answer, however, is not straight forward. In war, the first casualty is truth, as both sides claim victory and attempt to hold the moral high ground. From Washington's perspective, its campaign has been decisive and crippled Iran. The United States and Israel have launched extensive airstrikes against Iranian military infrastructure, including a major assault on Kharg Island-Iran's crucial energy hub in the Persian Gulf.

According to American officials, more than 90 military targets were destroyed in a single operation, severely weakening Iran's naval and missile capabilities. For President Donald Trump, this constitutes a strategic victory. His administration argues that Iran's command networks, air defences, and key bases have been decimated in record time. Tehran's strategy has shifted from direct confrontation to strategic denial – ensuring that even if it cannot win militarily, its adversaries cannot claim a stable victory either. By threatening shipping and restricting passage for adversarial vessels, Iran has managed to transform a regional war into a global economic crisis. Oil prices have surged above \$100 per barrel, financial markets have turned volatile, and governments across Europe and Asia are scrambling to secure energy supplies. This asymmetry explains the paradox of the current conflict. Militarily, the United States and Israel may have the upper hand. Strategically, however, Iran still holds a powerful card: escalation. The primary objective of the US assault was to annihilate the top leadership and effect a regime change, installing a puppet regime to gain total control of the Persian Gulf. This has not happened, and Iran has shown no inclination to surrender or negotiate, whereas the US and Israel are facing public wrath for having started a war they may not decisively win. Post-World War, the US has not won a war that can be called complete. With both sides digging their heels in, the chances are that the war may be prolonged, as the world pays the price for no fault of its own.

Speaker in the storm: The failed motion

In a Parliament often marked by acrimony, the episode revived an enduring question at the heart of Indian democracy: how to preserve the neutrality and authority of the Speaker while maintaining trust between the Government and the Opposition



KALYANI SHANKAR

The role of the Lok Sabha Speaker in promoting parliamentary stability and independence is incredibly important and deserves recognition. On March 11, 2026, the Opposition's impeachment motion against Speaker Om Birla was defeated by a vote, nearly four decades after the last attempt. With 119 MPs signing the notice, the Opposition highlighted the perceived bias in the Speaker's conduct. Removing a Speaker requires at least 272 votes in the 543-member House, and historically, no Speaker has ever been removed. The Speaker is back in his chair.

The repeated challenges to the Speaker underscore political tensions in the legislature, raising questions about the balance of power and mutual respect among legislators. Thus, the Speaker's role is essential to both legislative procedures and the fostering of trust in parliamentary democracy.

Following the unsuccessful impeachment motion, Speaker Birla reiterated his impartiality, asserting that the rules apply equally to all members, including the Prime Minister. He addressed the House to refute allegations of bias. He clarified that there is no mechanism to mute the Speaker's microphone. He emphasised, "This House is not a fair or a festival. We must follow the rules, and no one has the right to speak outside them, regardless of their position."

Union Home Minister Amit Shah criticised the Opposition for its unruly conduct in Parliament, highlighting Rahul Gandhi's low attendance—51 per cent in the 17th Lok Sabha and 52 per cent in the 16th Lok Sabha, compared to averages of 66 per cent and 80 per cent, respectively. The Opposition protested by chanting "Maafi maango," demanding an apology from the Home Minister.

The impeachment motion underscored the ruling party's substantial majority and reinforced the importance of parliamentary procedures. It highlighted the respect that the House warrants for its legislative processes. Jagadamba Pal, a member of the BJP panel who presided over the session, called upon the Opposition to resume their seats to facilitate voting. Nevertheless, amid ongoing chaos, he chose to conduct a voice vote in the House, which led to the resolution's rejection. The House was subsequently adjourned for the day.

Impeachment motions are infrequent occurrences in the history of India's parliamentary system. The attempt to remove Speaker Birla marks the fourth such effort, underscoring the



UNION HOME MINISTER AMIT SHAH CRITICISED THE LEADER OF THE OPPOSITION, RAHUL GANDHI, STATING THAT HE TRAVELS FOR PARTY PURPOSES AND PUBLICITY RATHER THAN ATTENDING PARLIAMENTARY SESSIONS

inherent challenges of this vital office. The Speaker's position is safeguarded by the House itself rather than the President, and removal can occur only by a majority vote. This underlines the office's independence and its critical role in maintaining parliamentary stability. The previous efforts included a 1954 motion against the first Speaker, GV Mavalankar, and the recent motion against Birla. These incidents highlight ongoing concerns regarding bias and parliamentary conduct.

Since independence, there have been three unsuccessful attempts to remove a Speaker of the Lok Sabha. The first was in 1954 against GV Mavalankar, the first Speaker. The motion was debated on December 18, with Prime Minister Jawaharlal Nehru and Leader of the Opposition AK Gopalan participating. MPs accused Mavalankar of disallowing relevant questions and mishandling adjournment notices.

In 1966, MPs accused Sardar Sukarni Singh of obstructing inquiries that could embarrass the government and failing to submit privilege notices. The motion did not advance, as fewer than 50 MPs supported it.

CPI(M) MP Somnath Chatterjee proposed a resolution against Speaker Balam Jhakar. Key participants included Prime Minister Rajiv Gandhi and P Chidambaram. The House voted against the motion. In the Rajya Sabha, attempts to remove Vice President and Chairman Jagdeep Dhankhar in 2024 have failed. Similarly, the 2020 notices to remove Deputy Chairman Harivansh Narayan Singh did not spark a debate.

The 'effective majority' requirement—defined as a majority of all sitting House members—establishes the threshold for removing a Speaker, ensuring that a signifi-

cant consensus is necessary. During the impeachment debate, Opposition leaders raised concerns about a vacant Deputy Speaker position, faulty microphones, limited speaking rights for Opposition members, and mass suspensions. These issues focus on the challenges facing parliamentary institutions and the Speaker's office.

Union Home Minister Amit Shah criticised the Leader of the Opposition, Rahul Gandhi, stating that he travels for party purposes and publicity rather than attending parliamentary sessions. "He skipped the President's speech, the Budget, and discussions on Article 370. During key parliamentary sessions, he travels abroad and claims he is not allowed to speak," Shah stated.

"According to the established history of this House, its proceedings are conducted based on mutual trust. The Speaker serves as a neutral custodian, representing both the ruling party and the Opposition. It was unfortunate for parliamentary politics that a resolution for the removal of the Speaker has been introduced," he added.

The Speaker's authority underscores the importance of impartiality and the challenges posed during contentious moments, such as impeachment debates, helping the audience grasp the office's significance to parliamentary stability. Modi, at the end of the impeachment debate, commented on Birla's conducting Lok Sabha proceedings with "dedication, patience and impartiality." Now that the House has defeated the impeachment motion,

Even if the Lok Sabha is dissolved, Speaker Om Birla remains in office until the new House meets and elects a new Speaker.

The Pioneer SINCE 1865

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PHOTO: PTI

Svabhava: The nature that shapes who we are



AJIT KUMAR BISHNOI

2ND OPINION

What do we normally remember about someone? It is mostly how he behaved towards us – kindly, warmly, angrily, etc. Looks, etc. become a faint memory. How he made us feel is what one remembers most. Traits of nature stand out, and we decide to deal with such a person accordingly.

For example, if someone was friendly, we are likely to continue our relationship. Conversely, if he was an egoist, one will think twice before wanting to meet him again. We all have peculiarities, and others are quick to notice them. We may not be so aware of them ourselves.

What is 'svabhava' (nature) made of? Just as material nature consists of the three 'gunas' (modes), personal nature similarly has three modes. Every one of us has

a combination of goodness, passion and darkness in our nature. Whichever mode is in ascendancy at any time, we are likely to act accordingly. For example, if a person is in a good mode, he will act mostly nicely with others.

How do we get this personal nature? It is determined by the Divine Authority on the basis of our past 'karmas' (acts). As whatever is destined must manifest, nature also makes its presence felt. Since it will have more proportion of darkness as well, we will have many flaws in our nature. People carry deep desires for lust, greed, anger, hate, etc.

The predominance of these defines a person. Surely, we are classified accordingly. A 'kshatriya' (warrior) is suited to defend a country, and a 'brahmin' is best suited for teaching and preaching. The soul in itself is pure, but nature is what defines him. This nature will always remain with the soul wherever he goes or whatever species he is born into.

Now the main question is about its improvement. To begin with, let me clarify that nature is very difficult to change, and all changes can only be slow. Until then, a person will behave according to his nature; a lustful person will act in a lustful manner. Attempts to act differently will most likely fail (The Bhagavad Gita 3.33). Are we, then, doomed? No, because God has not made us in that fashion. But only a very determined person

can effect changes in one's nature, especially because it requires taking help from God (7.14), this being part of fate.

Faith and nature are interlinked. Lord Krishna has made it quite clear: "Faith of all is according to one's nature only. Whatever faith he has, he is that only." (17.3) So the solution is clear.

One has to develop faith in God. And for that, one must begin practising spiritual disciplines such as chanting, meditation, etc., to establish a connection with God.

Then God comes into action and begins to guide and help. Our habits will change for the better. Simultaneously, one must begin to associate with things rooted in goodness, such as consuming food in goodness. This, together with God's help, will change one's nature. Ultimately, our nature shapes our actions, relationships and destiny. While svabhava is difficult to change, it is not immutable. Through faith in God, sincere spiritual practice, and association with goodness, gradual transformation becomes possible. With divine guidance, even deeply ingrained tendencies can evolve towards purity, compassion and higher consciousness.

The Pioneer SINCE 1865

The writer is a spiritual teacher

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OIL BONDS INFLUENCE INDIA'S FUEL PRICE DEBATE

"Oil bonds" in India refer to special securities issued by the government to Oil Marketing Companies (OMCs) to compensate them for selling fuel below market prices, instead of providing direct cash subsidies. The central government has stated that its inability to significantly reduce taxes on petrol and diesel is partly due to the financial strain of servicing these bonds.

Opposition parties and critics argue that the revenue collected from fuel excise duties far exceeds the expenditure on servicing these bonds. In essence, oil bonds represent deferred liabilities that continue to influence fiscal decisions and have become a point of political debate over high fuel prices.

In fact, oil bonds acted as supportive buffers, enabling oil

companies to avoid sharp increases in fuel prices. The government has reported that repayments, including interest, will continue until 2026, with the total liability expected to reach around ₹2.6 lakh crore. These long-term instruments, typically spanning 15-20 years, are treated as "below the line" items in the Union Budget, thereby not impacting the fiscal deficit immediately but increasing overall public debt.

Such measures serve as economic shock absorbers, protecting consumers from sudden price spikes. They reflect policy decisions taken in the broader public interest, irrespective of the ruling dispensation.

OKS RAMANI | CHENNAI

Temporary fix for oil crisis

European Union foreign policy chief Kaja Kallas has reportedly discussed with United Nations Secretary-General António Guterres a proposal to facilitate oil and gas transport through the Strait of Hormuz by replicating a mechanism similar to the wartime Black Sea grain export deal. While such an arrangement may offer limited relief, it is unlikely to fully resolve the ongoing global energy crisis.

The Strait of Hormuz remains a far more critical choke point, handling nearly 20 per cent of global liquid petroleum consumption and over 15 million barrels of oil per day.

Any safe corridor established under such a framework would inevitably fall short of matching the capacity of normal tanker traffic.

At best, a Black Sea-type initiative could serve as a temporary crisis mitigation measure to prevent a complete disruption of global energy supplies. However, it cannot replace the substantial share of world seaborne oil trade that passes through the Strait of Hormuz.

A durable solution must therefore address broader geopolitical tensions rather than rely solely on interim logistical arrangements.

RANGANATHAN SIVAKUMAR | CHENNAI

Protests weaken election credibility

Apropos, "Midnight transfers by ECI in West Bengal trigger protests," March 17. Once election schedules are announced, the administrative machinery of a state formally comes under the supervision of the Election Commission of India. This arrangement is neither arbitrary nor political; it is a well-established constitutional mechanism designed to ensure free, fair, and impartial elections. The transfer and posting of officials during this period is a routine exercise intended to prevent bias, undue influence, or misuse of state resources. Such measures are essential to maintaining the integrity of the electoral process.

Against this backdrop, the street protests led by Mamata Banerjee raise pertinent concerns. When a lawful and time-tested procedure is in operation, public dissent from a sitting Chief Minister appears less about principle and more about political optics. Such actions risk undermining public confidence in democratic institutions while promoting a narrative of grievance. While political mobilisation is intrinsic to democracy, protesting established procedural norms may blur the distinction between governance and campaigning, thereby weakening institutional credibility.

N SADHASIVA REDDY | BENGALURU

Academic freedom requires responsibility

The Supreme Court's decision to close criminal proceedings against Ashoka University professor Ali Khan Mahmudabad offers an important moment to reflect on the balance between free expression and legal restraint in a democratic society. While social media posts may sometimes be misinterpreted or provoke strong reactions, the application of stringent criminal provisions should remain a measure of last resort.

Academic voices, even when critical or controversial, play a vital role in enriching public discourse. Universities must remain spaces for inquiry, debate, and intellectual independence. Subjecting scholars to criminal prosecution for expressing opinions risks creating a chilling effect that discourages open dialogue. At the same time, responsible expression is equally important, particularly on sensitive matters involving national institutions such as the armed forces. Public commentary must remain measured and mindful of broader societal implications.

The Supreme Court's balanced approach, closing the case while advising prudence, upholds both constitutional freedoms and social responsibility. Such equilibrium is essential for sustaining democratic values.

SAHJAY CHOPRA | MOHALI

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BJP's Punjab Gambit: Redrawing the State's political map

Punjab has long eluded the Bharatiya Janata Party. Yet, with the 2027 Assembly elections approaching, the party's central leadership — led by Amit Shah — appears determined to change that equation by expanding its social base, rebuilding bridges with Sikh voters and farmers, and positioning itself as a long-term contender in the state

FIRST Column



MONIKA MALIK

Punjab has rarely been comfortable political territory for the Bharatiya Janata Party (BJP). Yet, as the state moves towards the 2027 Assembly elections, the party's central leadership appears determined to rewrite that political equation. The strategy emerging from Amit Shah's political messaging in Moga suggests a calculated attempt to reposition the BJP in a state where it has historically remained peripheral.

The significance lies not in the speech itself but in the political architecture behind it. The signals were unmistakable — the BJP's Punjab campaign will be centrally directed, its messaging carefully crafted around Sikh sensitivities, and its social outreach widened far beyond the party's traditional urban Hindu base.

This is less a conventional election campaign and more a long-term experiment to construct a new political constituency in Punjab.

One of the clearest messages from Shah's intervention is that the BJP will not leave the Punjab battle solely to its state leadership. The campaign is likely to be driven by the national leadership, reflecting the party's belief that Punjab requires a carefully controlled strategy rather than a routine state-level contest.

For the BJP, Punjab is politically delicate for multiple reasons. The aftermaths of the farm laws agitation continue to influence voter perceptions, especially in rural areas dominated by Sikh farmers. At the same time, the party's traditional alliance architecture has collapsed, forcing it to redefine its role in the state's political ecosystem.

Shah's approach appears to be aimed at building the party's legitimacy step by step rather than chasing immediate electoral victory.

Rebuilding bridges with Sikh voters

The BJP's biggest structural challenge in Punjab has always been its limited acceptance among Sikh voters. Without making inroads into this electorate, the party cannot realistically compete in the majority of Assembly constituencies.

The emphasis on visible Sikh leadership



WHETHER THIS STRATEGY SUCCEEDS WILL DEPEND NOT ONLY ON MESSAGING BUT ALSO ON THE BJP'S ABILITY TO BUILD A GENUINE GRASSROOTS PRESENCE IN RURAL PUNJAB

reflects an attempt to change that perception. The BJP now appears keen to project Sikh leaders prominently within the party structure, signalling that Sikh representation will not be tokenistic but central to its Punjab strategy.

Punjab's electoral arithmetic explains the urgency of this effort. Sikh voters dominate roughly 70 to 75 per cent of the state's 117 Assembly constituencies. In regions such as Malwa and Majha, the Sikh electorate holds decisive influence in a majority of seats. For a party that has historically been viewed as urban-centric, building credibility in these constituencies is essential. The BJP's ongoing induction of Sikh leaders and its effort to highlight their political visibility suggest a deliberate attempt to create a new leadership layer capable of engaging rural Punjab.

The farmer factor: Healing a political rupture
Economic challenges for the BJP is its strained relationship with farmers. The farm laws agitation, coupled with the

unfulfilled promise of a legal guarantee on minimum support price (MSP), created a deep political rupture between the saffron party and large sections of Punjab's agrarian community. Repairing this relationship is central to the BJP's electoral ambitions. By emphasising that the Central Government continues to work in the interest of farmers and dismissing fears surrounding international trade agreements, the party appears to be attempting a slow process of trust rebuilding. This effort is as much psychological as political. The BJP's leaders know that rural hostility once prevented them from entering villages in Punjab. Any improvement in that perception, even marginal, could open political space for the party.

A crucial element of the BJP's messaging is the emphasis on its rising vote share in Punjab. The party's vote share rose from 6.6 per cent in the 2022 Assembly elections to more than 19 per cent in the 2024 Lok Sabha polls. Shah's narrative frames

this increase as the beginning of a political trajectory that could eventually lead to power. The argument is designed less for immediate persuasion and more for long-term psychological impact. Within the party organisation, it seeks to instil confidence among workers who have long struggled in a difficult political environment. Among voters, it attempts to reposition the BJP as a growing political force rather than a marginal contender. In electoral politics, momentum can often become self-reinforcing. Shah's strategy appears to rely on creating precisely that perception.

A new political agenda: Religious conversion

The BJP's messaging in Punjab is also attempting to reshape the political agenda itself. By raising the issue of religious conversions and promising legislation to prevent them, the party has introduced a sensitive religious question into Punjab's political discourse. The issue resonates particularly among Sikh groups concerned about conversion trends among marginalised communities. Simultaneously, the BJP is trying to claim ownership of governance issues that have long troubled the state — particularly the drug menace. By promising to eliminate drugs within two years, the party is attempting to position itself as a decisive alternative to governments that have repeatedly pledged action but struggled to deliver. These themes — identity, law and order, and governance — form the ideological backbone of the BJP's emerging Punjab narrative.

The BJP's strategy is not limited to Sikh outreach. It is also attempting to broaden its social coalition in Punjab by engaging other influential communities. One important component of this effort is outreach to Other Backward Classes. Haryana Chief Minister Nayab Singh Saini, himself an OBC leader, has been repeatedly deployed in Punjab to connect with these voters. His frequent appearances in the state reflect a deliberate attempt to build a political bridge with communities that have historically remained outside the BJP's core support base. Similarly, the party is making a visible effort to connect with Dalit voters, who constitute a significant share of Punjab's population. Prime Minister Narendra Modi's visit to Dera Ballan in Jalandhar on 1 February, immediately after presenting

the Union Budget in Parliament, was widely interpreted as a symbolic gesture towards the Ravidasia community. The dera is considered a nerve centre of Dalit politics in the state. These outreach efforts suggest that the BJP is attempting to build a multi-layered social coalition rather than relying on a single identity bloc.

Learning from the 2022 setback

The BJP's current strategy also reflects lessons learned from its experience in the 2022 Assembly elections. After its alliance with the Akali Dal collapsed in 2020, the BJP effectively entered the contest almost alone. The party attempted to compensate by forming a coalition with breakaway factions — Capt Amarinder Singh's Congress offshoot and Sukhdev Singh Dhindsa's Akali faction. Yet, the arrangement proved politically ineffective, and the experiment ended in a disappointing electoral outcome.

That setback has forced the BJP to rethink its approach. Instead of relying on fragmented alliances, the party now appears focused on building its own organisational strength in the state.

The emerging signals suggest that the BJP is preparing to fight the next Assembly election largely on its own. This marks a significant shift from decades of politics in which the party functioned as the junior partner in the Akali-BJP alliance. Contesting independently indicates that the BJP now seeks to evolve from a supporting player into a principal political actor in Punjab. Such an ambition is undoubtedly risky. Punjab's political landscape remains dominated by regional forces with deep social roots. It will need more than symbolic gestures or short-term campaign narratives.

What Amit Shah's intervention ultimately reveals is that the BJP is preparing for a long political experiment in Punjab. The party is attempting to rebuild its relationship with Sikh voters, repair trust with farmers, cultivate OBC and Dalit support, and address the labour force as a credible governing alternative. Each of these objectives requires sustained political engagement over time.

Whether this strategy succeeds will depend not only on messaging but also on the BJP's ability to build a genuine grassroots presence in rural Punjab. For now, the blueprint has been drawn. The real test will lie in whether the party can translate this carefully crafted political design into electoral reality.



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The India-EU free trade agreement: State that stands to gain the most



JASHAN KAKKUR

SURBHI SINGH

The India-EU Free Trade Agreement heralds a major reset in India's trade playbook with one of its most valuable markets. With bilateral merchandise trade at USD 136.54 billion in FY25 and exports at USD 75.85 billion, yielding a USD 15.29 bn surplus, the agreement comes as the EU withdraws GSP preferences, exposing 87 per cent of India's exports to tariffs. These withdrawals have been sharp in labour-intensive sectors such as textiles, apparel and leather. By eliminating duties on over 99 per cent of India's export value, the FTA replaces uncertainty with predictable market access.

This stability matters as India's exports to the EU have grown 16.4 per cent annually since 2020-21, driven by labour-intensive and engineering sectors. Preferential access under the FTA helps offset competitive disadvantages vis-à-vis rivals such as Bangladesh, Turkey and Pakistan in textiles and apparel. A European market of USD 263.5 billion where tariff asymmetries have constrained India's share, as competitors have enjoyed lower tariffs on key apparel lines, eroding India's price competitiveness despite comparable product quality. The EU will remove duties on nearly 97 per cent of tariff lines, covering over 99 per cent of trade value, with most labour-intensive exports gaining immediate relief. Few of India's existing trade agreements deliver this level of coverage, underlining the deal's strategic depth.

For India's states, however, the real dividends of this expanded market access will depend on export capacity on the ground — few states are as consequential to this equation as Uttar Pradesh.

Uttar Pradesh at the heart of India's EU Trade opportunity

The European Union has emerged as a critical export destination for Uttar Pradesh, placing the state firmly within India's evolving trade engagement with Europe. Of India's total exports to the EU, Uttar Pradesh contributed nearly USD 6.3 billion — around 83 per cent of the national total. After decades of trailing coastal states, Uttar Pradesh's rise signals a quiet



rebalancing in India's export geography and its growing integration into EU-facing trade.

Over the past decade, exports to the EU have grown at a CAGR of 8.44 per cent, signalling sustained engagement rather than a recent spike. This growth suggests that European demand for Uttar Pradesh's products is already established; the FTA simply removes tariff frictions that have constrained scale. In that sense, the agreement magnifies an existing edge, making Uttar Pradesh a rare case of a state entering an FTA with an established foothold in the partner market.

Nearly 80 per cent of Uttar Pradesh's EU-bound shipments are absorbed by six economies — Germany, Austria, France, the Netherlands, Spain and Italy. For a state exporting into such mature and regulation-heavy economies, stable and long-term market access is a prerequisite for predictable competitiveness.

Sectorally, the case sharpens: electrical machinery accounts for nearly 50 per cent of Uttar Pradesh's EU-bound exports, followed by apparel, leather and footwear, and carpets — together forming 75 per cent of the basket worth USD 4.7 billion. These labour-intensive, MSME-dominated sectors are rooted in regional clusters such as the carpet belt of Mirzapur and the leather hubs of Kanpur and Agra, already integrated with European value chains. For Uttar Pradesh, therefore, the India-EU FTA is not merely about expanding trade volumes; it is about safeguarding employment, enabling small firms to scale, and anchoring the state's manufacturing transition within global value chains.

Market access is not market entry!

The India-EU FTA's impact will unfold not in negotiations, but on factory floors. Even as tariff barriers fall, Indian exporters, particularly MSMEs, will continue to confront some of the European Union's most exacting regulatory

regimes. The Carbon Border Adjustment Mechanism (CBAM) marks a decisive shift in market access, extending compliance beyond product quality to carbon accounting and sustainability disclosure. Compliance audits and emissions reporting will raise costs, hitting smaller firms hardest. For sectors such as electrical machinery, ceramics and certain metal products, where Uttar Pradesh has a growing footprint, carbon intensity will increasingly determine who can export competitively — not just who can produce cheaply.

To compete in the EU market, exporters must also meet strict regulatory standards on chemicals, product safety and manufacturing quality requirements that demand testing, traceability and continuous upgrades. With 97 per cent of India's MSMEs classified as micro enterprises, compliance costs could constrain export growth. Existing support schemes remain too limited for this transition.

This is where the promise of the FTA intersects with the urgency of domestic reform. Without a sharper domestic regulatory and industrial policy push, preferential access to the EU will accrue to a narrow pool of firms already equipped to bear compliance costs. With the right state-level push, however, the India-EU FTA can do far more — forcing MSME upgrading, formalising supply chains, and positioning states like Uttar Pradesh as serious players in high-value global markets. This includes testing facilities, financing for cleaner technologies, and support for carbon accounting in export clusters. The agreement is signed; what remains is the harder task of making it count, especially for states like Uttar Pradesh that already have a foothold in Europe but now need to climb the quality and sustainability ladder.

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Dealing with Gutkha menace



SAMRAT CHOWDHERY

DEREK YACH

India's attempt to ban gutkha is celebrated as a triumph of public health legislation. Over the past decade, the central and state governments systematically outlawed the toxic blend of chewing tobacco, areca nut and flavourings. Optimists surged when the Global Adult Tobacco Survey (GATS-2) projected a comforting 4.5 per cent decline in smokeless tobacco prevalence. But sweeping prohibitions rarely rewrite ground realities.

A recent working paper from the Economic Advisory Council to the Prime Minister (EAC-PM) dismantles the narrative of a success. Full ban. Relying on the 2023-24 Household Consumption Expenditure Survey (HCES), Working Paper WPI/42/2026 tracks the financial outflow of families rather than relying on self-reported health surveys that are historically skewed by social stigma. The economic data reveals that, rather than declining, the footprint of gutkha has expanded aggressively over the past decade.

In rural India, the share of households reporting gutkha consumption skyrocketed from 5.3 per cent in 2011-12 to 30.4 per cent in 2023-24, a more than five-fold rise. This translates to a jump from 8.9 million to 59.6 million rural households buying the product. Urban centres experienced an identical explosion, as prevalence climbed from 3.1 per cent to 16.8 per cent over the same period. The burden of this unchecked expansion falls disproportionately on lower-income households, where prevalence rose even faster. Despite the ban, gutkha now accounts for 41 per cent of all rural tobacco expenditure, making it the single largest tobacco product by value. Prevalence exceeds 85 per cent among the poorest 40 per cent of rural households in the largest states, such as Madhya Pradesh and Uttar Pradesh, severely misallocating limited resources and pulling critical funds away from food and education.

The public health implications are grave. Gutkha is uniquely deadly, as it combines two highly potent Class I carcinogens: tobacco and areca nut. Regular use is associated with oral submucous fibrosis, leucoplakia, periodontal disease, and increased risks of cardiovascular disease. India already shoulders one of the highest global burdens of head-and-neck cancers, with tobacco and areca nut linked to over 90 per cent of cases. This rising tide of consumption threatens to accelerate the epidemic. The failure of the gutkha ban is the consequence of a flawed regulatory envi-

ronment. Prohibition has simply driven the industry to innovate its distribution through clever product unbundling. Vendors sell tobacco and areca nut (pan masala) sachets separately, allowing users to mix the gutkha components themselves at the point of sale. Combined with weak enforcement and aggressive surrogate advertising, the habit has become deeply normalised across the labour force, making it difficult to endure gruelling work shifts. The resulting wave of chronic disease will inevitably strain public healthcare initiatives. Policymakers urgently need to pivot towards pragmatic, data-driven alternatives. The current model of strict prohibition and taxation has failed. Punitive taxes do not force low-income users to quit; they simply impoverish them further while enriching a massive illicit market, which is now valued at over \$3.3 billion, according to the latest industry data.

A mature regulatory strategy must embrace tobacco harm reduction. The primary objective should be migrating current users away from carcinogenic smokeless tobacco like gutkha. Enabling access to significantly lower-risk alternatives provides a realistic off-ramp, while decreasing pressure on state machinery.

In modern nicotine pouches, nicotine replacement therapies (NRTs), and cystine-based cessation treatments address chemical dependency without the harm reduction approach is far more effective than prohibition. We can look at global precedents to see this in action. Sweden is on track to become the first formally "smoke-free" nation, with cigarette use down to near 0 per cent by embracing safer oral nicotine alternatives such as snus and tobacco-free pouches.

Predictive models for countries adopting harm reduction forecast significant public health dividends. Studies in regions such as Africa and Southeast Asia show that adopting safer alternatives could save hundreds of thousands of lives in millions of years by 2060. Scaling these projections to India's 1.4 billion users indicates that nearly 50 million life-years could be saved by simply transitioning users to safer nicotine delivery systems.

We must expand access to these safer options alongside smart regulation, risk-proportionate taxation, and robust cessation support. Prohibition fails when demand and social acceptability remain high. Banning products without providing viable withdrawal plans traps millions of users in a deadly cycle of addiction and fuels a booming black market. Acknowledging a policy failure is difficult for any administration. But ignoring the evidence from national economic surveys guarantees a severe public health disaster. Shifting towards pragmatic harm reduction is the only realistic way to avert a massive future burden of preventable disease and death.

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[OUR TAKE]

Old mistakes, new defeats

Rajya Sabha polls have exposed the Opposition's organisational weakness

The Opposition's shocking losses in the Rajya Sabha polls in Odisha and Bihar, and its narrow victory in Haryana — if losing nine votes and winning by just one, after suffering both crossvoting and disqualification of votes, can be called a victory — hold some insights.

One, the Opposition's slide in national politics is not just ideological or electoral, but also organisational. Since its relatively stellar performance in the 2024 Lok Sabha polls, the Opposition has stumbled again and again — prominently in Haryana, Maharashtra, and Bihar — but refuses to learn lessons in setting its own house in order. The Congress was so confident of winning Haryana that it didn't bother resolving a battle between its senior leaders, ultimately costing it the state. The Maha Vikas Aghadi was so consumed in dividing up the spoils of imagined poll victories in Maharashtra that it couldn't even finalise a seat-sharing agreement. In Bihar, personal conflict between the two biggest leaders of the Opposition hamstrung its campaign, leading to another drubbing.

This time too, long-time loyalists and young lawmakers broke ranks to undercut party candidates across states. Organisation and internal discipline might be unglamorous, but they're an essential ingredient to political success. Instead of reshuffling their internal mechanism after assembly election setbacks, the losses indicate that the Opposition has not regrouped in Haryana 17 months after its loss, and in Odisha, nearly two years after the BJP ousted the BJD from power. The Opposition will blame money and the entrapments of power, but its organisational chiefs must ask themselves how they can be caught unawares in state after state, even as the BJP pinches votes from under their noses.

Unfortunately, when it comes to Rajya Sabha polls, crossvoting and horse-trading have been endemic for decades, which undermines the second inference. The complicated design and formula for the Upper House polls and the absence of an anti-defection law (in the context of elections to the Upper House) have enabled the ruling party of the day to strong-arm lawmakers and push its candidates through. In indirect polls, such practices might make for thrilling political drama. But there is no escaping the fact that such practices hurt the credibility of parties and the election process. The Rajya Sabha was envisioned to give a voice to the states. It deserves a more dignified and transparent election process.

When hospitals become fire hazards

The Odisha government lost little time in announcing a judicial probe into the fire at SCB Medical College and Hospital on Monday that killed 12 and left 14 with serious injuries, along with compensation for their families. Given that the hospital is run by the state government, it must now enable the single-member (a district judge) commission that is being appointed, to conduct a thorough probe that reveals all points of failure so that those responsible for the fire are brought to book.

The tragedy is a telling indictment of the poor upkeep of the state's oldest hospital (established in 1944). A facility this old is sure to have serious deficiencies in terms of modern safety standards. The 2019 decision to upgrade the hospital into a "world-class, AIMS-plus" facility would seem the right prescription — only if implementation had matched ambition. The ₹4,400-crore project suffered several delays, with the deadline postponed from July 2024 to December 2025 and then to July 2026 — earning stinging rebukes from the Odisha High Court. Meanwhile, the safety of the hospital's crumbling infrastructure seems to have taken a backseat. The state fire services administration pointed out that the last fire safety audit, conducted well over a year ago, had suggested several measures. There appear to have been some shocking failures of routine operation as well — the control valve of the automatic sprinkler system being closed and the fire alarm switched off.

Most past instances of hospital fires — across the country — highlighted a volatile mix of hospitals' particular vulnerability to such accidents (presence of combustible material, overcrowding) and strings of administrative lapses (poor infrastructure to safety negligence). The state government must now put the pending upgradation work on the fast track, address vulnerabilities in existing infrastructure at the earliest, and book the administrators culpable for the disaster. Other states would do well to take note.

Equity must underpin energy transition policy

Policies to promote clean transportation must keep two objectives in mind — overall reduction of non-renewable resource consumption and equity in promotion of new technologies

The 70 million citizens of India's national capital region (NCR) and its adjoining districts frequently choke on air pollution. It's not just the visible, seasonal phenomenon caused by farmers burning stubble, but a year-round problem for which the transport sector is commonly cited as the highest contributor.

The government is struggling to impose effective regulations to reduce overall emissions. One contention is the policy of solutions: Producers of smaller petrol vehicles are ranged against producers of larger electric vehicles (EVs). Another is the overall environmental impact of electric versus petrol vehicles. How the authorities in these contentions could be indicated in the Corporate Average Fuel Efficiency-3 (CAFE-3) norms, expected to be finalised soon. Additionally, the ongoing energy crisis due to the conflict in West Asia brings to the urgent need to look inward, at our own strengths and promote green alternatives such as solar, biofuels and green hydrogen.

The environmental impact of a prod-

uct at its point of use is a small fraction of the overall environmental impact of the system that produces and services the product. Environmental scientist Vaclav Smil has computed the total consumption of non-renewable material and energy resources in modern transportation, food production, and other industrial systems. He explains that electric cars cannot be better than internal combustion engine (ICE) cars until all the energy required to produce them and provide power to their batteries is produced from renewable sources. Till the time the power source from which a car running in Delhi draws power from renewable energy, the use of EVs will continue to pollute the environment. It will merely transfer the burden onto other locations, out of our sight.

The climate crisis has been fuelled by the relentless drive to increase the productivity of economies and improve lifestyles by replacing the use of energy of humans and animals at home with energy extracted from the Earth's resources. Wood fire was the first technological advance of humans over other animals. Coal was the next, a dense source of energy which required more technology but produced more energy.

Then came the extraction of energy from hydrocarbon sources, with which the pace of industrialisation and economic growth accelerated. These combined factors have led to the climate crisis and the search for renewable sources of energy. Even today's Artificial Intelligence algorithms, which are expected to

improve living standards everywhere, are supported by large data centres running on massive amounts of electricity.

There is no escape from the universal law of conservation of material energy. All energy is derived from materials. The amount of energy that can be extracted from materials is limited by Einstein's famous formula.

The Earth is a complex system of materials and energy. The tapping of so-called renewable energies too alters the configuration of the Earth's material structures with long-term consequences. Think large dams, mining done to make components of wind farms, and nuclear waste — all of this alter geology, soil chemistry and, ultimately, the environment, but likely not to the degree that hydrocarbons do. Though immediately reducing the availability of low-cost energy, these large-scale solutions harm livelihoods and lives in the long term. The only additional "new energy" comes from the sun.

The paradigm of economic growth in rich countries is not sustainable. Mankind's global footprint — which is a measure of the pressure human activity exerts on the resources of the Earth — was 60% of the planet's capacity to renew itself in 1960. It has now reached 130%. We are no longer living off the consumption account; we are eating into our natural capital.

The US's footprint on the Earth's resources is as heavy as 9/10 hectares per person. China's is one-sixth of the US. And India's is half of China's. An Indian consumes one-twelfth of the Earth's



The tapping of renewable energies alters the configuration of the Earth's material structures as well, through mining, large dams, etc. REUTERS

resources compared to an American. As encouraging as this statistic is, further use of all possible options — be it CNG, hybrids or smaller cars that reduce consumption of the Earth's resources — should be encouraged.

The United Nations' sustainable development goal, SDG 7, 'aims to ensure universal access to modern, reliable, and sustainable energy by 2030'. Even the poorest human beings are entitled to adequate and affordable clean energy. Herein lies a core problem of 21st century economics. Who will pay for the energy they must have if they cannot pay for it themselves?

Studies show that globally, all major automotive markets such as the US, China, Japan, Korea, and EU, offer regulatory protection to small cars under their emission policy frameworks due to their environmental and socioeconomic value. In contrast, India's linear, weight-based approach penalises lighter vehicles with disproportionately stringent CO2 targets. This creates a structural bias where heavier vehicles with higher emissions comply easily, while small cars with lower emissions fall. Lightweighting, a key decarbonisation strategy, is thus disincentivised.

It will, therefore, be interesting to watch how the ongoing wars, and the recent disruptions in rare earth supply from China or any other external exposure shape automotive and emission regulations. The need of the hour is to provide the customer with multiple low-energy options, and not just mandate EVs, which remain out of reach for the average middle-class car buyer.

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Arun Maitra

Purges in China's PLA and Xi's tightening grip

The annual legislative sessions of the Chinese People's Consultative Conference (CPPCC) and the National People's Congress (NPC) — known as the "two sessions" — concluded on March 12. The annual government report presented by Premier Li Qiang signalled a broader continuity in economic policy while highlighting problems such as local debt and local cadre compliance with central directives. On the political front, however, the most significant event of the "two sessions", was the revocation of the membership of more than a dozen officials of the People's Liberation Army (PLA). This move, predicted by several analysts, comes against the backdrop of a high-profile purge announced earlier this year, of General Zhang Youxia, former Central Military Commission (CMC) vice-chairman and a close ally of President Xi Jinping, and General Liu Zhenli, the chief of staff of the CMC.

What do these purges indicate about the stability of the Chinese political system and about the Communist Party of China (CPC) general secretary and CMC chairman Xi's grip on power?

The PLA purges have created tremors across the CPC. Following January announcements of the two arrests, local- and provincial-level "two sessions" meetings that lead up to the national-level meetings in March pledged to "unite more closely around the Party Central Committee with Comrade Xi Jinping at its core".

In some cases, these expressions of political loyalty may be the result of proactive efforts by lower-ranking leaders to avoid repercussions against those who do not explicitly declare such loyalty. But, by and large, these articulations of support are the result of active mobilisation for Xi by the party-state hierarchy at a politically sensitive juncture. The livestreaming of these online meetings from different levels and senior headquarters of the PLA — a break from the usual practice — on the eve of the Chinese Lunar New Year was a deliberate effort by the PLA leadership to reach out to the rank and file.

Following the 20th CPC Congress in 2022, Xi appeared to delegate responsibilities in key policy areas to trusted loyalists. For example, Premier Li became more active in foreign affairs on Xi's behalf, attending multilateral meetings — Li's attendance at the 2023 G20 summit in New Delhi was a case in point — and meeting foreign dignitaries. Similarly, in other policy areas, such as the economy and ideology, Xi increasingly relied on CPC Politburo member He Lifeng and Politburo Standing Committee member Cai Qi, respectively.

"Inspection visits" by senior leaders to localities and organisations are a regular feature of the CPC political system, aimed at auditing performance and ensuring party discipline; speeches are made and instructions issued at these forums to convey the party line. In the aftermath of the January announcement, Xi has used these mechanisms to indicate a continued ability to impose his will and to be the decisive voice amidst competing views and interests. He, therefore, retains the ability to mobilise and marshal the CPC apparatus. It is surprising, the fact that anti-corruption campaign has run for so long and that practically the entire CMC has been decimated since the 20th Party Congress suggests that despite the tensing of the political system, such purges generate the party-state's "able to find equilibrium quickly."

This equilibrium is the result of strong institutional mechanisms that the CPC's civilian leadership under Xi has put in place. Also, Xi has used these mechanisms to indicate a continued ability to impose his will and to be the decisive voice amidst competing views and interests. He, therefore, retains the ability to mobilise and marshal the CPC apparatus. It is surprising, the fact that anti-corruption campaign has run for so long and that practically the entire CMC has been decimated since the 20th Party Congress suggests that despite the tensing of the political system, such purges generate the party-state's "able to find equilibrium quickly."

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Official media reports suggest that, among other things, it also focuses on selecting the right kind of cadres at the run-up to the 21st Party Congress at the end of 2027. Local CPC, political advisory, and legislative bodies have already started the selection process, which will culminate next year with a new central committee and leadership in China.

Xi's anti-corruption campaign has felled hundreds of senior cadres since its inception in 2013. The first question that arises is whether the campaign is so onerous that it will end only in the top. This might well be possible, but if it is so, it does not logically seem possible that it could have been rooted out completely in the decade and more since the campaign began — even the replacements of those currently purged are likely to be tainted in some way. Xi must have known this about the generals he appointed and must be aware of this for the generals he will now appoint.

The next question is: What do the charges against Zhang Youxia and Liu Zhenli — "serious violations of discipline and law" — mean? Once again, logically, this can only mean either differences of opinion with Xi or an inability to follow his instructions fully or both. This seems reasonable — elite cohesion is difficult in complex political systems at the best of times and perhaps even more difficult when China is a rising power in a world witnessing "changes unseen in a century", as Xi regularly declares. If so, these purges are not a sign of weakness but an indication of civilian supremacy in China and of Xi's desire to ensure that the Chinese military becomes ever more capable of achieving the party-state's political and military objectives.

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Jabin T Jacob

[RICHARD BENNETT]
SPECIAL RAPPORTEUR ON AFGHANISTAN, UNHCR

Urging parties to de-escalate ... and respect international law, including the protection of civilians and civilian objects such as hospitals



After Pakistan's airstrikes in Kabul



New bill marks a regressive turn in transgender rights

The Transgender Persons (Protection of Rights) Amendment Bill, 2023, introduced in the Lok Sabha, proposes to limit the definition of transgender person, undoing years of activism, judicial pronouncements, and legislative action. The problem lies in the suspicion of self-perceived gender identity. In *NALSA v Union of India*, the Supreme Court protected gender identity under Article 21 of the Constitution (dignity and autonomy). It held that "gender identity refers to each person's deeply felt internal and individual experience of gender, which may or may not correspond to the sex assigned at birth. It refers to an individual's self-identification as a man, woman, transgender or other identified category". The bill unsettles this foundation.

What is self-perceived identity? Self-identification is an individual's sense of their own gender. Gender is the way of being, and it determines how one feels, dresses, socialises, or behaves. Gender identity emerges at the interplay of one's understanding of self and societal recognition. If one's biological sex aligns with their gender identity, societal expectations, roles, and responsibilities seemingly align with the person's self-presentation. The issue arises when the sex and gender are not in alignment. This is where the need to affirm an identity for oneself becomes central. Self-determination is a tool to reclaim space that society fails to offer.

Self-identification is different from, and independent of, the bureaucratic process of legally recognising gender identity. Under the Transgender Persons (Protection of Rights) Act, 2019, the district magistrate follows a prescribed procedure to issue a transgender certificate. Further, if a person identifies specifically as a man or a woman, they are required to submit proof of medical intervention. This bureaucratic burden makes it difficult for transgender persons to get an identity card and access essential services.

The Bill aims to protect "a specified class of socially or culturally known as transgender persons who face social discrimination of an extreme and oppressive nature". It states that the existing definition is too broad, thus making it impossible to identify the real beneficiaries. This, apart from the issues explained below, turns a mere administrative inconvenience into an unconstitutional legislative direction.

as those who identify as non-binary, genderqueer. This narrows the scope of who is recognised as transgender and denies them key protections that the Act provides.

To illustrate, going ahead trans men or non-binary individuals, who are already invisibilised within the community, may not be allowed to legally affirm their gender identity or be protected under the Act against discrimination in educational establishments, employment, or denial of goods or services based on their identity. They may not be able to receive the benefits of the State's schemes and welfare measures for trans persons, such as subsidies in housing, free health care and insurance, and support for starting their own small businesses.

The assumption that visibility of the identity guides discrimination ignores ground reality. It forgets that there are invisible, differently marginalised members of a community whose concerns will be completely disregarded should the amendments be passed. Discrimination happens as a result of perceived deviation from gender norms. It is played out in failed job offers, unreasonably high rents, hostile interactions, street harassment, and everyday aggressions. The Bill ignores that a self-identified trans man or woman will not stop living merely because of legal non-recognition, but rather, the discrimination will continue precisely because of the lack of protection from the State.

Finally, the offences and penalties focus on "compelling" a person or a child to dress or present as a trans person, or causing bodily injury through any medical or surgical procedures. While the intention is understandable, consultations with the community suggest concerns about how these provisions operate in practice. In several instances, older trans persons who shelter runaway minors or individuals facing violence from their natal families or society have been penalised, with complaints leading to threats, harassment, or prosecution. It is important to carefully define these offences and their essential ingredients. This is to ensure that where an individual consents to and actively seeks gender affirmation or shelter with another trans person, third parties cannot misuse the law to initiate complaints or create legal difficulties. This will require the sensitisation of police and judges.

The Bill thus violates NALSA, pushes gender rights in a regressive direction, and leaves the trans community more vulnerable than before.

Shireen Yachru and Jwalika Balaji are research fellows at the Vidhi Centre for Legal Policy. The views expressed are personal.



Shireen Yachru



Jwalika Balaji

Testing times for edtech

Deals and funding remain scarce

Upskilling firm UpGrad's offer to buy edtech platform Unacademy in an all-stock deal has raised a glimmer of hope for a business that has been floundering since post-lockdown back-to-school mandates dented their business models. A funding winter since 2022 is yet to show signs of receding. The collapse of Byju's, India's first high-profile edtech unicorn, amid accusations over questionable corporate governance and irregular practices, has dimmed the sector's allure. The post-pandemic struggles of platforms such as Unacademy and Noida-based Vedantu, once race-horses, have not helped the sector's cause, either.

The latest deal is UpGrad's second offer in two months. Talks in January fell through after differences over valuation surfaced. Co-founded by entrepreneur and film-producer Ronnie Screwvala, UpGrad is said to have proposed an all-stock valuation of \$300 million. This was significantly lower than the \$2.25 billion that Unacademy's investors were seeking and substantially below its peak valuation of \$3.4 billion in 2024. In 2024, Unacademy's talks with Kota-based test-preparation major Allen Career Institute fell through for similar reasons. The potential revival of the deal (only a term sheet has been signed) should not, however, suggest that the sector is headed for recuperation. Future deals are unlikely to take place at the kind of headline-grabbing valuations of 2021 and 2022.

The outlook among investors is that raising fresh rounds of investment would entail promoters taking substantial haircuts (which the UpGrad-Unacademy deal implies). In 2024, a small bump in edtech funding raised hopes of the funding winter coming to an end. But in 2025, the number of deals is reported to have dropped to 31 from 48 in 2024 — way below 172 in the 2021 boom year and 95 in 2022 — and the lowest in a decade. Funding dropped from \$572 million in 2024 to \$240 million in 2025 — again, a steep fall from \$4.78 billion in 2021 and \$2.44 billion in 2022. The stock-market performance of Noida-headquartered PhysicsWallah, which became the first edtech to list, reflects the outlook. After listing in November last year at ₹145, the share now languishes at ₹80-86.

In many ways, the edtech sector exemplifies the perils of poor strategic thinking both by entrepreneurs and private-equity (PE)/venture-capital (VC) investors. Most edtech platforms revelled in hyper-growth during the pandemic years in the K-12 (kindergarten to Class 12) space as brick-and-mortar schools remained closed during the lockdown, riding high on ever higher valuations from PE/VC investors. Unsurprisingly, they struggled for relevance in the post-pandemic period, when schools reopened. Those in the test-preparation and coaching business have been unable to compete against experienced brick-and-mortar institutes. Both Byju's and Unacademy burned cash while attempting a hybrid online/offline model, vigorously acquiring startups, and expanding at a pace that ultimately impacted quality control. Falling profitability, layoffs, and restructuring inevitably followed. Investor preferences, too, seem to gyrate. In the post-pandemic era, upskilling, higher education, and professional learning were considered the more profitable options for edtech investment. Now, the advent of artificial intelligence is seeing investors pivot towards K-12 education, in which the ability of platforms to offer personalised education to school students will emerge as a key differentiator. But here, too, the funding thaw is yet to be seen.

Creative opportunities

India is moving up the value chain

Netflix recently launched a facility of Eyeline Studios in Hyderabad, underscoring that India's animation, visual effects, gaming, and comics (AVGC) industry is moving up the value chain. Equipped with advanced visual effects and virtual-production infrastructure, the centre will function as part of Eyeline's global network, which includes Los Angeles, Vancouver, London, and Seoul. For India, the significance lies not only in the physical investment but also in what it signals. Global studios now see the country not merely as a low-cost outsourcing base but as a location capable of contributing to high-end digital storytelling and production pipelines. Hyderabad's emergence as the site of this investment is itself revealing. As it is, the city hosts a mix of technology firms, film studios, and visual-effects companies, providing the creative and engineering capabilities required for a modern production ecosystem. The arrival of Eyeline reinforces the role of such clusters in shaping the next phase of India's creative industries, where film culture, digital technology, and global content demand intersect.

The larger opportunity lies in the rapid expansion of the AVGC ecosystem. India's media & entertainment sector was estimated at around ₹2.5 trillion in 2024 and is projected to reach about ₹3.17 trillion by 2027. Digital media already accounts for a growing share of revenues as streaming platforms, gaming networks, and creator-driven platforms reshape the way content is produced and consumed. Within this landscape, the animation & visual-effects segment alone generated about ₹10,300 crore in 2024 and is expected to grow at a healthy pace. Gaming, another pillar of the AVGC framework, too, is expanding at a fast pace. India's large base of smartphone users and a young population make it one of the world's largest gaming markets by user numbers. Equally important is the sector's employment potential. The government estimates that the sector could require close to two million professionals by 2030, reflecting its labour-intensive nature. Unlike many traditional sectors, AVGC combines creative skills with advanced digital capabilities, generating opportunities for artists, coders, designers, and engineers simultaneously.

The government also recognises the need for a dedicated talent pool. In the 2026-27 Union Budget, for instance, support has been proposed for the Indian Institute of Creative Technologies in Mumbai, with plans to establish AVGC content-creator labs in 15,000 secondary schools and 500 colleges across the country. The aim is to integrate animation, gaming, and digital storytelling skills with mainstream education and expose students early to emerging technologies. The convergence of artificial intelligence (AI), immersive technologies, and digital platforms is accelerating this transition. AI-assisted editing, multilingual dubbing tools, generative design systems, and virtual production environments are shortening production cycles while expanding the reach of content across languages and markets. For a country with deep storytelling traditions and a large pool of technically trained workers, this offers an opportunity to move further up the value chain of the global entertainment business. The entry of global studios such as Netflix into India's AVGC ecosystem highlights that creative technology is capable of generating export revenues, high-skill employment, and new forms of digital intellectual property.



When resolution becomes recovery

A collective resolution framework is being repurposed into an enforcement mechanism

The Insolvency and Bankruptcy Code (IBC), 2016, promised a decisive break from India's creditor-driven, enforcement-heavy approach to corporate distress. It was conceived as a framework for rescuing viable businesses, preserving enterprise value, and resolving financial stress collectively. Overtime, however, the Code has steadily morphed into the country's most potent debt recovery tool. The dominant narrative today is not how much stress the IBC has resolved, but how much money it has recovered.

This narrative is reinforced by official data. Central Bank reports highlight that the IBC delivers the highest recoveries among all mechanisms, an average recovery rate of 37 per cent, compared to 32 per cent under Sarfaesi, 30 per cent through debt recovery tribunals (DRTs), and 2 per cent via Lok Adalats in 2024-25. The IBC alone accounted for 52 per cent of total bank recoveries in that year. Most publications foreground realisations by creditors under resolution plans. Public discourse and media coverage focus on "haircuts" as the primary metric for assessing the performance of the IBC.

This framing is deeply misleading. It glorifies recovery for what the IBC was never intended to be. The data is often cherry-picked, while critical qualifiers are ignored — that recoveries under the IBC are over and above the rescue of companies, which remains the Code's prime objective. The by-product of the IBC is compared with the primary output of other mechanisms: recoveries under resolution plans are highlighted, while the meagre recoveries through liquidation are overlooked; and outcomes for financial creditors dominate the narrative, masking the abysmal recoveries experienced by operational creditors.

This distortion is disturbing because the IBC is not a recovery legislation. On the contrary, once insolvency proceedings are initiated, the Code imposes a moratorium on all recovery actions, signalling a clear legislative departure from enforcement-driven out-

comes. The statutory architecture is unambiguous. Section 65 explicitly penalises the initiation of insolvency proceedings for any purpose other than the resolution of insolvency.

The Supreme Court clarified that the inception of the Code. In *Swiss Ribbons Pvt Ltd*, it characterised the IBC as a beneficial legislation intended to put the company back on its feet. It reiterated in *M/s HFCZ Bio-Fuels Ltd (2024)* that recovery in insolvency proceedings is only incidental to resolution, not the main relief. This understanding aligns with the Unclit Legislative Guide on Insolvency Law, which emphasises that insolvency law is not a means of debt enforcement.

Yet the gap between statutory command and operational reality has become a chasm. Two factors primarily explain this. The first is Section 29A. Of the ₹6,659 cases admitted into the corporate insolvency resolution process (CIRP), only about 1,300 have culminated in approved resolution plans. Meanwhile, nearly 30,000 cases, involving ₹14 trillion of debt, were withdrawn before admission. For every one case resolved through a plan, roughly 25 were withdrawn at the threshold. The ratio would be starker if cases dropped before or after the issue of notice of intent to trigger CIRP is included. There are also withdrawals after admission with the approval of the committee of creditors (CoC).

These withdrawals do not reflect the resolution of stress. They reflect settlement outside the CIRP, or in its shadow. Section 29A, which renders many promoters ineligible to submit resolution plans once CIRP commences, creates a powerful deterrent. Faced with the existential threat of insolvency admission and likely loss of control, promoters often settle. The Code thus becomes leverage, an effective stick for extraction rather than a framework for restructuring. Though Section 29A warrants calibration, its deterrent role is undeniable. The problem lies not in its existence, but in how the ecosystem exploits it.



RAGHAV PANDEY & M S SAHOO

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Annual reports that matter

The annual report remains the most comprehensive communication between a company and its shareholders. As companies prepare their reports, the temptation is to complete the rituals for yet another year gone by. Financial statements; Compiled; The board's report; Assembled; Governance disclosures; Slotted into familiar templates. Designer; Engaged; Report; Despatched. The boxes are all ticked.

As Indian companies prepare their FY26 annual reports, they should treat the process as more than a compliance exercise. It is a test of whether boards view disclosure merely as a legal requirement or as an opportunity to build trust.

The baseline is set by the Companies Act, 2013, and the disclosure framework prescribed by the Securities and Exchange Board of India (SEBI). Financial statements must be accompanied by granular notes. Related-party transactions require transparency and audit committee oversight. Corporate governance reports must detail board composition, committee meetings and remuneration structures. The Business Responsibility and Sustainability Report has brought environmental, social, and governance (ESG) metrics into the mainstream. It is obvious that regulators have steadily expanded the scope of mandatory disclosure, yet this rising regulatory volume has not always meant that annual reports are useful to their users.

The question companies must ask themselves is what can they disclose better? Start with the financials. Accounting standards may prescribe recognition and measurement, but clarity is a choice. Do companies explain what drove margins? Do they disaggregate revenue meaningfully? Do they discuss capital allocation decisions with candour — particularly where returns have lagged?

A company showing two years of falling margins doesn't give investors the information they need. They want to know whether input cost, inflation, capacity under-utilisation, or product-mix shifts drove that trend — and what management is doing about it. Boilerplate

statements lack the credibility that specificity builds. Move to governance. Annual reports are replete with declarations that the board has "reviewed" risk management systems, "evaluated" performance and "ensured" compliance. Shareholders would benefit from knowing how. What were the key risks debated during the year? Outcome of the board evaluation. Broad thoughts on succession. Governance is no longer a checklist.

Sustainability reporting, too, is at an inflection point. Emissions data, water intensity, and diversity ratios are now table stakes for large listed entities. The next step is integration. How do climate risks affect capital expenditure? How does attrition affect productivity? ESG metrics should migrate from annexures to the strategic core of the report. Indian corporations like those in the renewable energy or consumer goods sectors already disclosing greenhouse gas emissions, water-use intensity, and supply-chain audits. But the next frontier is connecting these metrics to financial outcomes. How does water scarcity in key manufacturing hubs affect production forecasts? Does supplier non-compliance with heavy fines impact risk brand reputation and hence sales?

Risk disclosure remains the weakest link: a risk section that reads like an insurance policy disclaimer does not serve its purpose. References to "macro-economic headwinds" and "intense competition" offer little insight. Investors are better served by an honest articulation of concentration risks.

Forexample, supply-chain fragility — an auto parts manufacturer with heavy reliance on a single supplier could disclose efforts to diversify sourcing, expanded timelines, and capex implications. Disclosure around geopolitical factors — tariffs, trade disruptions, supply-chain volatility — is rising sharply in other markets because investors demand real, company-specific context about how such issues affect operations.

The annual report also needs to reflect the digital age in which the company operates. Artificial intelligence (AI) and cybersecurity are no longer niche boardroom topics. Leading companies are disclosing

The second driver is the approach of financial creditors who comprise the CoC. These creditors possess sophisticated recovery machinery and a longstanding bias towards liquidation, each over patient value maximisation through business turnaround. Recoveries under resolution plans are typically front-loaded; creditors rarely wait to realise value from post-resolution performance. This institutional disposition enables, and arguably legitimises, the perversion of the Code's purpose.

Together, these two factors allow creditors, both financial and operational, to weaponise the IBC for recovery rather than resolution. The pattern is fairly clear. Promoters frequently wait until CIRP admission before negotiating settlements, as acknowledged in *Glas Trust Company LLC (2024)*, where the Supreme Court criticised attempts to bypass Section 12A through private settlements.

As a result, the insolvency application has become the opening salvo in negotiations: File first, negotiate later. The credible threat of CIRP admission, with its attendant reputational damage, collapse of credit lines, supply-chain disruption, and talent flight, concentrates the debtor's mind wonderfully. From the perspective of an individual creditor, this strategy may appear rational. Why engage in protracted restructuring negotiations when an IBC filing is so effective in extracting payment?

This is, however, corrosive for the system. The IBC was designed to address collective action problems and prevent a race for enforcement that destroys going-concern value. We are witnessing the opposite: Creditors racing to the courthouse not to preserve enterprise value collectively, but to secure individual recovery.

The Bankruptcy Law Reforms Committee assumed that insolvency would be triggered only after serious deliberation and exhaustion of bilateral options. That assumption has proved spectacularly wrong. The insolvency petition is no longer the end of negotiation; it is its enforcement. Even when resolution succeeds, the damage inflicted during the process often leaves lasting scars.

The consequences are perverse. Solvent firms facing temporary liquidity stress can be dragged into CIRP for a single missed payment, while deeply insolvent firms may be ignored because there is nothing to extract. This drift must be arrested before it hardens into institutional culture. Once judges, practitioners, and creditors internalise the IBC as a recovery tool, revival will be exceedingly difficult. The ecosystem will inevitably orient itself around extraction, not rescue.

The IBC trajectory will shape India's credit markets, investment behaviour, and economic growth for generations. Section 65 reflects Parliament's clear intent: Insolvency proceedings are for resolution, not recovery. Whether that intent is honoured depends less on legislative tinkering and more on a fundamental change in creditor approach. If that change does not come soon, the opportunity for course correction may be irretrievably lost. The choice is stark: A genuine resolution regime or a highly efficient recovery machine masquerading as insolvency law. The window is closing.

The authors are, respectively, assistant professor and former distinguished professor at National Law University, Delhi

A 200-year saga of Indian bulls and bears



BOOK REVIEW

SANJAY KUMAR SINGH

Stock trading in India began long before a formal stock exchange came into being. Newspapers such as the *Bengal Hurkaru* and *Chronicle* were publishing bid-offer prices for shares in the early 19th century. That long, uneven evolution is the subject of Adil Rustomjee's substantial and deeply researched book, an 862-page account that traces the history of Indian markets from their informal beginnings under a banyan tree in Bombay to the modern era of electronic trading. The book vividly reconstructs the first great speculative episode in India. The

bull run of the 1860s was set off by the American Civil War, which disrupted cotton supplies from the American South to English mills and sharply increased the demand for Indian cotton. The resulting profits unleashed a feverish boom in Bombay. Shares of newly floated banks, financial associations, and land reclamation companies soared. Inscale and speculative intensity, the episode rivalled Britain's South Sea bubble and the Dutch tulip mania. In an environment devoid of regulatory checks, banks and financial associations amplified the frenzy by lending against inflated share prices. Market activity peaked between July 1864 and April 1865. The collapse, when it came, was equally dramatic. Speculators, carried away by the euphoria, failed to reckon with the obvious reality that the American Civil War would eventually end, and with it the higher demand for Indian cotton. Robert E Lee surrendered on April 9, 1865. When the news reached

Bombay on May 1, it sparked off a brutal crash. Banks and business houses came under severe strain. Many collapsed. Mr Rustomjee, who studied international relations at Johns Hopkins and business at Yale, is well placed to tell this story. He was drawn to the subject after chancing upon the BSE (Bombay Stock Exchange) archives and realising that a vast, underutilised treasure trove of Indian market history lay waiting to be organised into a definitive narrative. What emerges is not merely a chronology of trading practices, but a fuller illustration of trading history of how a market evolves, resists reform, adapts under pressure, and slowly acquires legitimacy. The Native Share & Stock Brokers' Association was formed in Bombay on July 9, 1875. It represented a decisive step towards establishing a formal exchange. A turning point came with the initial public offering (IPO) of Tata Iron and Steel Company. When the Tatas sought

capital in 1907, London bankers refused to back what they regarded as a doubtful native enterprise. The Tatas managed to raise about ₹2.3 crore in India. It marked an important stage in the growth of large-scale share issuance by limited-liability joint-stock companies in India. The stock markets, however, remained marginal for most of the 20th century. Under colonial rule, and for two generations after Independence, slow economic growth and limited public participation kept the market at the periphery of economic life. Serious institutional development came only in the final decade of the 20th century, after which activity rose sharply. Among the book's most valuable contributions is its detailed treatment of *badla*, the uniquely Indian trading mechanism that the author describes as an "unmargined naked forward". Positions could be initiated without capital, margin or ownership of the underlying stock,

making *badla*, a highly leveraged wager. With no initial capital committed, gains could be enormous. So, too, could losses. A trader could square up, take delivery or carry a trade forward into the next settlement period by paying an interest cost known as the *badla* rate. It was the most dominant form of trading for much of Indian market history. The later sections extend the story into the modern institutional era. No formal stock index existed for the first century of the market's existence until the Sensex was created in 1986, with 1978-79 as the base year. The role of the Controller of Capital Issues, which distorted IPO pricing by keeping them close to face value; the creation of the Unit Trust of India in 1963 and the launch of Unit Scheme 1964, which faced recurrent problems due to its promise of guaranteed returns on an equity-backed product; and the FERA (Foreign

Exchange Regulation Act, 1973)-driven dilution of multinational shareholdings in 1978 which led to a bonanza for Indian investors who received shares of blue chips at very low prices — all are recounted. Dhruvambani's role in bringing ordinary Indians into the equity market and the deep financialisation of the establishment of the National Stock Exchange make for compelling reading. At a time when household savings are shifting from bank deposits to mutual funds and equities, the book offers an essential historical perspective. It explains how India moved, in start-and-stop fashion, from a speculative, opaque marketplace to a cleaner system that gives ordinary Indians a shot at creating long-term wealth. Anyone keen to understand this evolution, and the institutional struggles that made it possible, should make the effort to read this weighty tome.

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Running behind Lakshmi: The Search for Wealth in India's Stock Market by Adil Rustomjee. Published by Hachette India. 862 pages, ₹1,999.



CONTRAPUNTO

Better to reign in Hell, than to serve in Heaven - JOHN MILTON, Paradise Lost

Hubris, Then Nemesis

Being blind to the limits of power, seems to come with the territory of having a lot of it. Look at geopolitics

As it went with tariffs, so it's going with Iran war: Trump's my way or the highway posture, reduced to a bad joke. On the war front, not only have developments in Iran defied his prognoses, other nations are refusing to fall in line. Spain has nixed the use of military bases located in its territory for US operations. It's called the war illegal, and contrary to the interests of humanity. Nato countries are also ignoring his threat of "a very bad future," if they don't send warships to help reopen Strait of Hormuz. Even lackey-like, UK is refusing to be "drawn into the wider war". Germany's defence minister has mockingly asked: what does Trump expect from European frigates, since the mighty US navy can't manage it either?

With tariffs, Trump ridiculed different countries as pleading to him, "Please, please sir make a deal. I'll do anything. I'll do anything, sir." This haplessness is, of course, not the whole story. China played hardball with its rare earths card. Others showed resilience not so much by resisting power, as rerouting around it, starting to reduce their exposure to Trump's volatility. Even right now, India is stepping up diplomatic engagement with Iran, to secure its energy supplies through Strait of Hormuz. However much Trump can destroy and dominate, he cannot control outcomes. Or foreclose others' choices.

But this is not just about Trump. Being blind to the limits of their power, seems to come with the territory of having a lot of it. Hence, the continuing salience of hubris in different biographies of power. Indira Gandhi pulled off an Emergency, but then was shocked by a dramatic electoral blow. Lance Armstrong was invincible, until he wasn't. Harvey Weinstein was the king of Hollywood, and then he was in jail. Power doesn't see reversals coming. Its Goliath can't see David standing up to it. Just as Trump didn't see a "fools and lapdogs" (his words, obviously) US Supreme Court giving his tariffs a 6-3 slapdown.

And still, Trumpism runs unrepentant. There is talk of Cuba, now. In ancient Greek thought, hubris is more than arrogance. It isn't merely a personality flaw, but a violation of cosmic and social order. And its story arc often goes like this: power—hubris—nemesis. History books may tell US, it helped establish democracy in Japan and Germany. But its 21st century regime change wars—Iran, Libya, Afghanistan—don't have such nice giftwrapping. Acting like US has infinite resources, and the ability to impose its will on others, is actually a self-goal.

No Sides? No Problem

Paltrow, at the Oscars, showed, in her silhouette, what it takes to hold it together

Who won the Oscars is for movie nerds. For the rest, Academy Awards is a spectacle. Sheer fashion theatre—where stars flaunt brand identity and nominees conceal nerves, in all manner of dress. For Hollywood, there can be nothing worse than the audience forgetting what you wore. Better to be roasted by the internet, than not to be noticed at all. And so, this year, the star of the show was no nominee, meh, but 53-year-old Gwyneth Paltrow, in a strapless minimalist ivory Armani dress—with cutout sides—on stage as presenter. The dress's opening was covered by sparkly mesh fabric, or was it tulle pants—it mattered not. Because, for all purposes, it had no sides, and was held together by sheer stardom, a striking silhouette.

Paltrow returned to cinema after nearly a decade, having stepped back to focus on her wellness-lifestyle business. In interviews, the now 53-year-old has said she was "very, very rusty" and "petrified", when she first arrived on the film set of her comeback film, *Marcy Superstar*, doubting even her ability to act again. The cutout sides highlighted that precarity. Yet she was seamless with confidence as she walked, moved, sat, climbed stairs—giving internet, even more moments of, ooh, was that almost a wardrobe malfunction, or was it deliberate?

And that's just what holding it together is all about. To keep going when a moment can turn messy, even overwhelming. Not about never falling apart, but to get a grip on response, boardroom to stardom, relationships to family life. Yawn? Not quite. It's the power of personality. Of ability to make a statement without a word. Of endurance, fitness. Paltrow's dress was strategy, not drama. No ruffles, no cleavage, no trains, no gold, no glitter, just announcing that, nerves or not, hold it together. And you will be the force to reckon with.

War and peas

The US-Israel offensive against Iran has invaded the great Indian kitchen

Jug Suraiya



Much to its indignant distaste, India is willy-nilly getting a taste, literally of the conflict raging in Iran and neighbouring countries. Iran's blocking of Strait of Hormuz, which overnight has become an international buzzword, and through which a great deal of oil and other vital supplies pass, has meant that the West Asian conflict has invaded our country's kitchens. The real, or rumored, conflict-generated shortage of LPG cylinders used for cooking, among other things, has not only led to the closure of many small eateries across the country but also affected households, as distant warfare determines the war-affected fare that tillies get to eat again. Print and social media abound with tips and suggestions about methods of cooking and recipes, which obviate reliance on the errant LPG.

Are induction cooktops better than infrared cooktops? A moot point of much mootness, which is compounded by the fact that no one seems to know what an induction cooktop is, or how it works, and much the same goes for the infrared option, which, moreover, conjures unintended associations with infra dig, denoting inferior or undesirable status.

Which of these LPG-replacing gizmos can make rotis? North India wants to know. Man does not live by roti alone, admonishes South India, and demands to ascertain which one makes better dosas.

Both North and South commiserate with each other that neither can make pakodas or vadas, or indeed anything at all that involves deep frying, including that perennial pan-Indian favourite called Veg Manchurian. Stick to salads, which necessitate no cooking, exhort health enthusiasts, provoking the righteous rejoinder that lettuce nor talk such nonsense about ghaas-phoos, which is more phoos than ghaas.

And for what it's worth, it's cold comfort to reflect that come the mid-term American polls in Nov, Operation Epic Fury with its inflationary impact on the price of gasoline in the gas-ravenous US is likely to have a boomerang culinary effect on POTUS and his MAGA devotees, who are made to swallow setback and eat humble pie.

Why Trumpian Hegemony's In Trouble

Iran war is bringing out stress points in his coercive unilateralism. Latest example: his counterterror chief has quit. Post-WW2 elite consensus on American dominance is thinning, globally & in US

Interject Parmar



Trump's second term starkly illustrates a rapidly intensifying imbalance, between consent and force in America's hegemonic strategy. Historically, US favoured waging a patient struggle for hearts and minds, through soft power. Trump's escalating military campaigns, however, exemplify coercion without restraint. But how far can Trump push such a coercive strategy, and what restraints, if any remain on a president, who seems to have dismantled the guardrails of American liberal democracy? Trump's actions signal not just geopolitical adventurism, but a profoundly risky reconfiguration of US hegemony. One that may further alienate allies, erode domestic consent, and ignite counter-hegemonic forces globally. Given Trump's ego-driven persona, we should be prepared for wars to continue.

The 'imminent threat' argument | Trump's illegal Iran offensive began with precision strikes on nuclear facilities, escalating to attacks on missile sites, and naval assets. While disputed by Trump, strikes also included an Iranian girls' primary school, killing 165 children. China has also neutralised an unprovoked "imminent threat". Trump has refused to rule out ground troops or regime change. However, Trump's director of National Counterterrorism Center, Joe Kent, resigned yesterday, saying he could not back the Iran war because the country posed no imminent threat to US. Trump, so far, has ignored this development. But this is part of a pattern in his second term, where he has ordered strikes in Somalia, Gaza (bolstering Israeli operations), Venezuela, and the Caribbean. He has also threatened to secure Greenland.

This represents a shift from post-World War II US hegemonic methods, built on consensual alliances, via institutions like Nato and UN, to a coercive unilateralism. The America First doctrine seeks to manufacture domestic consent for these manoeuvres, by portraying them as defensive necessities against "radical regimes".

Yet, this is US hegemony in crisis: the liberal international order, once sustained by elite networks of foundations, think tanks, and organic intellectuals, is fracturing under Trump's assault.

Big power games | How far can Trump take these wars? Hegemony endures through a careful balance of force and persuasion. Trump's campaigns, however, could expand into full-scale regional conflagrations, drawing in Qatar and Saudi Arabia. In fact, Trump's war strategy could extend far longer than rationally necessary as he leverages the post-9/11 Authorization for Use of Military Force (AUMF), to bypass Congress, stretching executive power to authoritarian lengths.



A total war of destruction on Iran, however, profoundly threatens Russian and Chinese interests—disrupting Beijing's discounted oil supplies, endangering shipping through Strait of Hormuz, and potentially drawing Moscow deeper into West Asia entanglements. Both countries have condemned the strikes as aggression, but offered only restrained diplomatic support to Tehran. Neither Russia nor China seeks direct confrontation with a US demonstrating overwhelming force.

Still, Trump, ever the dealmaker, may work to limit the conflict to degrade Iran's capabilities, without triggering broader great-power involvement, which could embolden counter-hegemonic blocs, or complicate his transactional diplomacy with Xi and Putin.

Resting counter-pressures | Yet, contradictions in Trump's art of the deal transactional approach, are mounting. Witness Trump's flip-flops on allies, as well as on stated adversaries. After denouncing Starmer for rejecting military support for the war on Iran, he has requested allies, as well as China, to send warships to Strait of Hormuz. He has also requested allies, as well as Trump's approval ratings suffer.

Hence, restraints are mounting, driven by fissures within Trump's own coalition. Even his MAGA base and its ideologues, wary of endless wars, are rejecting this military interventionism. Polls show Trump's core supporters, who cheered America First as a pledge against Bush-era entanglements, now denounce the betrayals in Gaza, Venezuela, Greenland, and especially Iran. Influential voices like Tucker Carlson, and Vance surrogates, have publicly criticised escalations as draining resources from domestic priorities. This could possibly hand Democrats major Congressional gains later this year.

Force and political scarecrows | True, Trump's coalition—corporate elites, populist nationalists, and military-industrial interests—will likely still challenge the neoliberal consensus, by using coercion where consent falters. Ultimately, Trump's wars will extend as far as fractured consent allows. However, with MAGA defections, midterm perils, mass protests, and the spectre of great-power backlash, constraining escalation, Trump's hegemony may crumble.

Even if Trump can mobilise a large part of his MAGA base through portrayals of Iran as an existential antagonist, elite cohesion is thinner than during earlier interventions. Internationalist intelligibility gap is wide and allies are less willing to fall in line.

The structural machinery for consent still exists. Yet, its capacity is diminished. Fragmented institutions, polarised publics, and global scepticism limit how far any administration can go. It may simply be too late to recreate a US-led fully manufactured consensus of the old kind.

Lead Atomic Clock In Space...Scary Thing On Ground

From Kargil War to Op Sindoor, India has learned that an indigenous navigation system is critical for its security. But the four-satellite constellation needed for this, is now down to three. NavIC needs urgent medicine

Nithyanandam Yogeswaran



On 13 March 2026, Isro announced that the atomic clock aboard IRNSS-1F had stopped working, with the satellite completing "its 10-year mission life". While the phrasing was restrained, the impact is worrying. India's homegrown satellite navigation system, born in response to the hard lessons of the 1999 Kargil War, is now under severest threat. Since 2013, India has launched 11 NavIC satellites, but only three are now reported to provide core navigation services, falling short of the minimum of four needed for reliable positioning.

This is what makes navigation satellites fundamentally different from Earth observation satellites. PNT (position, navigation, timing) services work only when several satellites operate together as a live constellation. Because a receiver must simultaneously "see" at least four satellites, to calculate location, altitude, and time reliably. With only three satellites, it is possible to determine only two-dimensional coordinates (location).

Operational navigation systems like GPS, GLONASS, Galileo, and BeiDou have all built large constellations, with dozens of satellites, to get coverage across the globe. In satellite navigation, the constellation is not part of the support infra. It is the core architecture. At the centre of every navigation satellite is an atomic clock, which provides the precise timing from which all positioning data is derived. If that clock fails, the satellite may still be in orbit, but it can no longer provide reliable navigation. NavIC has faced several such clock-related setbacks over the years, though this is by no means unique to India.

Europe's Galileo also experienced clock anomalies in 2017. Still, the system absorbed them through strong onboard redundancy, refurbishment measures, and a wider second-generation effort to broaden Europe's clock technology base. China appears to have taken a different path, steadily moving BeiDou towards domestically developed improved rubidium clocks, and passive hydrogen masers, backed by a broader redundancy approach for service continuity. India's own response began to move in that direction in May 2023, when NVS-01 (first of the second-generation

navigation satellites) became the first NavIC satellite to carry an indigenous rubidium atomic clock, developed by Isro. With a 12-year design life, it appeared to mark an effort not just to replenish the constellation, but to strengthen its technical resilience.

The present strain is not due to clock failures alone. Difficulties in replenishing the constellation on schedule, including launch-related setbacks, have also weakened NavIC's continuity. What is more worrying is that, of the three satellites currently operational in NavIC, only one is from the second generation, while the other two are nearing the end of their operational lives. This situation creates an urgent need for replacements, to keep the system functioning.



NavIC's issue is not just Isro's problem; it touches systems already spreading across transport, rail, fisheries, and timing infra. Over 10,400 locomotives are equipped with real-time train-tracking systems, over 40,000 fishing vessels carry NavIC receivers, and more than 15L vehicles already use certified NavIC-enabled tracking devices.

In a country with large agri lands, which has started to benefit from precision agriculture and an impressive digital economy that processes billions of UPI transactions a month, sovereign PNT is critical infra. For civilian smartphones, NavIC is an add-on

navigation system that improves accuracy especially as GOI mandates NavIC support for millions of smartphones, manufactured in India starting 2025.

NavIC's strategic importance lies in reducing India's dependence on foreign-controlled navigation in a crisis. Way back in Kargil, reliance on foreign-controlled GPS was exposed as risky, when US reportedly declined to share precise data for the conflict zone. Operation Sindoor later reinforced the value of indigenous precision and networked military systems, even if NavIC's exact operational role isn't deliberated openly. What is not in doubt is that NavIC was designed to give India independent PNT capability, including an encrypted service for authorised users, and that such capability depends on at least four working satellites.

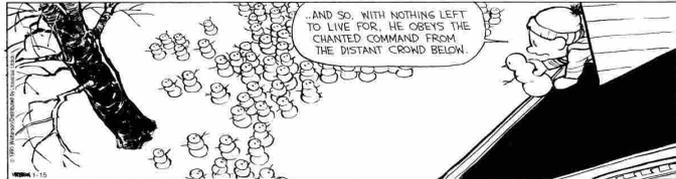
When it comes to its adversarial capabilities, Pakistan is solely dependent on GPS for its military operations. BeiDou was launched in 1994, and reached global service by 2020. China claims it supports more than 1tn location-service requests per day, contributed \$575.6bn in satellite-navigation output in 2024, and offers service in over 140 countries. This dictates the economic value that a functional navigation system can bring, and its geopolitical sphere of influence.

Finally, here are the four key aspects to consider: The most immediate priority is stabilising what remains of the current constellation, whilst simultaneously accelerating the NVS replacement pipeline, because restoring continuity requires both holding the line today and replenishing it tomorrow. Second, complete atomic-clock indigenisation at scale: NVS-01 has already shown the path with an indigenous rubidium clock. Third, build a stronger NavIC ecosystem across chips, receivers, standards, developer tools, and expedite the geodetic reference framework, envisaged in National Geospatial Policy Fourth, upgrade the system through better ground infra, improved signal processing, anti-jamming protection, and regular performance monitoring.

Isro has already demonstrated how NVS-01 that the technical foundation exists, including an L1 service, an indigenous clock, and a 12-year design life. What NavIC needs now is sustained follow-through across the above fronts, given the serious needs of critical national infra.

The author heads the Geospatial Research Programme, Takshashila Institution

Calvin & Hobbes



Arirang: When Nationalism Goes Cultural

Narayanan Ganeshe

Post their military service hiatus, the K-pop band, BTS, after 'disappearing' from public gaze for three years, are making a comeback with their new album, titled *Arirang*, to be released on March 20. Fans are waiting with bated breath for their world tour's kick-off concert, to be held in South Korea's Gwanghwamun Square, on March 21. So why did they and their agency choose this title, and what does *Arirang* mean?

Arirang is basically a folk song, of which there are multiple variations, themed on romantic longing and reunion, linked to Korean nationalism as a cultural sentiment rather than as a territorial or geopolitical stance. According to Unesco, there are about 3,600 variations of 60 different versions of the song, and these are composed of collective contributions of ordinary Koreans over decades. More than ten years ago, South Korea applied to Unesco to register *Arirang* as an Intangible

Cultural Heritage of Humanity, and a couple of years later, North Korea did the same. That BTS chose to open their year-long global concert tour with *Arirang* as their theme, indicates that cultural identity, more than political, religious, or any other identity, is precious and is sure to evoke positive emotional response. Invoking this cultural sentiment is the way to the heart of millions.

During the Japanese occupation of Korea, patriotic songs and national anthem were banned—it was *Arirang* that gave unofficial expression to their resistance. Curiously, *Arirang* songs became a craze in Japan as well, as a reflector of Korean culture, giving birth to even more variations and cultural fusion.

According to *flowable.me* website, "Cultural pride refers to the appreciation, respect, and celebration of one's cultural heritage and identity. This term embodies the positive feelings individuals or groups have towards their traditions, values, and history, fostering a sense of belonging and community. In many instances, cultural pride is expressed through art, literature, music, and other forms of creative expression that highlight unique cultural experiences." Language is an important part of culture, which is why Tamils get all riled up if anyone tries to trivialise or dismiss what is believed to be the world's oldest living language. Tamil poet Valarmuthu, recent recipient of the Jangam Award, said: "To understand South India and its culture, you need Tamil and you need Sanskrit to understand North Indian culture." The people of every region take immense pride in their respective language, as it is their mode of expressing literature, art, and a whole lot of other cultural aspects.

What then, is the difference between nationalism and culture? While cultural

Sacredspace



Arirang: When Nationalism Goes Cultural

Nationalism, in my opinion, is nothing more than an idealistic rationalisation for militarism and aggression. Albert Einstein

pride is about shared heritage, nationalism is aggressive allegiance to a nation with territorial boundaries designated by political authority, and there is a term that combines culture and nationalism—'cultural nationalism'. "Cultural nationalism generally refers to ideas and practices that relate to the intended revival of a purported national community's culture. If political nationalism is focused on the achievement of political autonomy, cultural nationalism is focused on the cultivation of a nation," writes Eric Taylor Woods of University of Leeds. The more evolved notion would probably say we should transcend patriotism, nationalism, religion, and culturalism, even cultural nationalism, if we are to tread on an expansive path where no divisions matter. There is no need here for verbal language, or any other aspect of culture, for the goal is to aspire for complete neutrality that is beyond all of these constructs. ganeshe.narayanan@yahoo.com

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The Indian EXPRESS

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IN 1932

BECAUSE THE TRUTH
INVOLVES US ALL

Uncertainties over US deal & India's challenge

THE IMPLICATIONS of the US Supreme Court's ruling that struck down President Donald Trump's policy of reciprocal tariffs are unfolding across the world. A few days ago, Malaysia's investment and trade industry minister Johari Abdul Ghani is reported to have said that the deal between the two countries was "null and void" following the US court's decision. Earlier, in the absence of any clarity on the tariff structure, the European Union had stopped working towards ratifying its trade deal with the US. This points towards a possible rethink among countries over recent trade agreements struck with the Trump administration.

In February, India agreed to a framework for an interim agreement with the US — the framework will be signed only after "Washington puts in place a new tariff architecture which safeguards India's comparative advantage in the US market", a senior government official told this paper. Under the interim agreement, the US would impose a reciprocal tariff of 18 per cent on India's exports. While that tariff rate had meant that India was placed favourably compared to some of its competitors, post the US court ruling, India's comparative advantage is being eroded. India has used Section 122 of the 1974 Trade Act to impose a uniform tariff rate of 10 per cent on goods imported in the US. This means that the concessions make little sense without reciprocity. Moreover, the 10 per cent tariff is for a 150-day period, which ends in July. There is little clarity on what happens after that.

Other challenges have arisen. A few days ago, the US Trade Representative launched an investigation under Section 301 of the Trade Act of 1974 for India and several other countries, citing "structural excess capacity and production in certain manufacturing sectors". Reportedly, the fast-tracked nature of the investigation could lead to new tariffs in place from May. The Tax Foundation, a US-based think tank, also says that these "investigations could pave the way to re-impose the now unlawful IEEPA tariffs". This suggests that a return to the era of low tariffs and a stable trading regime appears unlikely. In this unpredictable environment, India must use the space available to it to negotiate for greater market access. Its approach must be guided by the objective of seeking predictable, transparent and stable trade relations.

When justice becomes mechanical

IN FEBRUARY, while overturning a bail order to the accused by the Allahabad High Court in a dowry-death case, the Supreme Court had flagged its glaring inadequacy, citing the order by the single-judge bench of Justice Pankaj Bhatia as "most shocking and disappointing". Now, an investigation by this newspaper has revealed that in three months, in 508 of \$10 publicly available orders in dowry death cases passed by Justice Bhatia, bail was routinely granted, using similar logic, language and bond amount. The near-uniformity signals a troubling lack of application of mind by the court and a dilution of due process. In cases as intimate and often difficult to prove as dowry violence, reducing judicial scrutiny to a template risks turning adjudication into a mechanical exercise, divorced from the specific facts of each case.

Bail jurisprudence, anchored in the maxim "bail, not jail", demands a careful assessment of the severity of allegations. Especially in the case of dowry violence and death, Section 304B of the IPC (or Section 80 of the Bharatiya Nyaya Sanhita) creates a statutory presumption against the accused, treating the crime as heinous. Dowry-related violence tends to occur behind closed doors where evidence is sparse and witnesses vulnerable. But when judicial scrutiny seems to be brought to bear on these cases by rote, it threatens to leave women disproportionately exposed to systemic injustice. The Supreme Court has repeatedly stressed that high courts exercising powers under Section 439 CrPc (now Section 483 of the Bharatiya Nagarik Suraksha Sanhita, 2023) must engage in reasoned prima facie assessments that reflect in the structure and language of orders. In critical rulings such as State of Punjab v. Bal Singh (1994) and Shanti v. State of Haryana (1990), the apex court has expanded the understanding of dowry-related violence and strengthened the legal framework to meet its challenges. In the landmark State of Uttar Pradesh v. Ajmal Beg Et Al (2025), the SC reiterated that dowry-related violence goes against constitutional guarantees of Articles 14, 15 and 21, and that its eradication is "constitutionally imperative and necessary". These lessons to remember. If the adjudication of such crimes slips into mechanical repetition, it is not just legal standards that are eroded, but the promise of justice as well.

In Britain, Churchill out, badgers in

THERE IS something apt about the suggestion that a badger might displace Winston Churchill from Britain's banknotes. The Bank of England's proposed shift from historical figures to wildlife in their next series of banknotes has been hailed as a design refresh, a nod to biodiversity, a modernisation exercise against the threat of counterfeiting. Yet, it can also be read as a cultural recalibration. For decades, banknotes have elevated a series of eminent figures into a gallery of saints. But the selection has not been without criticism: Non-inclusion of racial or ethnic minorities, a conspicuous absence of women — Queen Elizabeth II and Jane Austen notwithstanding — have raised questions about the narrowness of the pantheon. What the presence of a king or a badger might force is a reckoning with all that is lost through a myopic engagement with history.

Historical figures have, in recent years, come under a more exacting gaze, their certainties eroded by scrutiny. Churchill remains a notable example. Racial attitudes and the broader ramifications of the Empire have complicated what was once a singular narrative of greatness. His government's role in the Bengal Famine of 1943, in which nearly three million people perished, has come under increasing criticism. Elsewhere, too, the afterlife of the Empire has become harder to ignore. A 2015 movement in South Africa led to the removal of the statue of British mining magnate and politician Cecil Rhodes from the University of Cape Town campus. These episodes highlight that history is dynamic, its study requiring continued accommodation of new evidence and long-suppressed voices.

Against this backdrop, wildlife offers the imagination to rest on a shared inheritance that is less contested and more capacious. Even the grandest narrative, after all, benefits from a little space to breathe.

During Nowruz, Iran's Persian culture collides with regime's ideology



RAJA MANDALA

BY C RAJA MOHAN

AS IRAN prepares to welcome the Persian New Year this week, an ancient festival has become the stage for a current political contest. On the eve of Chaharshanbe Suri — the fire festival that heralds Nowruz — Reza Pahlavi's call on the Iranian people to celebrate with vigour was as much a political intervention in a fraught moment as it was a cultural invocation. Pahlavi, the son of Mohammad Reza Shah, who was ousted by the Islamic Revolution of 1979, cast the flames of Chaharshanbe Suri as a force that could dispel the darkness of what he called an "un-Iranian" regime. For nationalist critics, the Islamic Republic marks a break from Iranian civilisation and culture.

Nowruz is best understood as a fusion between Diwali, Holi, and Ugadi (or Gudi Padwa, Vishu, Puthandu) — marking renewal, light, and the arrival of spring. Celebrated on the vernal equinox, Nowruz predates Islam by centuries and reflects the Zoroastrian worldview of ancient Persia, where fire symbolised truth, purity, and cosmic order. Chaharshanbe Suri, observed on the last Wednesday before Nowruz, is its most evocative prelude. Across Iran, people light bonfires in courtyards and streets, jumping over them in the belief that the fire absorbs sickness and misfortune and returns

vitality. Like Holi, it is exuberant and playful; like Diwali, it invokes light against darkness.

The Islamic Republic was never at ease with Nowruz. The 1979 revolution, like the Taliban's later project in Afghanistan, sought to subordinate inherited cultural traditions to a universalist Islamic ideology. Ayatollah Ruhollah Khomeini dismissed pre-Islamic practices as relics of "fire-worshipping", and the early years of the revolution saw attempts to curtail Nowruz, including the abolition of its customary holiday period. These moves provoked resistance, forcing the regime into a more gradual strategy — restricting public celebrations, discouraging participation, and reinterpreting festivals within acceptable ideological frames.

Chaharshanbe Suri drew particular hostility. A fatwa against it, administrative curbs, and attempts to rename it in neutral terms all reflected the regime's discomfort with a ritual it could neither control nor erase. Yet, like many ancient festivals in India that have survived waves of political and religious contestation, Nowruz endured. Over time, it has acquired a sharper political edge. For many Iranians — especially those born after the revolution — the act of celebrating Nowruz has become an assertion of continuity from the state's ideological project. From the flames of Chaharshanbe Suri now carry not just the symbolism of renewal, but also political defiance.

This year, Nowruz comes amid great turbulence in Iran. The anti-regime protests that erupted three months ago marked one of the most serious challenges to the Islamic Republic since its founding. The scale of repression that followed was unprecedented even by the Islamic Republic's standards.

At the same time, sustained American and Israeli strikes and the decapitation of Iran's leadership have left the regime under extraordinary pressure. It is into this moment of vulnerability that Reza Pahlavi has inserted his appeal. His call for strikes and civil resistance, framed in the language of Persian civilisational revival, are part of a broader effort to position himself as the leader of a potential transition in Iran. The choice of Chaharshanbe Suri is deliberate. Festivals bring people into the streets; they offer both symbolic legitimacy and practical cover for collective action. By linking protest to ritual, Pahlavi seeks to turn cultural participation into political mobilisation.

Whether symbolism can overcome structural constraints, however, remains uncertain. Official warnings ahead of Nowruz have been explicit: Dissent will be treated not as protest but as insurrection. Nor is it easy for people to gather in public when American and Israeli bombs are raining down. Yet the deeper significance of the moment cannot be missed. Nearly five decades after the revolution, the contest between competing identities in Iran has sharpened. The Islamic Republic was founded, in part, on a rejection of nationalism and traditional culture. But in practice, the Iranian state has never escaped the gravitational pull of Persian identity. It has been compelled, repeatedly, to accommodate elements of national culture even as it seeks to subordinate them.

The Islamic Republic was founded in part on a rejection of nationalism and traditional culture. But in practice, the Iranian state has never escaped the gravitational pull of Persian identity

Even within the system, attempts have been made to leverage this civilisational heritage. Mahmoud Ahmadinejad, president from 2005 to 2013, sought to revive pre-Islamic symbols, invoking Cyrus the Great and presenting

ancient Iran as compatible with the Islamic Republic. This effort to transcend the Islamic Republic's ideology alarmed the clerical establishment. Supreme Leader Ali Khamenei pushed back, denouncing the so-called Iranian School and clerical endorsement of such symbolism. The episode underscored the regime's unease with any narrative that might privilege Persian identity over Islamic ideology.

This tension — between an ancient civilisational inheritance and a more recent ideological state — is not unfamiliar to the Subcontinent. In Pakistan's Punjab, the spring festival of Basant has survived periodic bans. In India, cultural diversity endures despite serious attempts at homogenisation from empowered quarters. The persistence of Nowruz in Iran reflects a similar dynamic: The resilience of inherited tradition against the pressures of transient political authority. For those advocating regime change, this tension offers a potential lever. The invocation of pre-Islamic identity aligns with broader efforts at regime change in Iran. But history counsels caution. Civilisational identities are powerful, but they are also layered and contested. Their political mobilisation rarely produces predictable outcomes, and the Islamic Republic retains significant institutional support. As Iranians gather around bonfires this week, Chaharshanbe Suri illuminates an important question: Will Iran's future be shaped more by its enduring civilisational heritage or by its republican ideology?

The writer is a contributing editor on international affairs for The Indian Express. He is also associated with Jindal Global University and the Council on Strategic and Defence Studies, Delhi

Epstein case is about the way power is structured



SANDHYA GOKHALE

SIMONE DE BEAUVOIR once wrote, "The world that men themselves have built, its representation too is done by them." This sentence is not just philosophical. It describes how power works. When we look at Jeffrey Epstein case through a feminist lens, this becomes painfully clear. The stories of women are rarely told in their own voices. They pass through systems controlled by powerful men. They are delayed, reshaped, doubted, or buried.

For many years, the crimes of Epstein remained hidden. This was possible because the structures of power around him protected him. Economic power, political influence, and legal authority were concentrated in the hands of men. The silence surrounding the case was the product of a system that protects its own.

The feminist movement of the 20th century fought to establish the basic rights of women. They insisted that women's lives and experiences were worthy of recognition. In the 21st century, feminist thought expanded further, showing that private suffering reflects larger social structures. Yet even today, when women are visible in education, professions, politics, and public life, their safety, dignity, and autonomy are uncertain. The Epstein case reveals this contradiction.

Epstein targeted girls aged between 10 and 14. Sexual relations with them are clearly criminal. Still, the exploitation continued for years. Victims came forward with evidence but the legal process moved slowly, and often not at all. Around Epstein stood a network of powerful men that functioned like a protective wall. This pattern reflects what feminist scholars call institutional impunity. The structure of Epstein's network reveals another important dimension: The feminisation of poverty. Many of the girls targeted came from economically fragile backgrounds. A payment of \$200 for a short "massage" could appear like an opportunity. Others were promised help with modelling careers or education. These promises created an illusion of choice. But feminist scholars have long argued that choice in conditions of deep inequality is not genuine freedom.

Another revealing aspect is how the system turned exploitation into something resembling a commercial transaction. Many victims were offered money in exchange for silence. Legal agreements prevented them

from speaking publicly. The network functioned through elite male solidarity. Powerful men often protect one another because the exposure of one can threaten the others. The media also plays a complicated role in such cases. Scandals often become sensational stories about one monstrous individual, which can distract from deeper structural questions. Another troubling element is the way responsibility is sometimes redirected. In the Epstein case, Ghislaine Maxwell received a severe sentence. Her role in recruitment was undeniable. Yet the powerful men who directly exploited underage girls have largely remained in the shadows.

At the same time, it is important to recognise the courage of survivors. Many women who were exploited eventually spoke publicly despite intimidation, shame, and long delays in justice. Their testimonies forced the world to look more closely at the truth.

The political climate also shapes these debates. In recent years, attempts have been made in some countries to weaken gender studies and feminist scholarship. When discussions of gender are reduced to biological differences, the social structures that produce inequality disappear from view. Feminist theory provides the intellectual tools to understand power, consent, and exploitation. Without these frameworks, systemic injustice can easily be dismissed as individual misfortune.

The Epstein case must be understood as a warning about how power operates. We must ask why the voices of victims are doubted, and how wealth and influence can distort justice. We must recognise that exploitation arises from systems that protect those who hold power. Only when these structures are challenged can justice move beyond symbolism and begin to transform reality.

Gokhale is a lawyer, writer and filmmaker



SUANSHU KHURANA

In 'Sinners', the blues bear the weight of Black history

IRYAN Coogler's supernatural musical *Sinners*, the meet comes from twin gangsters Smoke and Stack (both played by Michael B Jordan) and the pale blond-sucking vampires, who emerge as a metaphor for White supremacy. The real work of carrying the film's politics, however, is done by its music. The blues that rise stubbornly, wrapped in grief, gospel, wit, and even defiance.

The impressive score by Swedish composer Ludwig Göransson, who won his third Oscar, draws enormously from the musical vocabulary of the Mississippi Delta of the 1930s, the period in which the film is set, when the blues, with its slow bend of guitar strings and plaintive notes, wasn't just entertainment. The blues, in every twang and riff, bore the weight of the racial segregation imposed by the Jim Crow laws. Göransson travelled the "blues trail" with his father, a blues guitarist, and Coogler, immersing himself in the landscape and culture that shaped the genre.

The trail led further back, to centuries of the transatlantic slave trade. The little enslaved Africans brought along included their musical traditions. The songs, steeped in African traditions, came from the Deep South's cotton fields and rail yards — where they originated as work songs, call-and-response patterns, sometimes hollers to alert other workers of the farm owners' arrival, or just expressing longing and pain — evolving into what we now recognise as the blues. The music travelled with the Great Migration in the mid-20th century, when millions of Black people seeking opportunities and escape from discrimination migrated to the northern and midwestern states. The blues got sharper, even becoming a masked commentary on everything African-American life through.

Coogler taps into that tradition, presenting the blues as a living, breathing example of Black survival. When the blues were performed at juke joints — dimly lit wooden shacks, seen in the film — freedom was briefly felt. In the stomps of the feet, singing and dancing, one could dull the weight of the unkind world outside. And these are what became the beating heart of the blues. The blues, the music that went on to shape everything from jazz and rock 'n' roll to contemporary pop. But the original artists would be erased from the narrative as record labels got White artists to cover "race music", embracing the sound but sanitising it. The vampires sing the "whitewashed" versions in the film. The song also presents centuries of Black musical history in a single sequence: African drummers, a Hendrix blues guitarist, and a DJ connect musically in the same space, manifesting an unbroken string of melodies that bind them all. This sequence acquires a different significance with concerns about the erasure of the Black past as the Donald Trump administration seeks to rewrite history books.

The film tells us that the songs, if powerful enough, can summon the spirits, weaving in the myth of blues legend Robert Johnson, who supposedly sold his soul to the "devil" for super-natural musical powers. *Sinners*, too, is a haunting connection between past and present. It tells us that, even if erased, the blues will summon the brutal history of Black people. If called out to, the past will, almost every time, answer across time.

The writer is senior assistant editor, The Indian Express. suanshu.khurana@expressindia.com

40 YEARS AGO

March 18, 1986



Sobhraj used methaqualone

THE SUBSTANCE used by Charles Sobhraj to drug the jail guards so his escape from Thirajail has been identified as methaqualone. This is used in the drug Mandrax, according to doctors who treated the guards. The drug, taken in slow doses, at first induces a sense of well-being, but soon induces unconsciousness. Doctors believe the drug was contained in the petha the jail staff had eaten.

Doordarshan hauled up

THE INFORMATION and Broadcasting Min-

ister, V N Gadgil, asked the Doordarshan authorities to report to him why there was no mention of Charles Sobhraj's jail-break in the Hindi or English news bulletins.

Clashes in Jalandhar

THE ENTIRE old city of Jalandhar was placed under curfew following group clashes while the bandh call given by the Shiv Sena evoked a mixed response. A doth merchant was shot dead near Niazpur village in Hoshiarpur district. Hindu Shiv Sena activists opened fire at a house in the curfew-bound Batala town.

Massive hunt for Sobhraj

THE DELHI Police has apparently made little progress so far in tracing Charles Sobhraj and his twin brother, who escaped along with him from Thirajail after drugging seven members of the staff. Interpol has been alerted. In the absence of any official statement from the seven persons who were drugged, the police said it was difficult to make concrete headway. The police, however, strongly suspect that the seven, including Sobhraj, might not have escaped from the country, and for all one knows, not even from the national capital.



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India's GDP debate: Right questions, wrong numbers



V ANANTHA NAGESWARAN AND SAURABH GARG

HOW ACCURATELY does India's GDP capture what is happening in the economy? It is a question serious economists have been wrestling with for some years. The February 27 revision to the national accounts methodology — developed through what even the authors of a recent paper on the issue describe as “commendable consultations” — is the most substantive effort to improve GDP estimation, addressing deflator choices, the treatment of the informal sector, and the use of administrative data. Into this conversation steps a working paper by Abhishek Anand, Josh Feldman, and Arvind Subramanian, published by the Peterson Institute in March 2026, claiming to provide “new evidence” of systematic misestimation.

The paper's two core methodological complaints — that India uses WPI-based deflators tracking commodity and oil prices rather than prices of actual production, and that it used formal-sector corporate data as a proxy for informal-sector activity — are not new. They have been in the academic literature since at least 2016, including in Subramanian's own earlier work. These choices were driven by structural data limitations rather than analytical oversight. In the absence of regular annual data on informal-sector output and a comprehensive Producer Price Index, the use of WPI-based deflators and formal-sector corporate data was pragmatic and arguably the most viable option available.

The paper's assertion that the WPI is an inappropriate deflator and the CPI a better alternative is also misplaced. India's WPI is conceptually close to a Producer Price Index, which is what international organisations prescribe. The CPI reflects price movements relevant to private consumption; goods and services such as steel, cement, minerals, chemicals, IT services, trade, and professional services are produced primarily for industrial use and rarely appear in the CPI

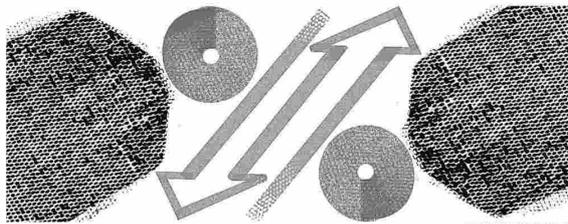


ILLUSTRATION: C R SASIKUMAR

basket. Real estimates for many services also derive from a much broader set of volume indicators than the paper considers.

With annual data from the unincorporated sector survey and labour force surveys now available, the base-year revision to 2022-23 addressed several of these issues. The February 2026 methodology revision — described by the authors as resulting from commendable consultations — was in any case announced before this paper appeared. The informal-sector corrections are shakier still. The paper uses unincorporated enterprise survey data covering only half the informal economy — construction is excluded — and applies the performance of surveyed sectors to the entire informal economy to construct its “lower bound” estimates. That phrase, lower bound, is doing a lot of work. The survey data also exclude housing services, which account for a substantial share of informal-sector GVA in the national accounts. Using raw survey figures without accounting for this omission structurally understates informal-sector performance and overstates the formal-informal divergence that sits at the heart of the misestimation argument.

Moreover, the paper's use of inter-survey growth rates to infer divergence from official GVA growth overlooks the fact that India's National Accounts rely solely on GVA per worker from the unincorporated sector survey. There is also a circularity problem. The paper uses corporate sales data as its primary benchmark to demonstrate GDP misestimation, which assumes corporate sales are the correct benchmark — precisely what is at issue. Worse, corporate sales

If the true overestimation were really 22 per cent of GDP, the official revision would look nothing like it does. That gap is not a detail to be explained away

measure turnover rather than value added. Changes in input cost structures and productivity can drive large wedges between sales growth and GVA growth that have nothing to do with measurement error.

The authors also argue that using MCA data may lead to overestimation. But the MCA database provides comprehensive coverage based on actual reported data, not survey-derived estimates like the ASI; corrections relying solely on ASI data for organised manufacturing are therefore unacceptable. More fundamentally, the paper never confronts the fact that India's economy changed substantially after 2015: Rapid expansion of the digital economy, strong growth in financial services and insurance, the emergence of India as a major hub for Global Capability Centres, and deliberate policy-driven formalisation. These are precisely the activities that do not show up in energy consumption, trade volumes, or bank credit data — the very indicators the paper treats as reliable proxies for aggregate output.

Some weakening of correlation with the selected variables is therefore not unexpected, given the significant changes in indicator relevance over time. The use of direct tax growth ignores major tax policy rationalisation, most notably the corporate tax rate reduction introduced in 2019. The Index of Industrial Production does not adequately capture structural changes in India's manufacturing sector since 2011-12. And bank credit overlooks the growing role of alternative financing sources in supporting investment and consumption.

But the most damaging issue is

one the paper never addresses. Subramanian, as India's Chief Economic Adviser, was the principal author of the Economic Survey of India 2017-18, Chapter 2 of that Survey, using early GST data, found that purely informal firms — outside both GST and social security coverage — accounted for only about 7 per cent of total economic turnover, even though they represented 87 per cent of firms by number. Firms within the GST net accounted for nearly 80 per cent of total turnover. The Survey documented rapid, self-reinforcing formalisation, as small firms registered voluntarily to access input tax credits from larger buyers.

The 2026 paper's misestimation argument rests on the claim that the informal sector accounts for roughly 44 per cent of GVA and that formal and informal sectors diverged so sharply after 2015 that using formal data as a proxy led to sustained overestimation. Both claims are substantially weakened by what the 2017-18 Survey found. If 80 per cent of turnover was already in the formal economy by late 2017, and formalisation was accelerating, the informal sector's weight would have shrunk further still in the years that followed. The paper makes no attempt to reconcile its baseline assumption with the evidence its own author produced. The omission is not peripheral: The informal sector misestimation component accounts for between 0.4 and 0.8 percentage points of the paper's estimated annual overestimation. Weaken it, and the quantitative edifice wobbles considerably.

The strongest empirical check on the paper's claims is the official February 2026 revision itself. The authors describe the consultation process behind it as commendable. The revision, produced by statisticians working with full access to administrative data and without the methodological shortcuts the paper employs, produced a substantially more modest adjustment than the paper's estimates imply. If the true overestimation were really 22 per cent of GDP, the official revision would look nothing like it does. That gap between the paper's claims and the official outcome is not a detail to be explained away. Knowing where to stop is part of the discipline of empirical work. This paper does not stop at the right place.

Nageswaran and Garg are the Chief Economic Adviser to Government of India and Secretary, MoSPI, respectively. Views are personal

Oil shock redux: We've been here before



ISHAN BAKSHI

IN 1979, the Iranian revolution triggered a global oil shock. As the country's oil production declined — according to some estimates, by 7 per cent of world output — the price of oil soared from \$13 per barrel in mid-1979 to \$34 per barrel by the 1980s. The price shock was felt the world over, and India was no exception. India was then struggling to emerge from what has been described as probably the worst 15-year stretch for its economy. The decade and a half from 1962 to 1977 had seen three wars, droughts, a sharp pivot towards socialism, an oil shock in 1973-74 and a national emergency. The oil shock in 1979-80 pushed up inflation, worsened the country's balance of payments and exerted pressure on foreign exchange reserves.

Fast forward to the present. The current conflict in the Middle East, which has sent oil prices soaring, has also come after several shocks to the Indian economy over the past decade and a half. From the taper tantrum of 2013 to demonetisation in 2016, the Covid pandemic in 2020-21 and the Russia-Ukraine conflict in 2022 — these back-to-back shocks have been inflationary and have exerted pressure on the rupee and the twin deficits and impacted the country's growth momentum.

India, again, is no exception. No matter what their point of origin, the reverberations of these crises — the most recent ones have caused severe dislocations in real economic activity which have then spilled over to financial markets — have been felt the world over, having not only economic but political consequences as well. In 2022, the surge in energy prices had contributed, in part, to the fall of the Imran Khan government in Pakistan. If the ongoing conflict in the Middle East continues — it is of a much higher order of magnitude — the damage to countries could be far greater. Even the proposed release of 400 million barrels of oil

by the IEA members — equivalent to roughly 20 days of oil that flows through the Strait of Hormuz — has not been enough to calm the markets. Perhaps because the market believes that the conflict will last longer than that.

However, when compared to 1979, the Indian economy is in considerably bigger and has a greater capacity to absorb shocks. Some of the constraints that existed in the past and complicated economic management — food, forex and domestic savings — are either less of a constraint

now, or no longer exist. But the energy constraint — India imports 85 per cent of its crude oil requirement, 50 per cent of its natural gas needs and over 60 per cent of its LPG demand — is unlikely to disappear anytime soon, making it particularly vulnerable, despite the steady expansion in alternate energy capacity.

While some estimate that the price shock now, when adjusted for inflation, is lower than that during the Iranian Revolution in 1979 or during July 2008. If the energy market disruptions sustain, they can exert pressure on India through many channels, some of which are already evident. Economic activities will be disrupted — restaurants and hotels are already feeling the pain, as per a survey report. Rationing of food will follow, impacting households and firms — a black market for LPG cylinders is already said to have emerged. Inflation will rise — price pressures are reportedly being felt across several commodities. The rupee will come under pressure — money is already flowing to the US dollar. And so will the twin deficits — the fiscal will possibly take a hit as governments try to cushion the blow owing to political compulsions, while a widening current account deficit at a time when capital inflows were slumped will make macroeconomic management challenging. History is likely to repeat itself, even imperfectly.

With the pain now being felt, though not in equal measure, by the sellers of energy — Iran and the Gulf countries — and the buyers, India is not alone, European consumers will feel the pain as will Americans — the calculus of the conflict should change. A prolonged war will soon become politically unpalatable as the thresholds of pain are breached. In the US, the cost of gasoline has now crossed \$3.5 per gallon, up around 60 cents from a month ago. Donald Trump is unlikely to want the midterm elections to be held in the shadow of a stock market in the red and oil above \$100. Domestic political compulsions will, hopefully, prevail.

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LETTERS TO THE EDITOR

GDP Data

ABHISHEK ANAND, Joshua Feldman and Arvind Subramanian state, quite rightly, that India's GDP estimation needs further improvement, with a focus on coverage and deflators used, so that greater confidence may be reposed in them (“How GDP data misread the economy, complicated policy”, IE, March 13). But their claim that the existing data implies an unchanging GDP growth for over almost three decades is an artefact of their practice of averaging growth rates for selected intervals of unequal length. When continuous data of an annual frequency are considered, it will be seen that the time series is non-stationary with every one of the features/shocks they highlight, namely the high growth phase in the first decade of the century, the global financial crisis, demonetisation, GST implementation, the IL&FS crisis and Covid. The authors miss the “dizzying dynamism” of the early part of the century as they distribute the data for the period 2003-08 between separate buckets.

Padmapre Balakrishnan and M Parameswaran, Thiruvananthapuram

Assembly elections

THESE ELECTIONS across five diverse regions will act as a barometer for governance and regional dynamics (“Four state arenas & poll dust that will spill over”, IE, March 17). The EC's decision to compress the West Bengal schedule into two phases serves as a corrective, yet it coincides with heightened institutional friction. When electoral processes, such as the SIR lead to litigation and impeachment motions, the focus shifts from policy to the neutrality of democratic machinery. But true success lies in conducting a process that reinforces institutional credibility. It is essential that the democratic exercise remain a stable platform for public sentiment, free from institutional confrontation.

Anantha Padmanabhan, Bengaluru



SHIREEN VAKIL

IN 2017, a 14-year-old girl in the United Kingdom took her life after being exposed to a stream of harmful online content. Like most teenagers, she used social media regularly. After a legal battle, a coroner concluded that the content she encountered online had contributed directly to her death. The case became a catalyst for the UK government to strengthen its laws regulating digital platforms. Sadly, the tragedy was not unique.

Globally, evidence has been mounting that excessive use of social media is harming children's mental health. Research across several countries shows that heavy social media use is linked to a two- to three-fold higher risk of suicidal ideation and self-harm among adolescents. In *The Anxious Generation*, Jonathan Haidt traces the sharp decline in youth mental health to the rise of smartphone-based childhood. Between 2010 and 2020, rates of depression among teenagers rose sharply, including a reported 145 per cent increase among girls and 150 per cent among boys in some datasets.

Against this backdrop, governments are reconsidering how young people access social media. In December 2025, Australia passed legislation raising the minimum age for social media use from 13 to 16. Critics often describe such measures as a “ban”, but that framing misses the point. The aim is not to “ban” young users, but to protect them from the harmful effects. Raising the age limit will not solve

Parents, companies must act against social media harms

every problem, but it may be a sensible place to begin. Social pressure often drives children to join platforms. When most of a child's peers are online, parents feel compelled to allow access even if they have reservations. A higher age threshold could help reset expectations and reduce pressure on families who want to delay the exposure.

The current minimum age of 13, after all, was never based on research about adolescent development. It originates from the US's 1998 Children's Online Privacy Protection Act, which set 13 as the age at which companies could collect children's data without parental consent. At the time, social media platforms did not exist. Nearly three decades later, the same age threshold exists. Meanwhile, digital technologies have evolved dramatically. Social media platforms rely heavily on engagement-driven design: Algorithms, endless scrolling, and constant notifications, all intended to keep users online as long as possible. Children are particularly vulnerable because their brains are still developing. The prefrontal cortex, responsible for impulse control, judgement and long-term decision-making, is not yet fully developed. Teenagers are, therefore, less equipped to resist persuasive design features or critically evaluate what they encounter online.

Adolescence is also a time when social validation becomes impor-

tant. A study across 26 districts in India found that nearly half of adolescents reported feeling distressed when their posts did not receive enough “likes”. There are also serious safety risks. Technology-facilitated child sexual exploitation is expanding worldwide, affecting 300 million children. The Annual Status of Education Report 2024 found that nearly 90 per cent of adolescents aged 14-16 have access to a smartphone at home, and social media remains a dominant activity. Despite evidence of harm, safety-by-design remains the exception, not the norm. Platforms often introduce safeguards only after problems emerge rather than incorporating protections from the start. This reactive approach places an unreasonable burden on parents and parents to manage the risks embedded in the platform design.

Parents certainly have a role to play, but companies that profit from these platforms must also be held accountable. Raising the minimum age for social media access to 16 should be seen as one step in a broader effort to protect young users. Governments must ensure platform accountability, push for stronger safety-by-design standards and greater transparency around algorithms and platform practices. It may even encourage companies to design truly age-appropriate technology, allowing children to benefit from technology rather than be harmed by it.

The writer, a child protection and digital safety expert, was head of safety policy at Meta



AKSHAY SAXENA

OVER THE PAST weeks, the newspapers celebrated the success of top-rankers of the JEE (Main). They will go on, deservedly, to India's top colleges and alter the trajectory of their families. Hidden within this success is a massive cost — to the self-worth, learning behaviours and life outcomes of the over 1 million students who did not clear the test.

The majority of these students spend lakhs of rupees over multiple years on coaching classes. Along the way, they learn that

their success depended almost entirely on their intelligence and hard work. Even those that did clear the exam enter college with the same damaging belief — that their ability is fixed and these outcomes define their worth.

The prevailing dogma is that the path to success is to submit to a high-pressure preparation programme. Research suggests this couldn't be further from the truth. A paper by Carol Dweck, Greg Walton and Geoffrey Cohen argues that academic tenacity rests on psychological pillars — beliefs about whether intelligence can grow, a sense of purpose, social belonging, and self-regulation. These are shaped by environments where high standards are paired with an

achievable path, scaffolding, and care.

Most classrooms, especially coaching classes, emphasise exactly the opposite. Consider just one component: Growth mindset. The typical JEE candidate spends two years being categorised — batch A, B, C, D — absorbing the message: Your “rank” is your identity. Growth mindset thrives when teachers set high but achievable standards,

Too many students live inside ‘IIT or bust’ cultures — years of high stakes, high spend, and low psychological safety

and when students can see a credible path from where they are to where they need to be. Instead, too many students live inside “IIT or bust” cultures — years of high stakes, high spend, and low psychological safety. Students need scaffolding through mentorship that helps them interpret setbacks productively. Yet, most receive the opposite: Reprimands, shaming and punishment tasks. Adolescents seek and need a sense of belonging. When you're moved to a “lower” batch for one bad test and assigned a new rank each week, this becomes incredibly hard. If this is all true, why are coaching classes so successful? Are they? The success rates of coaching institutes are the same as

the national averages. What leads to this perception is the full-page ads of JEE top rankers. None of what I have written applies to toppers who receive constant support.

Creating a culture of care is not the same as setting low standards. It is also not telling everyone (falsely) that they can succeed. It is one of excellence by supporting young people in making (sometimes slow) thoughtful progress. We need to start holding institutions accountable not just for the rank they helped students secure but also for the process they followed to get them there.

The writer is co-founder and co-CEO of Avanti Fellows

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If there are questions of current or contemporary relevance that you would like explained, please write to explained@indianexpress.com

• GLOBAL

China's ethnic unity law shows little tolerance for diversity

Rishika Singh
New Delhi, March 17

CHINA'S TOP legislative body last week adopted a law for securing "unity and harmony" among the country's ethnic groups, presenting the state's view of its cultural diversity.

What does the law say?

According to a translation from China Law Translate, a community project affiliated with the Yale Law School, its preamble mentions shared identity and unity. It speaks of a struggle of "jointly resisting foreign aggression," referencing colonial rule in the 19th century, and recognises the Communist Party as "the vanguard" of the people. China Law Translate told *The Indian Express* over email: "The main thrust of the law is integration, emphasising that while ethnicities have their own valuable traditions and languages, there must be a common sense of identity as 'Chinese People' and building this conception requires some assimilation." While integration generally means diverse parts coming together, assimilation sees groups mirroring the practices of the dominant group to blend in.

Some key provisions are:

• **Article 10:** "Matters of ethnic unity and progress are not to be interfered with by foreign forces... using excuses such as ethnicity, religion, or human rights." This is likely referencing global criticisms for human rights violations in the autonomous regions of Xinjiang and Tibet.

• **Article 15:** "Schools and other educational institutions are to use the nation's common language and script as the basic language..." China Law Translate said this meant emphasised Mandarin, even in cases where minority languages are used.

UNITY AS ASSIMILATION

• The establishment of a Communist state in 1949 saw it extend control over frontier regions of Xinjiang and Tibet.

• Religious displays have been restricted under the "Sinicisation" of religion, to be subsided under the Han Chinese culture.

UNITY AS ASSIMILATION

• Officially, China recognises 56 ethnic groups, including the Hans, the Uyghurs, the Tibetans, and the Mongols. Today, the Han Chinese constitute over 90% of the population and are the largest group in Taiwan.

Former Indian Foreign Secretary Shyam Saran, in his book *How China Sees India and the World*, wrote, "The main challenge faced by successive Chinese empires was the perennial attacks by fierce nomadic tribes ranging across its northern and western peripheries... In some cases, these tribes themselves became Sinicised and, in turn, assumed the attitudes and mores of the heartland Chinese. The homogeneity of the latter-day Chinese is more a cultural rather than ethnic homogeneity, reinforced by shared attitudes and a unified script."

In modern China, non-Han cultural displays have been viewed as at odds with Communist ideas, and, as analysts have argued, competing with the party in terms of authority. The state has increasingly focused on the Uyghur Muslims from a security perspective. The recent carrot and stick approach in frontier areas has included mass surveillance, purishments and large infrastructure projects to boost job creation. Coming alongside a gradual in-migration of Han people, this is feared to fuel resentment among the locals.

Why has the law come about now?

The law is a continuation of ideas propagated under Chinese President Xi Jinping. For instance, it frames "ethnicity" as part of the goal of "revitalisation" of the Chinese nation after what is perceived as years of suppression under foreign rule. Xi has emphasised it repeatedly.

Part of achieving this goal is solidifying China's territorial claims over Hong Kong, which enjoys some independence under the "One Country, Two Systems" scheme, and Taiwan, an island that functions independently. China has increasingly displayed its military might around the island, and Xi undertook rare visits to Tibet and Xinjiang last year.

• WAR IN WEST ASIA

Iran war's economic fallout may be worse than Ukraine



HARISH DAMODARAN

ON FEBRUARY 24, 2022, when Russia began its war on Ukraine, the international prices of all three F&S—fuel, food and fertilisers—skyrocketed.

Brent crude prices soared to above \$100 per barrel and stayed at those levels till early August, with a peak monthly average of \$117.9 in June 2022. The United Nations Food and Agriculture Organisation's (FAO) food price index—having a base period value of 100 for 2014-16—averaged 144.5 points in 2022 and scaled an all-time high of 160.2 points in March. Landed prices of imported di-ammonium phosphate (DAP) and muriate of potash fertilisers in India crossed \$950 and \$590 per tonne by July 2022, while that of intermediates and raw materials like phosphoric acid, ammonia and rock phosphate hit \$1.75, \$1.575 and \$300-plus per tonne respectively during that year.

The impact then

The Russia-Ukraine war's impact was felt mainly on the merchandise trade account of India's external Balance of Payments (BoP). The trade deficit—the excess of imports over exports of goods—soared from \$102.2 billion in 2020-21 (April-March financial year) to \$189.5 billion in 2021-22 and \$265.3 billion in 2022-23.

The BoP's other components, however, were affected. The widening of the merchandise trade deficit was considerably offset by an increased surplus on the so-called invisibles account. The latter pertains to the global flows of services, people, data and ideas, as opposed to the "visible" trade in goods across national borders.

The accompanying table shows that India's net invisibles surplus went from \$126.1 billion in 2020-21 to \$150.7 billion in 2021-22 and \$198.2 billion in 2022-23.

This was largely courtesy of two items, software exports and private remittance transfers by Indian living and working abroad. The two together constituted over 55% of the gross invisibles receipts of \$465.8 billion in 2022-23 that, for the first time, even exceeded India's exports of goods valued at \$456.1 billion.

The higher invisibles surplus resulted in

• Key components of India's Balance of Payments (ALL FIGURES IN \$ BILLION)

	2020-21	2021-22	2022-23	2023-24	2024-25	Apr-Dec 2025
1. TRADE BALANCE	-102.15	-189.46	-265.29	-244.91	-286.95	-251.62
a. Exports	296.3	429.16	456.07	441.44	442.08	333.37
b. Imports	398.45	618.62	721.36	686.35	729.03	584.99
2. NET INVISIBLES	126.06	150.69	198.24	218.8	263.89	221.38
a. Remittances	80.19	89.13	112.47	118.71	135.43	110.88
b. Software	100	122.09	146.77	160.33	180.63	150.35
3. C.A.B.*	23.91	-38.77	-67.05	-26.11	-23.06	-30.24
4. CAPITAL FLOWS	63.37	86.27	57.92	89.81	18.03	-0.58

*CURRENT ACCOUNT BALANCE; BOTH REMITTANCES (PRIVATE TRANSFER) AND EXPORTS OF SOFTWARE SERVICES ARE IN GROSS TERMS; CAPITAL FLOWS INCLUDES ERRORS & OMISSIONS. SOURCE: RESERVE BANK OF INDIA.



the country's overall current account transactions deficit being contained at just above \$67 billion. India, moreover, attracted capital inflows—basically foreign investment and external commercial borrowings—to the tune of \$579 billion in 2022-23, further softening the blow from the war.

In 2023-24, as global prices of the 3Fs eased, not only did India's merchandise trade deficit fall to \$244.9 billion. It was accompanied by a still higher invisibles surplus of \$218.8 billion, thereby shrinking the current account deficit to \$26.1 billion.

The latter, at \$89.8 billion in net terms, was the highest since the \$92.3 billion, \$92 billion and \$107.9 billion of 2017-18, 2012-13 and 2007-08 respectively.

The situation now

In the US-Israel war against Iran, it is fuel, out of the 3Fs, that has borne the brunt of price surge.

Iran's effective closure of the Strait of Hormuz—the narrow maritime waterway

through which a fifth of the world's total petroleum liquids consumption equivalent and liquefied natural gas (LNG) trade passes—propelled Brent crude prices past the \$100 per barrel-mark this month.

The effect on fertilisers has been less, at least for India. The country's comfortable stocks of urea, DAP and compound fertilisers, besides the next kharif (monsoon) crop planting season being 2.5-3 months away, means no immediate crisis. But with more than 60% of India's imports of LNG (the basic feedstock for urea) and 80% of inputs such as sulphur and ammonia coming from West Asia, a prolonged war can have serious implications for India's agriculture and food security.

As for the third F, the FAO's food price index averaged 125.3 points in February 2026—down from 126.6 points in February 2025 and way below the 2022 peak following the outbreak of the Russia-Ukraine war.

India has also entered the present war with government stocks of rice and wheat at 99.7 million tonnes (mt) on February 1, an all-

The world has largely adjusted to the Russia-Ukraine war. But the West Asian conflict's ramifications for India will extend beyond oil

time-high for this date and as against 83.8 mt a year ago. This wasn't the case in 2022, when India harvested a poor wheat crop—due to sudden temperature spike in March just as the stage of grain-filling—on top of the supply disruptions from Russia-Ukraine.

Compared with then, the situation in food is better, more so as India is set for a bumper harvest of wheat, mustard, chickpea and other rabi (winter-spring) crops. Globally, too, the US Department of Agriculture has projected record production of wheat, rice, corn (maize), sorghum, soyabean, rapeseed and palm oil for 2025-26.

Like with fertilisers, the problems in food would arise only if the war stretches to the point where farmers struggle to access sufficient nutrients for their ensuing crops.

The real vulnerability for India

The Russia-Ukraine war's damage to India, as earlier noted, was primarily on the merchandise trade account of the BoP. The West Asia conflict's ramifications could extend beyond that, to even the invisibles account.

This war is being fought far closer home. According to the Ministry of External Affairs, there are nearly 8.9 million overseas Indians in the Gulf Cooperation Council countries alone: Bahrain (3.28 lakh), Kuwait (9.96 lakh), Oman (6.87 lakh), Qatar (8.37 lakh), Saudi Arabia (24.64 lakh) and UAE (35.69 lakh). Reserve Bank of India data shows that these six countries have a combined 37% share in the gross remittances of \$187 billion received by India in 2023-24.

If the war drags on, pushing the West Asian economies into contraction and forcing large-scale return of Indian workers, it would significantly dent India's invisibles account surpluses. That would, in turn, cause a ballooning of the current account deficit. And all this comes amid a slowdown in capital flows, which was already putting pressure on the rupee.

It can be seen from the table that net capital inflows to India plunged from \$89.8 billion in 2023-24 to \$18 million in 2024-25, and turning negative for the first nine months of this fiscal. The drying up of capital flows is also borne out by foreign portfolio investors making net sales of \$18.9 billion in Indian equity markets last year and another \$9.4 billion so far in 2026.

The world, and India, have adjusted to the Russia-Ukraine conflict that continues to rage for four years and counting. Neither can afford the consequences of a similarly lengthy war in West Asia.

How the global energy shock threatens India's Goldilocks era

Siddharth Upasani
New Delhi, March 17

INDIA HAS always been dependent on the world's energy producers on account of it having to import a vast majority of its fuel needs. But the last half-a-decade, starting with Russia's invasion of Ukraine and the US and Israel's attacks on Iran and the subsequent closure of the Strait of Hormuz, has shown just how vulnerable the economy is.

The impact is already visible on the rupee, which has had to contend with weak foreign direct investment and portfolio outflows over the last one year. The Indian currency, which fell below 90- and 91-per-dollar in December, breached 92 earlier this month and ended at 92.38 on Tuesday, hovering close to its all-time low of 92.48. If crude oil prices remain elevated, even 100-per-dollar may not be far away.

According to a scenario analysis by QuantEco Research's economists, while the potential hit will be "miniscule" if oil averages around \$80 per barrel in 2026-27 (up from \$70 per barrel in 2025-26), the impact could become "non-linear and broad based" at higher levels: at \$100/barrel in 2026-27, the rupee could weaken to as much as 98.5-per-dollar, they found.

The Indian economy has posted impressive growth rates recently, both under the old and new GDP series, clocking in at 7.8% in the final three months of 2025. Inflation, too, has settled comfortably below the Reserve Bank of India's (RBI) 4% target, with inflation as per the updated Consumer Price Index (CPI) at 3.2% in February. However, this positive growth-inflation mix is now under threat.

"The Goldilocks narrative of strong growth and low inflation persists under the new GDP and CPI series, but is challenged by higher crude oil prices and fuel shortages," Nomura economists said last week.

Shock to growth, inflation

After retreating from \$100/barrel-plus levels, global crude oil prices remain highly volatile and elevated, with the average price of India's crude oil basket set for March at \$108.23/bbl, up 5.7% from February. And while the US has granted India a 30-day waiver to buy Russian oil stock at sea, this isn't seen as a "game changer" by Nomura.

Meanwhile, the gas shortage has already forced the government to prioritise certain sectors and hike the price of household cooking gas by Rs 60 per cylinder, among other measures. The cooking gas

• What happens if crude price spikes?

A higher average crude oil price in 2026-27 will hurt growth, raise inflation, weaken the rupee, and widen the CAD

	FY26	FY27 pre-war	FY27 post-war		
Crude oil price assumption (\$/bbl)	70	70	80	90	100
GDP growth	7.6%	6.6-6.8%	6.5-6.7%	6.4-6.6%	6.2-6.2%
CPI inflation	2.1%	4.0%	4.2%	4.6%	5.1%
Current account balance (% of GDP)	-1.1%	-1.2%	-1.6%	-1.9%	-2.2%
Rupee's exchange rate (per US\$)	91.5	93.0	95.5	97.0	98.5

Note: FY27 post-war figures are statistical scenarios, not QuantEco Research forecasts; oil price assumption is FY27 average; \$B refers to barrel. Source: QuantEco Research

price hike by itself may push up inflation in March by 12-13 basis points (bps), according to Barclays; Nomura has already raised its forecast for average CPI inflation in 2026-27 by 70 bps to 4.5%.

The growth story is similar, with the RBI's projections pegging GDP growth (as per the old series) at 6.9-7% in the first two quarters of 2026-27, with risks "evenly balanced". Economists at ICICI Securities Primary

Dealership, however, have cut their forecast for next year by 50 bps to around 7% even if the acute supply disruptions are "largely resolved in a month". And if the conflict drags on longer and movement of energy via the Strait of Hormuz remains problematic, the resultant hit to global growth would be an additional headwind for India.

Footnote the bill

Some costs due to the West Asia war are already piling up, with the finance ministry having sought Parliamentary approval to spend about Rs 19,230 crore on fertiliser subsidy in 2025-26 itself. An Economic Stabilization Fund, with a corpus of Rs 1 lakh crore, is also being set up.

Then there is the cost of higher global crude oil prices, which have brought down the margins of domestic oil marketing companies (OMCs) close to four-year lows as these higher prices haven't been passed on to consumers at the pump. This will hurt their dividend to the Centre—and if the government decides to reduce the excise duty, tax collections will be hit. Either way, the carefully-constructed fiscal deficit and debt-to-GDP targets of 4.3% and 55.6% of GDP are at risk; just a few weeks after the 2026-27 Budget was presented.

• POLICY

Why Transgender Protection (Amendment) Bill 2026 has attracted criticism

Anagha Jayakumar
& Partha Sarathi Biswas
New Delhi, Pune, March 17

A Bill introduced in Parliament last week seeks to make major changes to the Transgender Persons (Protection of Rights) Act, 2019, drawing criticism from transgender and LGBT+ groups across the country. The Transgender Protection (Amendment) Bill 2026 seeks to remove the right to gender self-identification, recognised by the Supreme Court in its landmark 2014 judgement, and introduce medical certification for gender recognition.

Definition in the 2019 Act

The 2019 Act defined a transgender person as one whose gender does not match the gender assigned to that person at birth. These include—

• Trans men and trans women, regardless of their having undergone gender-affirming (officially sex reassignment) surgery, hormone therapy or other therapies

• Persons with intersex variations

• Genderqueer persons (interpreted as including non-binary identities)

• Persons with such sociocultural identities as *Kinnar*, *hijra*, *aravani* and *jogra*

This definition differentiates between sex—which refers to one's biological status as male or female based on one's anatomy, chromosomes, and hormone prevalence—and gender, a construct that determines roles, behaviours and attributes that society deems acceptable for men and women. So one's gender identity, or a person's sense of self and their gender, may or may not correlate with the sex assigned at birth.

What 2014 judgment entailed

In *NALSA v Union of India* (2014), the Supreme Court recognised the transgender community as the "third gender" and affirmed equal applicability of fundamental rights under the Constitution to trans persons. It also affirmed the right to self-identify one's gender, meaning a person could thus identify as male, female or third gender.



A protest against the Bill in Bhubaneswar. PH

The court told the government to frame laws to ensure legal recognition to the transgender community as the "third gender" and take steps for their welfare.

In 2019, the Centre implemented the Transgender Persons (Protection of Rights) Act, which provided for the legal recognition of the community. In practice, this meant

the inclusion of the third gender (other) in all official forms, the formation of the Transgender Welfare Board, and a mechanism to distribute transgender identity cards. These cards allow trans persons to access various government services and facilities. Around 32,420 such cards have been issued to date.

Changes proposed in the Bill

NARROWER DEFINITION: The Bill calls the definition of a trans person under the 2019 Act "vague" and only recognises the subset of persons with sociocultural identities such as *Kinnar* and *hijra*. It creates a new category describing any adult or child who has been compelled to assume a transgender identity through mutilation, emasculation, castration, amputation, or surgical, chemical, or hormonal procedure.

REMOVAL OF SELF-IDENTIFICATION: A key outcome of *NALSA v Union of India* was captured in Section 4(2) of the 2019 Act, which enshrined the right to self-identify. The Bill says the Act was not intended to protect "each and every class of persons with

various gender identities, self-perceived sex/gender identities or gender fluidities."

MEDICAL BOARD: Under the 2019 Act, a transgender person applied to the District Magistrate and received a certificate of identity, without any medical examination or clinical gate-keeping. The new Bill mandates the formation of a medical board led by a Chief/Deputy Chief Medical Officer, at the centre or state/UT level. The DM must now take the board's recommendations, as well as those of other medical experts where relevant, before issuing a certificate of identity.

PUNISHMENT: The Act authorised punishments from six months to two years of prison, plus a fine, for pushing a trans person into forced or bonded labour, denying access or right of passage to a public place, forcing a trans person to leave their place of residence, household or village; and for causing harm, injury, or endangerment.

The Bill adds four clauses, attracting at least five years rigorous imprisonment and a fine. Two of these pertain to kidnapping and injuring a person to force assumption of

trans identity, while the other two punish the crime of forcing a person to present as transgender and engage in begging, servitude or bonded labour. The new clauses outline harsher punishments for child victims.

Criticism of the Bill

Trans persons and activists say the amendment has taken away the right to individual self-determination of gender. Pune activist Kadambari Shaikh called this a violation of human rights. "Our identity should not need approval from others... Any change in the law must protect this right and support the freedom and dignity of transgender persons," she said.

Anil Ukaranke, founder of Yutak, an LGBT+ organisation, said: "The amendment has talked about a medical board... For a trans person, this would be difficult, given the dearth of trans health in society."

The new definition recognises only transgender persons from certain "sociocultural" backgrounds, which are "centres of power as well as exploitation", he added.

Businesses Can Fight War-Fed Ecocide

By stepping up pace of clean energy use

Remember climate change? Planetary degradation serious enough for the world to take action — barring the Trump lot, that is, who still thinks it to be as real as Santa? Wars, especially the latest one across West Asia, have been releasing gargantuan quantities of burning oil and gas, making what was anyway a steep task of reducing GHG emissions, now seem downright pointless. According to a 'One Earth' study, Israel's attacks on Gaza alone generated some 33mn t of CO₂-equivalent, an amount comparable to 7.6 mn petrol-powered cars. Initiative on GHG Accounting of 'War' data shows Russia's war against Ukraine has already caused more than 300 mn t of additional emissions, equivalent to France's annual output.

Iranian foreign minister Abbas Araghchi has stated that Israeli strikes on fuel storage facilities in Tehran have caused 'ecocide', causing long-term damage to residents' health and well-being, with possible soil and groundwater pollution affecting future generations. Everyone waging war — and contributing to it, not the least the global weapons industry — is a contributor to a mass ecocide.

Wars are, by definition, sites of major fires, toxic smoke and destruction. So, should we now be numbed into inaction? There is a smarter alternative: to let bombed refineries, disrupted shipping lines, sky-rocketing costs of crude, natural gas and LNG push countries to step up pace of clean energy use. Smart businesses should leverage this multi-crisis to provide alternatives — pushing ahead with electrification to compete with fossil fuels. Consumer demand for uninterrupted energy supplies at affordable prices can push government to make regulatory changes — such as revisiting electricity tariff design — earlier thought of as near-impossible.

Transition away from fossil fuels was never going to happen overnight. But with the pendulum now swinging to the extreme end of ecological suicide because of wars, consumer demand and business opportunities can at least push for a shift that is palliative, logical and, indeed, profitable.

MACROECONOMICS

Keep at It to Stall Inflation as it Creeps

Inflation is creeping up. Conflict in the Persian Gulf is likely to add to pressure. The effect, though, should be muted by transient surge in energy prices and their incomplete transmission at the retail level. There will be knock-on effects on metals and other commodities in line with the duration of trade disruption. Stable core inflation is expected to create the space for an extended period of accommodative monetary policy, which may be called for to curb financial market volatility caused by the West Asia situation. The rupee's slide will contribute to an extended pause in interest rates.

Risks to growth from geopolitical uncertainty are higher. Surging metal prices pose challenges to industrial growth. Domestic demand remains resilient on the back of tax cuts. But exports have been squeezed by US tariffs and are likely to face extended shipping disruptions. The trade scenario remains uncertain due to new US investigations involving India, and expected delays in signing a deal with Washington. Downside risks to growth will also weigh in favour of monetary accommodation, particularly if data indicate a further loss of economic momentum. It will take months after the West Asia conflict ends for global supply chains to stabilise. Policymaking will be cautious over this extended window.

Need for stability on the export front will become more evident as the stimulus for domestic consumption runs its course. Consumption is accelerating sequentially. But government expenditure and private investment could do with some vigour. India may not have to deal with a full-blown energy shock yet. But it will have to keep working on its growth drivers.



JUST IN JEST

From April 1, UP will have expiry dates stamped on eggs — this is no yoke

Eggsactly What the Doctor Ordered

Unlike the conundrum over chicken and egg, we can safely assume that egg came before its expiry date — for consumption, that is. Notwithstanding the salience of the date from when the rule becomes effective — April 1 — the UP government has made it mandatory for eggs to come stamped with expiry dates. Not just cartons but also individual end-caps. At last, the humble oval has joined the bureaucratic elite. Each omelette will now carry the heft of a passport.

Chickens, once carefree (re)producers, will now face audits. Eggs without dates will — no, not be tagged illegal immigrants but — be destroyed or labelled 'not fit for human consumption'. For protein's non-permanence must be maintained. At an ambient temperature of around 30°C, eggs are fit for eating (by humans) for about 2 weeks after they have been laid (by chickens). Stored in temperatures between 2°C and 8°C, they're good for around 5 weeks. But the problem is that UP has a paucity of andha that is thanda. Ergo, this stamp of appropriate age. We may soon have expiry dates on bananas ('Best before brown'), on politicians ('Ministers till 75'), on WhatsApp forwards ('Best before irrelevance'). Uttar Pradesh sure has cracked open a new frontier — accountability for sunny-side ups, or burjis, or boiled. Now to see they stamp gently on those delicate shells. Else, the yoke will be on them.

CURSOR India would do well to separate US the nation, from its misrepresentative Trump

Iran-a-Lago Ain't America

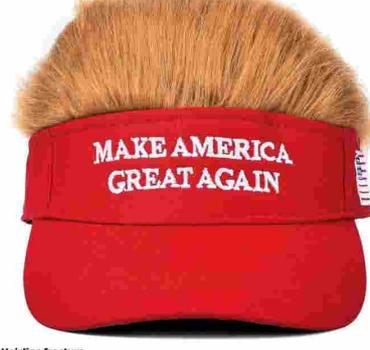


T K Arun

As US president, Donald Trump's commander-in-chief of the US armed forces, and able to use their lethal force to launch attacks on foreign shores, and even wars. Yet, he doesn't represent the United States of America in its entirety. It is possible to argue that Trump misrepresents the US, that he is misrepresentative for his nation. Distinguishing between a traitor leader and the nation itself has one strong implication. India has good reasons to maintain good relations with the US as a long-term, institutional partner in multiple endeavours, including countering China in the Indo-Pacific, but no reason to accommodate or defer to Misrepresentative Trump's misadventures and irrational expectations.

In other words, India has the latitude to condemn Trump's attack on Venezuela and Iran, and torpedoing of an Iranian ship in the Indian Ocean, because it had accepted India's invitation to take part in a naval exercise, and to ask Trump to cease and desist from his attack on the world economy.

When Trump promises to give New Delhi 'permission' to import oil from Russia, India can, and should, tell him where he gets off. This is not a terribly novel proposition. In fact, countries follow this principle in their conduct of international relations. Take Iran's levity of attitude towards India's request to let India-bound ships pass through the Strait of Hormuz without harm. Iran does this because it makes a distinction between the current Indian regime and India as a nation with which Iran has had friendly and mutually respectful relations. India's current leadership did not condemn the US' unprovoked breach



Hairline fracture

of Iran's sovereignty, assassination of its ayatollah, and bombing of its cities without any legal sanction. The UN exists to authorise collective international action against violators of rules of international law, and consistency that nations sign up to as members. Even as India had not condemned the US-Israeli attack on Iran, it condemned Iran's Iranian defensive fire.

India holds the BRICS chair this year. The grouping includes Iran as well, since Jan 1, 2024. BRICS' mission is to bring the largest emerging economies together to advance their collective interests, particularly to reform the global architecture of economic, political and financial power. That mission acquires ever-greater salience with the emergence of Misrepresentative Trump at the helm of the US, wrecking the global rules-based order, imperfections it was, and ready to use military might against anyone with cavalier disregard for norms of any kind. BRICS has ceased to operate, with

many Guard Corps, Iran will decide when to stop firing missiles and drones, and thus end the war. When that happens, the only gainers of sorts would be Israel, which would emerge as the region's hegemon.

Dubai is no longer the global billionaire's beckoning playground, a financial centre rivaling Singapore. It's now a place of high geopolitical risk. Saudi Arabia's modernisation ambitions have been hit. Qatar will have second thoughts about hosting a US base. All Gulf Arab regimes are under pressure from their public opinion to stop pretending they are little chicks nestling under the protective wing of Mummy US.

Republicans have lost their reputation at home for being the party to be trusted with the economy. Rise of gold as a safe haven signals erosion of faith in the US dollar as a safe haven for global wealth. In terms of its hegemonic role in global finance, the dollar is now in terminal decline.

A scholar of Trump's side in the November mid-term elections to the US House and Senate seems inevitable. Even prior to Trump 2.0, US science and tech had been under attack in many strategic areas. That trend has accelerated with Trump's attacks on US academia, and cuts in grants for scientific research. It is just as clear that when India was not just far weaker than now vis-à-vis the US, but also was dependent on it for scarce foreign needs. New Delhi had the gumption to criticise Wash-

ington over Vietnam and other imperialist ventures. Trump and his MAGA base see him as god's gift to America and the world. New Delhi should stop acting as if it belonged to these Deplorables.



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Iran's Strait of Hormuz

handfuls of European frigates do in the Strait of Hormuz that the power of the US Navy cannot do. For the record, the US Navy was the first to refuse to get in the line of Iranian drones. It announced last week it wasn't ready to escort ships through the strait. A premature declaration from energy secretary Chris Wright last Thursday that the US Navy will soon escort oil tankers was shot down by the White House faster than you could say Hormuz.

Iran's weaponisation of the water is asymmetric warfare that any war-gamer worth his/her salt would have envisioned. Iran's new/old leaders have declared the US and its allies won't be allowed peaceful passage through the Hormuz. Everyone else is well-come to sail through — provided there's a good quid pro quo for Tehran in the shape of desperately needed supplies. So far, two Indian, one Pakistani, and one Turkish vessel have been cleared.

Tehran's tactics are proving effective. For now, but its really ally may turn out to be American public opinion if the Democrats can galvanise their constituencies. So far, the Dems' message is all over the place. Almost as scattered as Trump's own, even though conservative analysts insist they see method in the madness.

Trump did say on Monday he believed he would have the honour of taking Cuba. 'Whether I free it, take it. I think I can do anything I want with it.' The statement is significant in terms of the US and Cuba are in talks aimed at reaching a preliminary understanding after decades of hostility.

That accommodation means removal of President Miguel Diaz-Canel from office. Cuba is expected without oil and electricity. And it can't do a Hormuz.

Oil's Fair and Square

New York: How high will price of crude oil rise? The answer depends on another question: how long will the US-Israel war against Iran last? And the answer to this second question depends on a third question: how long can Donald Trump continue the war without worrying about its repercussions on the forthcoming mid-term elections? The longer the conflict continues, the tighter the global supply of oil and gas will become, and the higher prices will climb, and the greater would become Trump's chances of losing the House, or Senate to Democrats in the mid-terms.

In the first three weeks of the war, crude prices have already risen by roughly 20% from their pre-war levels. That's a sharp increase, but still modest compared with earlier oil price shocks in West Asia.

During the first oil crisis in October 1973, when Opec imposed an embargo on countries that supported Israel during the Yom Kippur War, crude prices quadrupled. The second oil shock followed the 1979 Iranian Revolution, when oil prices surged roughly two-and-a-half times. Disruption in oil supplies after the Soviet invasion of Kuwait nearly

doubled the price of crude. History suggests that oil prices could rise far beyond what we have seen so far. Risk of natural gas price increase is much higher, because it's more difficult to store and transport. Goldman Sachs has projected that the LNG flows through the Strait of Hormuz are completely halted for a month, Dutch natural gas, or TTF (Title Transfer Facility), could approach €74/MWh, an increase of 138%. If the disruption lasts 2 mths, European natural gas prices could rise to more than €100/MWh.

Ironically, perhaps the only thing that can push Trump to end the war is price of gas and oil. Having launch-

Iran's Strait of Hormuz

ed the war, he faces enormous pressure to continue it until he can claim a victory — either by dismantling Iran's capacity to build a nuclear weapon or by engineering regime change in Tehran. The latter goal appears unrealistic. Achieving the former would likely require several more weeks. If not months, of sustained military operations. So, Trump finds himself fighting a war while watching his two voters closely: global oil price and performance of the US stock market. As long as Iran constricts the Strait of Hormuz, which carries about one-fifth of the world's oil, higher oil and gas prices are inevitable. What is truly striking is that Washington did not foresee this more predictable reaction. Did the US think it can bomb the hell out of Iran, and Iran would do nothing in response? Trump has repeatedly argued that high oil prices would benefit the US because the country is now an net exporter of energy. That claim is partly true. Yet, oil prices are set in the global market, because US supply anywhere in the world pushes prices up everywhere, including at US gas stations.

If current market forecasts prove correct, the political cost of rising energy prices could quickly outweigh the strategic gains of continuing the war. In that case, Trump may find it difficult to sustain the conflict for more than a few weeks.

US voters are acutely sensitive to gasoline prices. Trump won his second term in part by promising to bring inflation under control. Since then, he has watched gas prices in the US increase by roughly 20%, and diesel prices by about 37%. Higher diesel prices ripple through the entire economy, especially the food supply chain, because fuel for vegetables and other goods must be transported long distances. Rising transportation costs inevitably translate into higher food prices for consumers.

'Trump has demanded' other countries come forward in protecting vessels in the Strait of Hormuz. So far, US allies had earlier rebuffed through Trump's tariffs and jibes against NATO members have stayed away. As expected, Trump is quite unhappy with this raft of refusals.

He has threatened that Nato faces a very bad future. The US may be able to wage the war militarily. But it may struggle to sustain it politically — both abroad and at home. If oil prices continue their upward march, and American voters begin to feel the pain at pumps and grocery stores, pressure on the White House will intensify. In the end, the trajectory of the war may be determined less by events on the battlefield than by numbers flashing on gas station signs across the US.

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The writer is professor of social policy, Columbia University, USA

LETTER FROM WASHINGTON

It's Week 3 and Trump's biggest challenge to Make the Strait of Hormuz Great Again — free of Iranian mines and missiles, and flowing to the old rhythms. He wants help. But no one seems to be coming. The US-Israeli bombing of Iran for 18 days has come down to a face-off at Hormuz, a critical oil lifeline for the world. Iran has laid mines and threatened to drone tanks of hostile powers. Not one litre of oil can go through without Iranian military's approval.

Hormuz accounts for one-fifth, or about 20%, of global oil flows. Last heard, an average of 20 mn barrels moved through the waterway in 2023. Also important is the flow of fertilisers, since a third of global trade goes through the strait. Sowing season starts next month. India, the largest importer of urea, was threatened to ask China, the largest producer, to ease export restrictions on the fertiliser.

In short, Hormuz blocked is calamity unlocked with global economic impact of the kind the US war president and the Israeli (perpetually-at-war) prime minister didn't plan for. Now, the mighty must defend the waterway — 150 km long, but only 24 km wide at its narrowest, narrowest point. Going back in history, Babur recognised its vast importance and talked about how trading alone in carrying them from distant Central Asia to the Hormuz to reach lucrative markets.

Trump spent time personally calling European allies over the weekend, asking them to send warships to the strait that currently looks like Gurgaon-on-sea at rush hour. Tankers and ships are lined up and waiting to exit. But several leaders he asked have either refused, or got an acute case of hesitation.

Italy's Giorgia Meloni had distanced herself from her friend before he even got a chance to ask. As things currently stand, Japan is outscasting, Britain is pondering — although reserves in both countries want their governments to help, as they see logic in Trump's claim that they are more dependent on oil through Hormuz than he is. France will help only in defensive operations. China is mum, and Russia is smiling. Germany said a hard 'nein', with defence minister Boris Pistorius spelling it out: 'The allies of our war, we have not started it... (Besides), what can a handful or two

HELP ME! OPEN HORMUZI!

Will work for gas

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THE SPEAKING TREE

Learning To Give

SUDHA DEVI NAYAK

'The term 'noblesse oblige', meaning 'nobility obligates', was used by the French writer Balzac, and refers to the medieval period when nobles and feudal lords were obligated to act generously towards the less fortunate. Wealth is more than legacy Warren Buffett, the American investor and philanthropist, says. A very rich person should leave his children enough to do anything but not enough to make them rich.

Dr Gandhi said if a free society cannot help the many who are poor, it cannot save the few who are rich. Wealth is to be treated as a trust for the benefit of the community, and a trustee has no right but humanity.

The act of giving is not confined to the affluent alone; each of us, even with fewer resources, can contribute our mite to those in difficult circumstances. It is important to realise that many around us live below the breadline, leading peripheral existences.

We experience fulfillment in the luxury of giving as well. As the good pastor says in the Vicar of Wakefield. All material joys and their accompaniments are impermanent; we are all subject to the turning of the wheel. Hence, it is important to remember that, in this bleak time, we must share whatever we can, according to our station. Giving is not always an unselfish act. As the good pastor says in the Vicar of Wakefield. All material joys and their accompaniments are impermanent; we are all subject to the turning of the wheel. Hence, it is important to remember that, in this bleak time, we must share whatever we can, according to our station. Giving is not always an unselfish act. As the good pastor says in the Vicar of Wakefield. All material joys and their accompaniments are impermanent; we are all subject to the turning of the wheel. Hence, it is important to remember that, in this bleak time, we must share whatever we can, according to our station. Giving is not always an unselfish act.

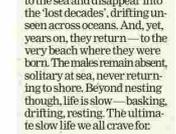
PEAS IN A PODCAST

Ocean's Mythic Travellers

Each year, India's eastern coastline becomes the destination of an unmissable, restless ocean wanderers with no maps, only instinct, and the pull of shifting seas. They cross vast distances and arrive on Odisha's shores. They are Olive Ridley's, small, olive-shelled, their heart-shaped carapace carrying a lifeless in motion.

'One into one' episode of The Olive Ridley Odyssey of the podcast, 'Fantastic Beasts and How to Save Them', hosted by Bangalore duo Vishashwini and Anand, and follow thousands of these creatures emerge from the surf, carving slow signatures into the sand.

This is the most epic of the 'lost decades', drifting unobserved across oceans. And, yet, years on, they return — to the very beach where they were born, to possess a large and solitary at sea, never returning to shore. Beyond nesting though, life is slow — basking, drifting, resting. The ultimate life, life all craves for.



Chat Room

Biz-Focused Gov, Jobs-Focused Biz

Apropos 'The Unmoved Bengal Files' by Subhamoy Maitra (Mar 7), the debate over land and industrialisation in West Bengal continues to redress a deeper development dilemma. For decades, the state has struggled to create sufficient industrial employment. Bengal requires a large and educated workforce. Attempts to revive industrial growth have repeatedly run into political and social resistance over land acquisition. Movements such as Singur and Nandigram turned land rights into a powerful political issue. At a time when employment generation is urgently needed, political discourse often focuses more on welfare promises and electoral theatrics than on long-term economic strategy. West Bengal requires a 'business policy' that respects land rights while also encouraging responsible industrial investment to secure quality jobs for its youth.

Sanjay Chagra Mohali



SONAM WANGCHUK
Activist

“A win was not enough. I wanted a win-win... we had to struggle so much, walk to Delhi, sit on Anshun. All movements in Ladakh are for starting the dialogue process



SAUGATA ROY
Tirunelveli Congress leader

Dr Jekyll is the good man doing good projects, while Hyde does not provide minimum services to the poor. Attention should shift from high-speed glamour trains to trains carrying poor people



JOE KENT
US National Counterterrorism Center

Iran posed no imminent threat to our nation, and it is clear that we started this war due to pressure from Israel and its powerful American lobby”

Transgender Bill under a cloud

The idea of a Nanny state drawing the boundaries of morality for people is anathema to mature and evolved democracies. It must be left to individuals to exercise their freedom of choice. Governments must keep this fundamental principle in mind while formulating laws that have wider social ramifications. When they fail to do so, public backlash is only to be expected. The Transgender Persons (Protection of Rights) Amendment Bill, 2026, introduced in Parliament last week, falls into the category of legislation that is hurriedly put together without wider consultations. The Bill, seeking to replace the 2019 Act, has a fundamental flaw as it alters the statutory definition of transgender person. It scraps the category of transgender individuals to self-identify. As per the new Bill, gender recognition for a transgender person will now depend on medical verification rather than self-identification. This makes it harder to obtain documents such as transgender identity cards or certificates because it introduces bureaucratic verification of a transgender person's identity. In a society that treats transgender persons with derision, requiring official verification could expose them to discrimination and create additional barriers in accessing education, employment and healthcare. While supporters of the amendment argue that clarity in definition is necessary for the effective administration of statutory benefits and protections, it must be pointed out that constitutional guarantees extended to transgender persons have to be respected.

The new Bill prioritises biological determinism over self-identification, weakening rights-based protections

In a landmark judgment in 2014, the Supreme Court recognised the right of transgender persons to determine their gender identity as an intrinsic aspect of dignity, autonomy, and equality. The new formulation marks a significant departure from the 2019 Act, which defined transgender persons broadly as individuals whose gender identity does not correspond with the gender assigned to them at birth, irrespective of whether they have undergone medical transition. The Statement of Objects and Reasons of the Bill asserts that the law should not extend protection to individuals claiming gender identity based on “self-perceived” characteristics, but only to those who experience discrimination due to biological conditions beyond their control. The objective, according to the amendment, is to ensure definitional precision so that statutory benefits reach a clearly identifiable class of persons. This, however, goes against the spirit of the apex court's 2014 ruling, which decisively rejected a biologically deterministic approach to gender recognition. The SC had emphasised that gender identity is fundamentally shaped by psychological self-perception and lived social experience. By grounding gender identity within the guarantees of Article 21, the court recognised the right of individuals to determine their gender identity independent of medical or biological validation. Ironically, the latest amendment risks going back to the very framework that the SC sought to dismantle.

Despite recognising gig workers under Code on Social Security, Budget fails to allocate funds or outline plans



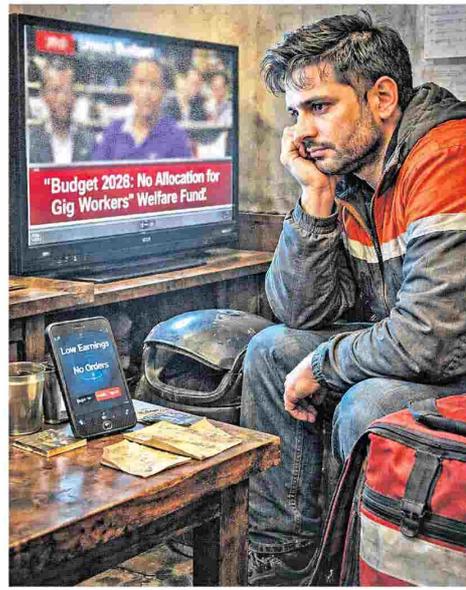
SUNETRA GHATAK SOUMEN GHOSH

Six years ago, we witnessed a historic moment when the Code on Social Security, 2020, was acknowledged in India's labour law architecture. It formally recognised gig and platform workers as a distinct category, departing from the traditional binary framework of employer and employee to extend social protection. India took a landmark step in late November 2025 by implementing this Code. This long-awaited reform was expected to reshape the country's labour market by providing social security and protection to gig workers.

Now, nearly six years after its enactment and months after the labour codes became operational, expectations were high that Budget 2026 would articulate the fiscal operationalisation of these provisions. Contrary to these expectations, the Budget made no dedicated allocation for gig workers. No timeline has been provided for activating the Social Security Fund, nor is there clarity on the government's co-financing commitments.

The Disconnect Interestingly, the Economic Survey offered a more candid assessment of gig work. It noted that a substantial proportion of gig workers earn below Rs 15,000 per month, face high income volatility, remain outside health insurance, maternity benefits, and old-age security. Moreover, it highlighted algorithmic control as a source of insecurity, noting that platform-determined work allocation and opaque wage-setting mechanisms limit workers' bargaining power.

The Survey recommended minimum earnings standards, portable social security benefits, and mechanisms to address income instability. However, Budget 2026 failed to incorporate these analytical insights. There was no dedicated allocation for gig workers, and no



consideration was given to budgetary instruments or policy timelines. The disconnect between the Codes on Social Security and Budget 2026 signals a broader pattern in India's labour reform strategy — legal modernisation without commensurate fiscal commitment. While the legal framework has expanded to accommodate a workforce of over 500 million, budgetary policy remains grounded in traditional labour definitions, favouring formal employment over informal welfare arrangements.

Policy Gap As a result, gig workers continue to occupy a complex and ambiguous position. They are neither part of formal employment structures that grant access to contributory social insurance nor sufficiently recognised within informal welfare frameworks to qualify for traditional social assistance schemes.

This is a major concern not only from an equity perspective but also for its macroeconomic implications. Gig workers are no longer a marginal labour market phenomenon; rather, they have become a structural component of urban service delivery and consumption growth. They now contribute measurably to GDP while absorbing a growing

share of the urban workforce. An economy increasingly reliant on insecure labour cannot sustain aggregate consumption demand or long-term productivity growth. This is especially concerning given that a significant portion of gig work involves feminised labour. Nowhere is this policy gap more visible than in India's rapidly expanding platform-based economy. In particular, the emergence of ultra-fast or “quick delivery” models — often promising customers deliveries within 10-15 minutes — has further intensified vulnerabilities faced by gig and platform workers.

Food or grocery delivery platforms increasingly rely on dense delivery networks and strict time-bound performance metrics to maintain a comparative advantage. In this hyper-competitive model, delivery partners operate under

Budgetary policy remains anchored in traditional labour definitions, favouring formal employment over informal welfare arrangements

algorithmic management systems that reward speed and penalise delays. This often pushes workers towards unsafe driving practices and irregular work schedules in order to secure higher ratings and wages. The absence of formal job contracts, employment security, health insurance, accident coverage and income stability further magnifies these vulnerabilities. Operational risks and market uncertainties are effectively transferred onto workers themselves. As the “quick delivery” economy expands across Indian cities, it institutionalises a labour regime marked by precarity, informality, rising occupational hazards, and minimal regulatory oversight. This condition stands in stark contrast to the broader objectives of employment security and job stabilisation highlighted in the Budget's rural employment discourse.

Missed Opportunity The Budget adopted a growth-centric framing, remaining cautious while aligning with India's macroeconomic priorities. It emphasised rural employment and livelihoods through the Viksit Bharat-Guarantee for Rozgar and Aajeevika Mission. The scheme aims to provide 125 days of guaranteed wage employment per rural household, positioning itself as the government's primary instrument for rural labour security and income stabilisation.

At the same time, allocations for MGNREGA have been scaled back to adjust pending liabilities and support a transition phase. While the government maintains that MGNREGA will continue alongside the new scheme for now, concerns remain that a shift towards cost-sharing frameworks with States may dilute its rights-based employment-guarantee approach. Overall, Budget 2026 missed an opportunity to integrate protection for gig or platform workers with existing policy missions on women's employment, urban livelihoods, skilling and financial inclusion. If the Code on Social Security is to be more than symbolic, future Budgets must move decisively from recognition to operationalisation. The question is not whether the State can afford to extend social security to gig workers; it is whether the economy can afford not to.

Budget 2027 must translate institutional and legal recognition into concrete fiscal and institutional commitments through a well-structured, inclusive social security fund, co-financing arrangements between different levels of government, flexible benefit frameworks and a minimum earning safety net. Only then can India's gig-driven economic growth remain compatible with job security, income stability, and sustainable demand in a transforming urban economy.

(Sunetra Ghatak is Associate Professor, OP Jindal Global University, Sonapat. Soumen Ghosh is Assistant Professor, RV University, Bengaluru)

Letters to the Editor

Well-deserved
The prestigious Sahitya Akademi Award 2025 being conferred upon Nandini Sidda Reddy, is a moment of immense pride for Telangana's literary community. His poetic collection *Animesha*, receiving this national recognition, marks not only a personal milestone but also a significant acknowledgement of contemporary Telugu literature. What makes this honour particularly meaningful is the thematic depth of *Animesha*. Though the title evokes the divine, the poems are firmly grounded in the lived realities of ordinary people during the pandemic. The work's

poignant portrayal of migrant workers reminds readers that literature remains a powerful medium for documenting social suffering and resilience. As the first chairman of the Telangana Sahitya Akademi, he played a crucial role in promoting Telangana's regional dialect, folklore, and literary heritage. His earlier achievements — including the Nandi Award for the stirring lyrics in the film *Poru Telangana* — reflect his rare ability to bridge the worlds of creative literature, cultural activism, and public consciousness. His journey from a village in Siddipet to the national literary stage is an inspiring reminder that powerful writing often emerges from the deepest engagement with people's lives.
VIDYASAGAR REDDY
KETHRI, Warangal

Write to us at letters@telanganatoday.com

Cartoon Today



India in the hotspot

- Financial Times
India's restaurants stop deep frying
In India, crematoriums have stopped using gas to burn their dead and restaurants have stopped deep frying food. The war on Iran has disrupted energy supplies but South Asia has been among the worst affected regions.
- The New York Times
India wondering how to keep stoves lit
In kitchens across India, the familiar blue flame of a gas stove symbolizes both modern convenience and successful policymaking. This week, that flame flickered. War in the Middle East has threatened the supply of LPG.
- BBC
Can India's outsourcing survive AI?
Indian technology stocks have seen an unprecedented rout over the past few weeks over fears of AI upending the traditional outsourcing model that powers the country's \$300bn (£223bn) back-office industry.

THE ASIAN AGE

18 MARCH 2026

EC can't act arbitrarily, rein in transfer powers

The midnight operation of the Election Commission (EC) replacing the senior bureaucracy in West Bengal including the chief secretary to the government, the home secretary and the director general of police without consulting the state government immediately after it announced the schedule of elections to the state Assembly is an instance of unprecedented arbitrariness, administrative excess, breach of propriety and violation of democratic principles. The EC's action is backed by the Model Code of Conduct, and not by a law, and hence must be considered an act in violation of the constitutional and legal rights of the state.

Article 324 (1) of the Constitution vests "the superintendence, direction and control of the preparation of the electoral rolls for, and the conduct of, all elections to Parliament and to the legislature of every state" with the EC, while Article 324 (6) enjoins upon the President, or the governor of a state, to make available to the EC such staff as may be necessary for the conduct of the elections. However, the Constitution does not confer on the EC the right to take over the functioning of the elected government and the bureaucracy and run them while it holds elections.

It is important that the state must act in aid of the EC for the conduct of free and fair elections. It is also important that the EC must have a free hand in running the election machinery which comes from the state governments concerned. It should have the power to remove an officer or a staff who it thinks does not help accomplish its all-important mission. The state government concerned must extend its cooperation in addressing the issues the EC flags. They square with the demands of the constitutional scheme, but shunting out of the entire top brass of the state administration does not.

A state government draws its rights for functioning from the Constitution, and the State List and the Concurrent List mentioned in the Seventh Schedule, to be precise. Declaration of election to Parliament or to the legislature does not provide for the suspension of the Constitution or the rights mentioned in it; nor does it absolve the state government from discharging its duties with the help of the machinery at its command. Needless to say, it does not call for the EC to take over the functions of the state government.

The Constitution makers would have intended the governments, whether at the Centre or in the states, would work in tandem to undertake one of the most sacred of acts in a democracy, that is the conduct of elections. They would not have in their wilder imagination anticipated a hostile takeover of the administrative machinery of a state by the EC, encroaching upon its right to function under a constitutional scheme.

Parliament must ponder over fine-tuning the election process in the country and make laws that regulate the conduct of the EC and the governments during the time of elections. It must weigh the demands for the conduct of the free and fair elections and the functioning of the governments, and design a just and fair template that empowers each arm of the state in discharging its duties. Arbitrariness and ad-hocism cannot be the hallmarks of a functioning democracy.

Who will call off this mad war?

The Iran war is not a war but the world is paying the price for it as oil prices soar, trade routes be distorted and lives have been thrown out of kilter. When the war ends would depend on who can call it off. Not the US President Donald Trump who is so deep into it now and is being prodded by Gulf states to step up operations and emasculate Iran's military might. It cannot be the governments, and Iran pleading for an end to the war seems distant because it sees this attack by USA and Israel as an existential threat and has the ideological urge to keep fighting. That all's fair in war is a given, but how logical is it even in military and strategic terms that Iran should lob ten times the number of missiles at the Arab nations in the Gulf as it has aimed at Israel itself?

The price of permanent enmity is what the Shia-majority Iran will have to live with in a region dominated by Sunni Muslims. But this is what the regime of theocrats, who are hardly in control of their actions in the Iranian Revolutionary Guards Corps, has had to risk because it can hit back at the US more directly.

It would stand to reason that air power alone will not deliver the political objectives of a true regime change or revolution in a country like Iran that thinks nothing of killing its own as it has in hundreds of thousands over five decades to suppress revolt, dissension, and even criticism of a brutal rule.

Having got the war that it always wanted to wage against its sworn enemy with an ambition to build nuclear bombs, Israel is not in a mood to stop now though all it can do is to take aim at the leadership with intelligence inputs as it always has and continue the missile and drone war.

The Gulf nations did not expect Iran to cross every red line with them but now are stuck with more deadly expectations for their image and safety and security so carefully built over decades has been compromised.

Such is the irony of war that Russia, the invader of Ukraine, is posing as an interlocutor but even that country must not see the war as a bonus as it is able to sell its oil at inflated prices as the US has done away with sanctions to take some heat off boiling energy markets.

THE ASIAN AGE

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The next battlefield in Tibet, over Buddhism!

Claude Arpi

Strategic analysts have a hard time for the past few years; most of their views and predictions have gone wrong due to the turmoil occurring all around the world. It is particularly true since the beginning of the Russia-Ukraine war, which was supposed to last only for a few days.

New war tactics and weaponry, for example the use of drones, have appeared in a big way. If it does not want to lose coming battles, India does not have much choice, it needs to take a relook at the battlefields. In these circumstances, information warfare takes an increasingly predominant place.

China has always been far ahead of the rest of the world in the field of propaganda and information warfare, which has sustained the totalitarian regime for decades. Today, however, one of China's favourite themes is Buddhism.

Beijing would like the world to believe that Buddhism has for centuries been an important component of Chinese civilisation and that China should take the lead in the propagation of the teachings of the Great Monk. Beijing wants to teach Buddhism to Tibet. In September 2025, a meeting was convened in Lhasa by Wang Junzheng, the secretary of the party committee of the Tibet Autonomous Region, to address Communist officials dealing with "religion".

It is not surprising that a State, which follows Karl Marx's atheist precepts should deal with religion? Wang insisted on the necessity "to earnestly study and implement General Secretary Xi Jinping's important instructions on religious work and... systematically promote the Sinicisation of Tibetan Buddhism." To be "stable", Tibet needs to be Buddhist, but with Chinese characteristics.

Wang mentioned Xi Jinping's visit to Tibet in July 2025, during which the President gave "important instructions" - to emphasise Buddhism with the requirements to systematically promote the Sinicisation of China's religion, strengthen the governance of religious affairs and rule of law and guide Tibetan Buddhism to adapt to the socialist society.

In other words, first Marx and then the Buddha. On November 11, Wang Junzheng, again presiding over a symposium on religious legislation in Tibet, asked the participants to "soberly promote the construction of the Chinese national community, actively guide Tibetan Buddhism to adapt to socialist society".

On the occasion of the 30th anniversary of his enthronement, Gyaltsen Norbu, called the "fake" Panchen Lama by Tibetans, mentioned the succession of the 14th Dalai Lama. Norbu said: "The reincarnation of the living Buddha is an internal affair of our country. Historically, the reincarnation of living Buddhas in Tibetan Buddhism in China has always adhered to the principles and traditions of domestic search, and there has never been a precedent for visiting abroad".

He added: "China's living Buddha reincarnation system belongs to Chinese monasteries, and its reincarnation management is an integral part of China's religious affairs management".

China is betting for a Chinese Dalai Lama, something that the latter has ruled out. In December 2025, India took the initiative of organising a four-day international conference on "Cultural and Historical Significance of His Holiness the Sixth Dalai Lama, Gyawa Tsangyang Gyatso" in Tawang. The sixth Dalai Lama was born in the 17th century in Tawang, Arunachal Pradesh.

Shantarakshita predicted that a dispute would arise between the Indian and Chinese schools of Buddhism. The dispute was sorted out through the famous Samye Debate.

In a post on X about the event on the Sixth Dalai Lama, Arunachal Pradesh chief minister Penna Khandoi wrote: "Tawang (has) today become the centre of a global academic dialogue on its cultural, historical and spiritual legacy. He continues to inspire humanity through his timeless teachings, poetry and compassion." In another post, he remarked: "The world remembers his poetry, but not the fullness of his teachings and wisdom. It is time that changes."

Beijing was not amused. It believes that Buddhism belongs to China (and that Tawang is Chinese). In a statement about what he called the so-called "international conference", he said that "it represents a blatant provocation to China's territorial sovereignty and the established norms of international relations... Such actions seriously undermine the efforts of both China and India to resolve territorial disputes and enhance bilateral relations. Ultimately, this is a political farce with ulterior motives."

Today, China seems to believe that it is the only power of Buddhism. In this connection, it was a positive move that the recent Global Buddhist Summit was convened by the International Buddhist Confederation, in collaboration with the Union ministry of culture. It took place on January 24 and 25 in the Great Mandapam in New Delhi. It was a new occasion to reaffirm that Buddha is a Son of India.

The two-day conference brought together more than 200 delegates and around 800 participants from India and

abroad, scholars, practitioners and policymakers, to discuss contemporary global challenges viewed through the message of the Buddha. The theme of the summit was "Collective Wisdom, United Voice, and Mutual Coexistence".

The main objective was to convey that India stands for world peace in the troubled times the planet is going through and planetary issues must be faced in the spirit of collaboration, respect for others and mindfulness. It would be good for China to remember history.

During the 7th century AD, after marrying Princesses Bikrutal of Nepal and Wencheng of China, King Songsten Gampo had converted to Buddhism. A hundred years later, King Trisong Detsen requested Shantarakshita, the abbot of Nalanda University, to teach the Buddha Dharma and ordain the first monks. Shantarakshita immediately faced serious difficulties due to the strong opposition from the indigenous faiths. He convinced the King to invite the tantric guru Padmasambhava, who alone could subdue the forces adverse to Buddhism. The Indian Master succeeded in his endeavour and built the first monastery in Samye, south of Lhasa.

But, Shantarakshita predicted that a dispute would arise between the Indian and Chinese schools of Buddhism. The dispute was sorted out through the famous Samye Debate. After two years of intense discussions (782-794 CE), the Indian path prevailed and a proclamation was issued stating that the Indian path was thereafter the state religion. Since then, the National Tradition of Indian Buddhism has been the state religion of Tibet.

India must be prepared to tackle the propaganda onslaught from China; it will be tomorrow's battlefield.

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LETTERS SURREAL NEWS

The controversy involving Benjamin Netanyahu began when a video surfaced during the Israel-Iran conflict, appearing to show him with six fingers on one hand. The unusual visual quickly went viral, fueling speculation that he was dead. As the rumours spread, fact-checkers examined the footage and concluded that the extra finger was merely a visual distortion caused by camera angle, motion blur, or compression glitches. In response, Netanyahu released another video showing both hands clearly. Scepticism then shifted to whether this clarification video was recent. The episode highlights how misinformation can evolve rapidly. It takes time to separate real from surreal news.

R.S. Narula
Patiala

SAFFRON INSIDE

THE REAL INTRIGUE of the Kerala election lies not in whether the state returns to its habit of alternating governments, but in what each front has sacrificed to reach this point. The LDF, once distinct for its ideological clarity, now stands accused of softening its secular stance to appease community interests. The UDF, buoyed by local body wins, finds its momentum stalled by internal discord, proving again that a house divided cannot stand. Meanwhile, the NDA quickly consolidates, no longer a mere spectator but a potential kingmaker. If the two major fronts cancelled each other out through contradictions and complacency, Kerala may witness a reconfiguration that goes far beyond the usual rhythm of rotation.

K. Chidannand Kumar
Bengaluru

BAR CRIMINALS

THE ADR report on West Bengal's legislators is a grim reminder of the criminalisation of politics with 47 pc of MLAs facing criminal cases and 57 pc accused of serious offenses like murder and rape. The Indian judiciary must move beyond mere disclosure mandates. It is time for the Supreme Court to direct a permanent ban on candidates with framed charges for heinous crimes, rather than waiting for convictions that take decades. We need fast-track courts for lawmakers and a legal mechanism to recognise parties that repeatedly field history sheeters.

Jyotikumbar H.K.
Raichur

Pradeep
C. Nair

How Bangladesh, Nepal & Myanmar elections impact India's Northeast

While much of the world's attention in recent weeks has been riveted around the disruptions caused by the war in the Middle East and also around the four-year-old Russia-Ukraine war, what has gone relatively unnoticed are the recent elections in Bangladesh, Nepal and Myanmar; three countries that share borders with Northeast India. These elections will have far-reaching implications not only for these countries, but also for India's Northeast region and for India's relations with these countries. Geography will be a key determinant in shaping future relations: not the rhetoric of anti-India campaigns as was done in the recent past in Bangladesh and Nepal.

After winning a thumping electoral victory, the steps taken by the BNP under Tarique Rahman are indeed very commendable. Under him, Bangladesh has pivoted towards closer ties with India. The BNP leadership has indicated continued cooperation on regional security concerns, that include preventing insurgent groups (of the Northeast) from using Bangladesh territory (a key concern when the interim government headed by Muhammad Yunus reached out extensively to China and Pakistan), countering extremism and undertaking coordination on regional stability issues. The recent visit of the newly appointed Bangladesh DGPI to India, during which time he met India's NSA, Ajit Dvaid, the chief of RAW and the DGMI, clearly signal a move to rebuild ties and address mutual security concerns. The resumption of visa services (largely frozen when Mr Yunus was at the helm), assurance of resuming

key infrastructure and connectivity projects that had been stalled, reassurance on safety of the minorities and support to energy interdependence, that includes maintaining the flow of diesel, are all very encouraging signs. Under the India-Bangladesh diesel supply pact, India annually supplies 1,80,000 tons of diesel via the Numaligarh pipeline. Bangladesh has now requested for an additional 50,000 metric tonnes of diesel from India to shore up its critically low fuel reserves. Around 500 tons have already arrived in Bangladesh on March 10.

The current war in the Persian Gulf has critically affected Bangladesh, which imports 95 per cent of its oil needs. Bangladesh has already introduced fuel rationing, closed a few fertiliser factories and its garment industries are now on the verge of shutting down. The immediate oil needs of Bangladesh will obviously be met by India (not possible for China). The winds of change in relation to India's ties with Nepal have already begun sweeping down the Himalayas. The previous K.P. Sharma Oli government used strong nationalist rhetoric against India, often highlighting border disputes like Kalapani and Lipulekh, besides blaming India for interfering in Nepal's domestic politics. Further, Mr Oli often sought close strategic and economic engagement with China. The election of Pushpa Kamal Thapa, who heads the Rastriya Swatantra Party (RSP), reflects a youth-driven political shift. On Mr Shah's election by an overwhelming majority, India had congratulated Nepal and its citizens, besides signalling its willingness to work with the new leadership. The RSP has

emphasised a policy of "balanced and dynamic diplomacy" with both India and China, emphasising on economic cooperation, cross-border connectivity and trade to convert Nepal from a "bottleneck state into a vibrant bridge". This clearly reflects a more pragmatic economic and strategic engagement with India, leaving aside the ideological hostility the earlier government of K.P. Sharma Oli propagated.

Nationalist rhetoric against India no longer seems to be on the agenda and this will further boost the fact that India is Nepal's largest trading partner. Many infrastructure projects in Nepal depend on India's support, so does transfer of electricity from Nepal to Bangladesh via India.

In Myanmar, the Union Solidarity and Development Party, which is a military-backed party, has come to power, with the government formation likely in April 2026. India was among nine countries that set observers for the election. Besides, India is one of the very few countries which had sent a Track-2 delegation to Myanmar late last year to convey to most domestic stakeholders in Myanmar the functioning of the agenda and this will further boost the confidence of the Indian Constitution, which can be replicated in Myanmar. A likely tweaking of the 2008 Constitution of Myanmar after the formation of the new government in Myanmar will be an important aspect. India are questioning the legitimacy of the election and the military junta's democratic credentials, for India, its core interests lie in engaging with the junta as well as the other stakeholders, which India is doing in any case. The importance of the Kalamand Multimodal

Trade and Transit Project, the Sittoung port and the Trilateral Highway, for not just alternate connectivity routes to India's Northeast, but also for the economic development of some of the most neglected areas of Myanmar (Rakhine and Chin states) cannot be overstated. The new government and the people of Myanmar will continue to view India's engagement as mutually beneficial, unlike the Chinese engagements that smack of resource extraction, ensuring a constant state of turmoil in Myanmar (by arming the Tatmadaw and the ethnic armed militias simultaneously) and a selfish aim of reaching out to the Indian Ocean to become a "Two-Ocean Power".

While dealing with these three countries, what really works in India's favour (as opposed to China) is geographic continuity, characterised by porous borders (unlike the hostile mountain barriers which China shares with Nepal and Myanmar) as also shared linguistic and religious ties (greater transparency and greater trust) with the border people to people linkages, besides mutually beneficial shared hydro systems (unlike the Myitthaon Hydel Project in Myanmar, which exclusively benefited China and led to protests in Myanmar). All these advantages that India holds are revealed in the two seminal books on geography of our times — *The Revenge of Geography*, by Robert Kaplan, and *Prisoners of Geography*, by Tim Marshall.

The writer is a former Assam Rifles D-G and is currently the vice-chancellor of St. Mary's Rehabilitation University, Hyderabad



Singling out West Bengal

The maxim that Caesar's wife must not only be above suspicion but must also appear to be above suspicion has long served as a benchmark for public institutions that wield authority. Judged by that standard, the sweeping reshuffle of senior officials in West Bengal ordered by the Election Commission immediately after the model code of conduct came into force raises uncomfortable questions. The Commission, undoubtedly, has the authority to take measures it believes are necessary to ensure free and fair elections. No serious observer disputes that power. Yet, the scale and selectivity of the action in West Bengal stand out. Elections are simultaneously being held in Assam, Kerala, Tamil Nadu, and the Union Territory of Puducherry. What, then, makes West Bengal so exceptional that the Chief Secretary, the Home Secretary, the Director-General of Police, and even the Police Commissioner of Kolkata had to be transferred at one stroke? All these officers belong to the higher civil services, recruited through the Union Public Service Commission, and have spent decades in government service. They are career administrators, not political functionaries.

Equally puzzling is the manner in which these officers have been replaced. In most cases, the successors are junior officials, who will naturally require time to familiarise themselves with the administrative and security landscape of a politically sensitive state. Election management demands efficiency, continuity, and deep knowledge of local conditions. Frequent and abrupt changes at the top can disrupt rather than strengthen these arrangements. The Opposition's charge that the Commission treats opposition-ruled states differently may be politically motivated, but it gains traction when decisions appear uneven. In earlier elections, including those held in Bihar and Maharashtra, there was no comparable reshuffle at the highest administrative levels, though some district-level transfers were made in Assam. Such precedents make the West Bengal decision appear unusually drastic.

Equally puzzling is the manner in which these officers have been replaced.

The political context inevitably sharpens the debate. Chief Minister Mamata Banerjee has approached the Supreme Court challenging the Special Intensive Revision of electoral rolls, and her party, the All India Trinamool Congress, has been among the most vocal critics of the Commission. But such confrontations are hardly unusual in a democracy; they are part of the rough and tumble of electoral politics. It would be petty to interpret the reshuffle as an act of vendetta. At the same time, the perception of neutrality is as vital as neutrality itself. The BJP may be eager to dislodge the Trinamool Congress from power, and there is nothing illegitimate about that aspiration. Yet, all parties must operate within the same rules. Ultimately, the onus rests on the Election Commission to demonstrate convincingly that its decisions are necessary and proportionate to the goal of conducting free and fair elections in West Bengal. Only then can public confidence in the impartiality of the electoral process remain intact.

Wasting the court's time

The Supreme Court's decision to quash the criminal proceedings against Aishwariya Rai is both sensible and timely. The case had already become largely intractable once the Haryana government informed the court that it would not grant sanction for his prosecution, describing the move as a "one-time magnanimity". The professor had been arrested in May 2025 on the basis of two FIRs over his social media comments regarding Operation Sindoor. One complaint came from a functionary of the BJP, and the other from the state commission for women. The allegations were serious on paper, invoking provisions related to sedition and hurting religious sentiments. Yet, in reality, the controversy stemmed from a few lines posted on social media. The heavens would not have fallen if a few people had read, ignored, or even forwarded the comments. India, with a population of more than 1.4 billion people and a long democratic tradition, should possess the confidence and maturity to deal with such individual aberrations without restraint.

Seen in this light, the immediate registration of two FIRs and the arrest of the professor appeared excessive. A simple warning from the authorities would probably have sufficed. Democracies thrive on the principle that the punishment must fit the gravity of the offence. When speech on social media—however ill-considered—triggers swift criminal action, it raises uncomfortable questions about proportionality. The judiciary itself hinted at this balance during the hearings. While recognising the right to free speech, the court also cautioned that sometimes "writing between the lines creates more problems". That observation is reasonable. Yet, it does not justify the immediate criminalisation that took place in this case. The contrast becomes even sharper when one recalls that, despite complaints and cases, a serving minister in Madhya Pradesh, who made communal remarks about the official spokesperson of the Indian Army during Operation Sindoor, continues in office without facing comparable consequences.

In the final analysis, the episode should serve as a lesson for all sides. For governments, it underscores the need for restraint and proportion while responding to controversial speech. Not every questionable comment requires an FIR or an arrest. Often, a warning can defuse the matter. At the same time, the case is also a reminder to intellectuals and other opinion-makers that social media is not an academic seminar room. Words written in haste can quickly acquire unintended political or communal overtones. Scholars have the freedom to speak, but that freedom carries a responsibility to exercise prudence. Fortunately, the matter has ended without lasting damage to anyone involved. As the saying goes, all is well that ends well—but the wisest course would be to ensure that such avoidable controversies do not arise in the first place.



Guest Column

MANJEEV SINGH PURI

It's been nearly two weeks of the Iran war. The US-Israel strikes have certainly hit Iran hard, but a collapse of its government is nowhere in sight and was not even expected by informed stakeholders. On the other hand, though not talked about, there are sufficient reports of Israel itself being hit, quite apart from strikes in the GCC countries, and not just US assets there. And, without a doubt, global ramifications of the war are being felt through rising oil and gas prices and along with availability issues.

Mediation and diplomacy should have been the order of the day at such a time. However, the UN SG, true to present times, is silent, and so are most Europeans, hit with another hydrocarbon whammy but not wanting any further transatlantic wobble. So are the GCC countries, who had reached out to President Trump with expensive gifts and promises of major investments in the US in the hope of both protection and peace. India is in high-level contacts with Iran and the Gulf states for the flow of its critical needs—oil and gas—and the well-being of the millions of Indians in the region.

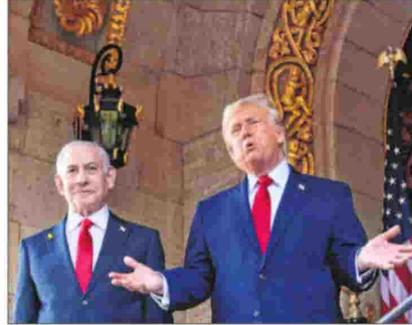
However, there appears to be some light for a deal with Iranian President Masoud Pezeshkian coming out with three conditions for stopping the war: recognition of Iran's rights, war compensation, and firm international guarantees against future aggression.

At the same time, a statement on behalf of Iran's new Supreme Leader, Mojtaba Khamenei, vows revenge and warns the Gulf states about hosting US bases. Defiant, as expected, it speaks of continuing to leverage the Straits of Hormuz, the key global oil waterway controlled by Iran. Can this leverage be leveraged, and Iranian oil become a pivot for a deal? This should not only interest President Trump but also possibly be the biggest motivator for him vis-a-vis Iran.

Of course, for both President Trump and Prime Minister Netanyahu, there are personal issues surrounding the war—for the former, distraction from the Epstein matter, and for the latter, keeping at bay the corruption charges that he may face out of office. There are also issues of legacy for both, and, of course, domestic politics in the US, which has always allowed Israel much leverage and has been particularly well used by President Trump.

President Trump has often invoked the Venezuelan parallel in Iran and noted the US control of its oil. Again, while earlier having spoken of freeing the Iranians from their theocratic government, now articulations speak of a change from within the Iranian establishment, though, of course, there has to be, and is, a stated unhappiness with their choice of a new Supreme Leader, the son of the previous Supreme Leader.

Let us go back in history. Trump 1.0 is known for his withdrawing the



The War With Iran: With the war escalating with each passing day, casualties on all the three countries involved—the US, Israel, and Iran—have been enormous. As for the rest of the world, the repercussions are being felt both economically and socially.

US from the Paris Agreement on climate change and the JCPOA, the nuclear deal between the P5 and Germany with Iran that eased sanctions on the latter in return for restricting its uranium enrichment to only civil use levels. The oil connection in the two is worth noting—the US was freed from taking on (even voluntarily) obligations to restrict the use of fossil fuels, including oil, and a stranglehold on major oil exporter Iran was reintroduced. And, in the Middle East, the Abraham Accords helped build Israel's ties with several in the Arab world, especially the oil-rich UAE. Western sanctions on Iran, over

This emphasis on oil and its control fits in President Trump's world view that oil is critical to prosperity and power and, hence, the US must control it. Interestingly, while the US strikes have hit several targets in Iran, oil installations have been kept out, and one Israeli strike on these, reportedly, drew a frown from across the Atlantic. Also, while boots on the ground in general in Iran doesn't appear to be on the mind of the US, there are indications of such an action being contemplated for Kharg Island, a tiny speck in the Persian Gulf from where Iranian oil is shipped. Oil prices also have huge domestic ramifications in the US, as seen by the most recent action of the administration of a 30-day sanctions waiver for all countries to buy Russian oil, no matter the unhappiness of Ukraine and the Europeans on this pass for Russia.

Iran going nuclear and developing intercontinental missiles has been stated as an existential threat not only to Israel but also to international peace and security. Any deal must, therefore, include Iran accepting acceptable restrictions on its nuclear and other offensive capacities, but oil appears the real sweetener for a deal with Iran. Policy analysts will find the necessary national security imperatives for such an action, no matter if it is essentially being driven by President Trump's instincts.

The writer is former Ambassador of India to Nepal.

Gold-Nifty Alarm: Why India's stock market might be the deal of the decade

A record-high Gold-Nifty Ratio signals extreme market fear, pointing to a rare and potentially attractive entry point for Indian equities despite strong economic fundamentals



Guest Column

PROF. GANESH KAWADIA

In February 2026, the Indian financial market presented a striking paradox: Gold surged to an all-time high of nearly ₹1,60,000 per 10 grams, while the main stock index, the Nifty 50, remained subdued, barely holding above the 25,600 level. While often viewed as a simple story of gold rallying on global fear, a deeper analysis reveals that the forces pushing gold to record highs are, by a clear historical pattern, simultaneously creating one of the most compelling and discounted entry points for Indian equities in recent memory.

READING THE FEAR GAUGE
To understand this, we use the Gold-Nifty Ratio—a simple yet powerful tool for measuring the stress level of the market, calculated by dividing the gold price (per 10g) by the Nifty 50 level. A low ratio indicates high investor confidence and expensive stocks, while a high ratio signals market fear and cheap stocks. Today, this critical ratio stands at an unprecedented 6.24. This is the highest figure ever recorded in history, marginally above the ratio of 6.00 seen at the absolute

darkest moment of the 2008–09 global financial crisis.

The Gold-Nifty Ratio suggests that Indian equities are currently priced

Market Event	Gold (₹/10g)	Nifty	Ratio
Crisis Bottom (2009)	₹15,000	2,500	6.00
COVID Crash (2020)	₹42,000	7,610	5.52
Today (Feb 2026)	₹1,59,900	25,640	6.24

as if the economy is in free fall. This perception is in sharp contrast to the underlying reality, where India's GDP grew at a robust 8.2% in the second quarter of the financial year 2026. This gap between overwhelming market fear and strong economic reality is unusually wide.

TWO MORE METRICS CONFIRM THE OPPORTUNITY: The Gold-Nifty Ratio is not the only indicator sending this signal. Two other respected metrics support the narrative of undervaluation:

The Nifty P/E Ratio: Standing at 22.5, this figure places the market in the 34th percentile of its 10-year history. This means that 66% of the time over the past decade, Indian stocks have been more expensive than they are right now, directly contradicting the widely held view of bubble-like

valuations. The Buffett Indicator: In this metric, comparing total market capitalisation to GDP, stands at 128.78%, it is

significantly below its recent peak of 152%. Crucially, India's rapidly expanding GDP means the denominator in the calculation is growing fast, improving the ratio over time—a powerful sign of fundamental, non-speculative health in the economy.

FH SELLING: THE OPPORTUNITY INSIDE THE DRAG:

The primary force keeping the Nifty subdued—rising only 8–9% in 2025 compared to gold's 75–80% surge—has been the consistent selling by Foreign Institutional Investors (FIIs). Their flight is driven by two main factors: a redirection of capital toward the tempting, AI-driven technology boom in the US, and a retreat from risk assets due to escalating Middle East tensions. When the Gold-Nifty Ratio peaked at comparable levels in the past, the Nifty

subsequently delivered average returns of +15.1% over three months; +28.9% over six months and +31.9% over twelve months in a majority of instances. The current situation is not a fundamental crisis: it is a temporary capital flight that has historically offered the sharpest equity recoveries.

INDIA'S UNDERLYING STRENGTH: The current market fear is completely divorced from the impressive underlying economic reality. India is not an economy in distress. The domestic story is one of structural strength: High Growth Engine: GDP growth consistently exceeds 7%, cementing India's position as one of the fastest-growing major economies globally. Expanding Consumption: Domestic consumption is expanding steadily, driven by a growing, aspirational middle class.

Infrastructure Leap: A massive, multi-year infrastructure build-out is accelerating across the nation, creating long-term economic capacity and boosting job creation.

Demographic Dividend: India possesses a large, young workforce that is entering its peak productive

years—a powerful long-term economic tailwind.

THE SMART STRATEGY: HOLD BOTH: Does this mean selling gold? Absolutely not. Gold's 14.8-fold rise since 2008 reflects a permanent repricing of risk embedded in the global financial system. The smarter position is a complementary allocation: Gold and silver for defence against global disorder and currency deprecation, and Indian equities for offence—a direct claim on one of the world's most resilient growth stories. The Gold-Nifty Ratio, currently at 6.24, is flashing its clearest signal since the 2008 crisis: the systemic fear embedded in Indian equities is over-priced. For those who can look beyond the present anxiety, precious metals are indicating a genuine window of historic investment opportunity.

The writer is a distinguished economist and former Head of the School of Economics at Devi Ahilya University (DAV), Indore. An expert in fiscal policy and regional equity, he has published extensive research on Madhya Pradesh's economic growth, tax mobilization, and fiscal consolidation.

LETTERS TO THE EDITOR

Complaint Redressal

Citizen grievances routed through the CPGRAMS portal often remain unresolved despite reaching the highest offices. Without deadlines and accountability, such platforms risk becoming ineffective. Each complaint should carry a mandatory resolution timeline and public tracking system. Transparency in grievance redressal is essential for restoring trust in governance.

K Chidanand Kumar, Bengaluru

War Responsibility

The ongoing global crisis has deepened tensions and insecurity. Many believe the actions of powerful nations have aggravated the situation and triggered wider conflict. Countries that value peace and stability must unite to counter aggression and restore balance. Collective global efforts

are essential to prevent escalating hostilities and safeguard international harmony.

Hema Hari Upadhyay, Khachrod

Economic Fallout

The conflict involving the US, Israel and Iran is already affecting global markets. Rising oil prices, currency fluctuations and disruptions to trade highlight how geopolitical tensions harm economies worldwide. Diplomatic solutions are urgently needed to stabilise markets and prevent further economic damage.

Saloni Rai, Ujjain

Safe Social Media

Blanket bans on social media for children may prove ineffective. Determined users will find ways around restrictions. A better approach is digital literacy education, age-based access controls and platform accountability. Parents and schools must

IndiGo Redefines Customers' Delight

IndiGo is the finest airline in the world. Which is precisely why we never take IndiGo for international travel. This week they treated passengers to a truly memorable aviation experience: a delightful Delhi-Manchester-Delhi joyride lasting thirteen hours without landing in Manchester. Passengers enjoyed uninterrupted sky views while the crew dutifully served food and beverages. The airline demonstrated exceptional capability in taking passengers for a ride quite literally. When the aircraft finally returned to Delhi, grateful passengers disembarked singing praise for the airline. Customer delight, redefined.

Dorai Ramani Maniam, Chennai

Diplomatic Balance

India's response to the West Asia oil crisis appears inconsistent. While condemning Iran's actions, New Delhi has remained silent on the role of other powers involved in the conflict. Such mixed signals could strain relations with Tehran, especially when India depends heavily on the Strait of Hormuz for energy



IndiGo is the finest airline in the world.

Class 8 textbook has sparked debate on academic freedom. While curriculum errors must be corrected, excessive judicial intervention may undermine educational autonomy. Courts should remain cautious so that decisions on academic content are guided primarily by scholars and educators.

Bal Govind, Noida

Judicial Overreach

The Supreme Court's decision to blacklist NCERT experts after the withdrawal of

supplies. Consistent diplomacy is crucial.

Rajakumar Arulnandham, Tirunelveli

Postpone IPL

The IPL scheduled to begin on March 28 should be postponed due to the ongoing West Asia conflict. International players may face travel disruptions and prefer to remain with their families during uncertain times. With global tensions rising and innocent lives lost daily, hosting a celebratory sporting event may appear insensitive.

S.N. Kabra

Unfair Remark

Michael Vaughan's remark describing South Africa as the "stupidest team" for defeating the West Indies in the T20 World Cup Super 6 stage was unnecessary. Teams play to win and uphold the spirit of the game, not to favour another side's qualification chances. Such comments from a senior cricketer undermine sportsmanship.

S. Sankaranarayanan, Chennai



DECCAN HERALD

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Detention revoked, questions unanswered

Sonom Wangchuk's unconditional release, after six months of preventive detention, raises questions about the validity of his detention and the limited application of citizens' rights in this case. The climate activist was detained in September 2025 for leading protests demanding statehood for Ladakh and constitutional safeguards for the region's fragile ecology and the rights of its indigenous population. He has been released, ostensibly to "restore" peace and conditions for dialogue. Wangchuk was held under the draconian National Security Act (NSA) on charges of leading an "anti-national" agitation, alleged Pakistani links, suspicious foreign visits, and "financial irregularities". These charges have now disappeared without explanation. That they were framed against a noted activist leading a peaceful agitation places similar charges raised against others under the scanner.

Wangchuk was released three days before the Supreme Court was to resume hearing on a habeas corpus petition filed by his wife. This raises the question of whether the administration acted to avoid releasing him after a court order. The Court, while examining the fairness of the detention procedures and the translations of Wangchuk's speeches to verify their "provocative" nature, had raised questions regarding the arrest. It also said the government may have read too much into his speeches. Considering the Court's observations and the seemingly arbitrary nature of the detention and release, the case appeared to be on weak ground. At the centre of the issue is a disturbing absence of procedural accountability that allows a person to be detained for six months and released without a credible explanation for the change in position. This sends out a worrying signal to the citizen; this reveals the ease with which arrests and releases can be made, without the court or the accused being allowed an opportunity to conclusively test the veracity of the charges. It is also worth noting that prolonged proceedings in the Court deferred justice in a case that involved a citizen's right to life and liberty.

The Sonam Wangchuk case exposes gaps in procedural accountability and threats to civil liberties

Wangchuk's release does not mark the end of the case or render the underlying issues irrelevant. Though the petition is technically infructuous now, the case is yet to be decided. The Court has previously held that release does not automatically end a case of illegal detention and has ordered compensation to the detainees. It should define Wangchuk's detention in clear judicial terms. The Court's position in this case should ensure safeguards against unlawful detention and deter governments from initiating processes that cannot stand legal scrutiny.

Airport push must pass viability test

The renewed push to build an airport in Ballari has again brought to the fore a familiar dilemma in infrastructure planning: should such projects be guided by economic viability or by political optics? The discussion assumes urgency as the Karnataka government prepares to hold a meeting between Chief Minister Siddaramaiah and legislators from Ballari, Vijayanagara, and Koppal to explore the possibility of establishing a common airport for the region. The proposal deserves careful consideration, but it must not be reduced to a prestige contest among districts. Airports are among the most capital-intensive public infrastructure projects. Once built, they demand continuous expenditure on maintenance, security, and navigation systems. If passenger demand is weak, such facilities quickly turn into white elephants.

Unfortunately, the experience of India's regional aviation programme offers ample evidence of this risk. The UDAN Scheme was launched to democratise air travel by connecting smaller cities. While it brought nearly a hundred airports onto the aviation map, many were reduced to silent terminals once the initial subsidy period ended. Under the scheme, airlines receive viability gap funding for only three years. When this support expires, carriers operating on thin margins often withdraw from routes that cannot sustain commercial operations. Across the country, several airports built with great fanfare now see little or no traffic. The pattern is visible even in Karnataka. Airports in Mysuru and Shivamogga handle just a handful of services, while Kalaburagi has struggled to maintain consistent connectivity. These examples highlight that airports cannot thrive merely because they are built; they survive only when passenger demand justifies their existence. This is why the suggestion of creating a single, strategically located airport to serve Ballari, Vijayanagara, and Koppal merits attention. A consolidated regional hub, accessible to neighbouring districts and even parts of Andhra Pradesh, would concentrate passenger traffic and improve the chances of commercial sustainability. Building airports for each district may satisfy local pride, but it risks repeating the costly mistakes seen elsewhere.

The Karnataka government's proposal to extend the subsidy framework and develop its own civil aviation policy is welcome. However, policy reform alone will not suffice unless infrastructure decisions are grounded firmly in rigorous feasibility studies. Many airports have been built in places where road and rail connectivity are excellent, making air travel an unnecessary and more expensive option. Infrastructure must serve people, not political symbolism. Airports will truly take flight only when they are economic gateways that sustain connectivity and growth. They must be built on viability, not vanity.

Passenger demand and economic sustainability should shape the Ballari airport proposal

Strategic interests steer international diplomacy, but safe silences must not legitimise US transgressions in West Asia

PRASENJIT CHOWDHURY

Just at a time we are about to mourn that Prime Minister Narendra Modi missed a shot at global recognition by not making use of his friendship with the United States President Donald Trump and Israeli Prime Minister Benjamin Netanyahu — often expressed in intimate forms of hugging, hand-holding, and other chummy ways — to stop the raging war in West Asia, here comes a small window. Frankly, no one can seriously believe that the PM, acting as a peace broker, would get a leveler to get even with Trump, proclaiming for the umpteenth time that he stopped a nuclear war between India and Pakistan.

Two weeks into the war, experts believe Modi can play a role. "To stop the US-Israel-India war, we need an intermediary, and preferably, the Prime Minister of India, Narendra Modi," Colonel Douglas MacGregor, a retired US military official, said in a podcast with Tucker Carlson. The UAE's former envoy to India, Hussain Hassan Mirza, in an interview with *India Today TV*, suggested that Modi was the best person to help end the war. "PM Modi has good relations with Iran and Israel. India is not involved in this war in any way. India is a neutral state and the only neutral state that is growing in stature, power, and influence," Colonel MacGregor said. To show the world that India is not anyone's stooge, and to give mettle to its stance of strategic autonomy, and its apparent neutrality, it is time for the PM to act.

The cannot act based on the imperatives of strategic autonomy — even if those transgressions include kidnapping a head of state as in Venezuela, or assassinating the top religious leader of a sovereign nation as in Iran — then symbolic optics of gratuitous intimacy become meaningless. Such optics often create an illusion of statesmanship for a leader who has the wherewithal to stop a war. While the tragic truth of international diplomacy is that we are all bound by a complex web of strategic interests and mutual misdeeds, we cannot turn a

blind eye to the consequences of a long list of US actions in West Asia: killing innocent schoolchildren; the sinking of an Iranian ship; unending bombing of the Iraqi people; support to despotic regimes; and pandering to the military whims of a nation, destroying many.

To be fair, India criticised Iran in the IAEA and the Security Council for its lack of cooperation with international powers to reveal the exact extent of its nuclear capability. Many in India exhorted Iran to improve upon the "credibility problem" that its years of "clandestine proliferation efforts..." created for it in Europe and the West, from 2003 to 2015. Both the Indian political class and security establishment



pitched for a diplomatic solution to Iran's nuclear crisis within the framework of the non-proliferation regime, even though New Delhi has always endorsed Iran's right to a peaceful nuclear programme within the NPT regime. It bears recalling that India's former external affairs minister, Natwar Singh, visited Tehran in September 2005 and was reported to have pledged support for Iran's peaceful nuclear energy programme.

While the US is consistent in its position that Iran must not be allowed to have nuclear weapons, it was Trump who pulled out of the Iranian nuclear deal in his first term. His positions are ambivalent; as far back as 2016, he held the view that the US should consider allowing Japan and South Korea to develop nuclear weapons, as this would enable Japan to deter China and South Korea to deter its northern counterpart, without the US spending a single cent. The Obama administration decided

against air strikes on Iran's nuclear facilities or launching a full-scale military attack, apprehensive that such action might trigger a war between Israel and Iran that would involve the US. It concluded that an American attack might cement solidarity among millions of Arabs, Sunnis and Shiites, causing them to side with Iran, rekindle the terrorist jihad, destroy the Israel-Palestine peace process (and whatever remnants are left of it), and end America's attempt to restore its global leadership role. The most telling assumption was that they would probably not stop Iran from developing nuclear weapons anyway.

The nuclear cover

Modi could tell Trump that he was as opposed to nuclear proliferation as much as nuclear apartheid, or that if attacking Iran to denuclearise it was legitimate, other nations with rogue credentials previously active in clandestine nuclear proliferation could also be made a fair target.

The trouble with nuclear weapons is that one wants to have them for the exact reason others want to prevent them. In 1963, the Kennedy administration was secretly fighting Israel's nuclear weapons development programme, contrary to what the Trump administration is doing. Trump has previously defended the strikes on Iran, likening them to decisive actions taken in World War II.

"I don't want to use an example of Hiroshima or Nagasaki... but that was essentially the same thing. That ended that war. This ended the war," he said, completely impervious to the deeper ramifications of his own statement pointing to why nations fight tooth and nail to put an end to nuclear apartheid and explaining why at various times in recent decades, four potential regional challengers to US interests in the region have sought nuclear weapons and ballistic missiles: Iraq, Iran, Libya, and Syria.

Now that the war is raging in full fury, the search must be on to find a middle ground between the neoconservatives for whom reality means a war against "Islamofascism," and the anti-Zionists who see Israel at the root of all evil in West Asia. The death of diplomacy is no less scary than the death of civilians.

(The writer is a Kolkata-based commentator on geopolitics, development and culture)

RIGHT IN THE MIDDLE

The myth of male courage

In the narrowest spaces of life, it is often women who move first and men who follow

PRIVAN NAIK

On a visit to Gokarna, I found myself in an unlikely company; an infantry colonel with decades of field service behind him, another companion who had retired after a long banking career and Praveena, the colonel's homemaker wife. Together we were to visit an ancient natural underground void, a slightly intimidating Gogarbiha Cave, formed from a rock around 150 million years old. Hindu mythology claimed, Lord Shiva emerged from the ear of a cow in this cave and therefore the name Gogarbiha.

The approach to the cave was deceptively serene. Coconut palms tilted lazily against the sky while shrubs and wild grass grew in the unlikelyst of places. Nothing had prepared us for the cave's entrance: a narrow, low slit in the rock that demanded physical concessions.

We had to bend low, almost bow, before entering.

All three men were past seventy. Age seemed at such moments though between us lay years of uniforms, offices, files and authority. The colonel examined the opening with practised assessment. Years in the infantry had trained him to read terrain, anticipate hazard, calculate movement. The cave offered little visibility, uneven footing and the unmistakable message of being claustrophobic inside.

I hesitated myself, but dressed the hesitation in intellectual curiosity. It is one thing to admire ascetics looking for 'moksha' in darkness; quite another to negotiate darkness with joints that no longer trust sudden movement. The retired banker, seasoned by decades of weighing risk against return, regarded the aperture with similar sobriety. Prudence is a habit that does not retire easily.

Praveena, stood quietly besides. For decades she had followed the unpredictable rhythms of army life, packing up homes at short notice, managing long absences, raising kids across unfamiliar towns. Her courage had never required an audience. The cave did not appear to

her as an obstacle but as an adventure. Without fuss, she slipped off her sandals and moved forward. No proclamation, no challenge, just a decision. In that small act was a lifetime of unadvised strength.

We remained outside.

The colonel, who had once led men through far harsher uncertainties, adopted an air of dignified watchfulness. The banker studied the rocks as though assessing an accounting statement. I found myself absorbed in the play of grass and shadow, as if research would compensate for not entering the cave.

When Praveena emerged, there was no triumph in her expression, only composure. Inside she said, the air was cool and skylight emerged through an opening in the roof. There were three meditating foreigners, all silent and in immobile postures. One of them offered her a lamp to study the walls and the low ceiling.

As we left for our car park, the colonel resumed command of the open path, the banker returned to his calculations, me the writer to metaphor. But the cave had delivered an unmistakable verdict. In the narrowest spaces of life, it is often women who move first and men who follow.

LETTERS TO THE EDITOR

State govt must act fast, start recruitment process

The article 'Hiring challenge as 86k govt employees to retire by 2030' (Mar 17), points to lack of manpower planning by the state government. The recruitment process needs to be a continuous one and not allow huge backlog. Any attempt to clear this backlog by mass recruitment drive at a later date means otherwise eligible candidates would become ineligible due to age

factor. Another factor affecting timely recruitment is the reservation policy, which appears to be an eternal problem. Further, quoting financial burden for not filling up vacancies defies logic as these posts are meant for providing public service. The government must revisit the issue and start the recruitment process soon.

H V Bhatta, Bengaluru

Bar criminals from ballot

The ADR report on West Bengal's legislators is a grim reminder of the criminalisation of politics. With 47% of MLAs facing criminal cases and 37% accused of serious offenses like murder and rape, India's democracy is being held hostage by muscle and money power. The judiciary must move beyond mere disclosure mandates. It is time for the Supreme Court to direct a permanent ban on candidates with framed charges for heinous crimes, rather than waiting for convictions that take decades. To safeguard the 2026 elections across

four states and a UT, we need fast-track courts for lawmakers and a legal mechanism to de-recognise parties that repeatedly field history-sheeters. Justice must precede the vote.

Vijaykumar H K, Bengaluru

Content is still the king

Recent Pan-India dreams and Kannada cinema realities' (Mar 15), the analysis reveals a rather dismal picture of Kannada cinema, where few films succeed at the box office. There was a time when parallel cinema ruled the roost, with directors like Puttanna Kanagal, Girish Kasaravali,

and P Seshadri producing works often based on best-selling novels. Audience tastes changed, and action-oriented films with water-thin storylines became popular. The pan-India craze led producers to make big-budget films for a wider audience. The advent of VFX and AI has the potential to transform cinema, but a good storyline, screenplay, and direction are essential for success.

C V Aravind, Bengaluru

Our readers are welcome to email letters to: letters@deccanherald.com (only letters emailed — not handwritten — will be accepted). All letters must carry the sender's postal address and phone number.

SPEAK OUT



We have transformed from 'politics of vote-bank' to 'politics of performance'.

Ashwini Vaishnav,
Union Minister

Perhaps the less we have, the more we are required to brag.

John Steinbeck

TO BE PRECISE

WE ARE THE REAL ROGUE NATION HANDS OFF OUR TITLE!

SCOTTIE KUMAR



IN PERSPECTIVE

A stress test for Karnataka's finances

The Fiscal Health Index underlines strain from debt concerns and a rise in welfare and committed expenditure

ANANTHA RAMU M R

The NITI Aayog's Fiscal Health Index serves as a framework to assess and compare the fiscal performance of Indian states. Conceived primarily to evaluate the fiscal soundness of the states, the Index also guides reforms and encourages evidence-based policymaking.

Major sub-indices considered are the quality of expenditure, revenue mobilisation, fiscal prudence, debt index, and debt sustainability. The indices are constructed separately for major states, north-eastern states, and Himalayan states. States are ranked and categorised as aspirants, performers, frontrunners, and achievers.

The Index for 2023-24, released recently, places Karnataka in 9th place among 18 major states, with a score of 41.7 out of 100. It is classified under the category of frontrunners. Uttar Pradesh, Gujarat, Maharashtra, and Telangana are the other states in this category. Odisha was ranked 1st in the Index, with a score of 73.1. It held the top spot in the previous year (2022-23) as well. Among the major states, Punjab, with a score of 12.4, is at the bottom of the list. Joining Punjab in the aspirant category, among the major states, are Kerala, Andhra Pradesh, and West Bengal.

Karnataka's rank has improved from 10th in 2022-23. However, this position could be seen as surprising, considering its stature as a fiscally disciplined state. Karnataka was the first state to enact and implement a fiscal responsibility act of its own in 2002, even before the Union government enacted its Fiscal Responsibility and Budget Management (FRBM) Act in 2003. The fiscal responsibility legislation for the states mandates the states to keep their fiscal deficit below 3% of the Gross State Domestic Product (GSDP), to eliminate revenue deficit, and to maintain their public debt below 25% of the GSDP.

Fiscal deficit is the difference between total expenditure and total revenue, while revenue deficit denotes the difference between revenue expenditure and revenue receipts. Laws governing the fiscal policies of states affirm the golden rule of public finance — borrowings shall be spent on the formation of capital.

Karnataka has been a frontrunner in adhering to the fiscal consolidation roadmap since 2005-06. The state has reported a surplus in the revenue account for many years

after it enacted the fiscal responsibility act until the Covid-19 outbreak in 2019-20.

So what, really, is pushing down Karnataka's rank in the Fiscal Health Index? Of the sub-indices the NITI Aayog considered, public debt sustainability is a parameter that has dragged down the state's scores. Debt sustainability evaluates a state's long-term ability to service debt without creating fiscal stress. The indicator the NITI Aayog used to measure debt sustainability is the difference between the growth rate of GDP and the growth rate of interest payments. If the growth rate of the economy is higher than the growth rate of the interest payments, the debt is seen as sustainable.

Funding the guarantees

Another crucial metric is fiscal prudence, which is measured by the fiscal deficit-GSDP ratio and the revenue deficit-GSDP ratio. States with lower ratios are considered fiscally prudent. The NITI Aayog reports that though Karnataka has shown gradual consolidation, it has successfully reducing the deficit post-pandemic, it has also been constrained by the rising welfare and committed expenditure. Added to this, a decline in the share of resources to the state, as per the recommendations of the 15th Finance Commission, when compared with the previous Finance Commission allocations, has also hindered efforts towards fiscal prudence.

Given recent trends of increased government expenditure owing to the guarantee programmes, the decline in Finance Commission transfers, reduction in GST revenue, etc., the state's Fiscal Health Index may show a downward trend for 2024-25 and 2025-26. However, there is a positive takeaway from the marginally higher devolution from 2025-27, as per the 16th Finance Commission recommendations.

The state government's efforts to improve mobilisation of excise duty through structural reforms, such as the introduction of Alcohol-in-Beverage (AIB)-based taxation from April 2026, may prove crucial on the road to improved fiscal health. In addition, as presented in the State Budget 2026-27, Karnataka is set to pursue what it calls the '1IG Economic Model', which envisions a balance between public expenditure on welfare programmes and the formation of capital. This model balances allocations between social and economic sectors.

Karnataka cannot afford to compromise its overall fiscal health. Given the pressure on rising expenditure, the state must mobilise concerted efforts to optimise its revenue potential.

(The writer is an assistant professor in the School of Social Sciences, MS Ramaiah University of Applied Sciences)

At WTO, India can use strategic trade-off to break the PSH deadlock

ANWAR HUSSAIN SHAIK

India's long-standing priority at the World Trade Organisation has been securing a permanent solution to the public stockholding (PSH)—a policy that allows governments to procure and stockpile food grains for food security and price support without breaching WTO subsidy limits. This demand remains vital for protecting procurement programmes that sustain hundreds of millions of poor farmers and consumers. Yet developed members have shown little urgency on this issue. The current focus of most members is instead on integrating the Investment Facilitation for Development (IFD) Agreement into the WTO framework.

As the 14th WTO Ministerial Conference (MC14) in Yaoundé (March 26-29) approaches, pressure is expected to intensify—especially if South Africa softens its stance—potentially isolating India.

Rather than resisting alone, India could reshape the negotiating dynamic through

a strategic trade-off: remove its objection to incorporating the IFD Agreement in exchange for a permanent PSH solution. This approach is not unprecedented. At the 2013 Bali Ministerial and its follow-up General Council meeting in Geneva in 2014, India secured the first "peace clause" on food security by allowing consensus on the Trade Facilitation Agreement. A similar bargain at MC14 could convert mounting pressure into negotiating leverage, aligning India's food security imperative with the investment priorities of developed members.

To appreciate this interplay, let us understand how negotiations and decisions take place in the WTO and what has set "investment" apart from other discussions.

Although trade and investment both drive economic development, they are regulated differently. Trade is governed by WTO and free trade agreement commitments, while investment is handled through domestic laws and international investment agreements outside the WTO.

Unlike traded goods, investments maintain ongoing ties to their origin, and entering into an investment treaty affects policy space and sovereignty in host countries.

In the WTO, decisions are taken by consensus at Ministerial Conferences and the General Council. New multilateral agreements become Annex I documents. Plurilateral agreements listed in Annex 4 bind only participating members and create no obligations for non-participating members. Adding agreements to either annex requires the consensus of the entire membership.

Investment debates at the WTO began at the 1986 Singapore Ministerial, where "trade and investment" was introduced. India and other developing countries opposed it, citing sovereignty concerns. In July 2004, members agreed to negotiate trade facilitation but explicitly ruled out investment talks, creating a clear negative mandate.

However, in 2017, some members tried to bring investment back, but India

blocked it. Subsequently, these members discussed it outside the WTO's formal negotiating mandate and proposed the finalised IFD Agreement for incorporation as an Annex 4 document at MC13 in 2024 in Abu Dhabi. India and South Africa blocked this proposal, arguing that the IFD initiative reintroduces investment through a "procedural backdoor".

Proponents argue that the IFD text excludes contentious commitments of market access and investor-State dispute settlement (ISDS) and extends MFN to non-participants as well. Critics, however, contend that commitments to administrative processes can render market access. The so-called firewall to keep out ISDS disputes is a one-way valve. Investors can always invoke ISDS under their respective IIAs using the Fair and Equitable Treatment (FET) clause.

The MFN treatment, though extended to non-participants in Article 5, is negated by the footnote. Finally, the IFD Agreement can be amended by a two-third ma-

majority, meaning all contentious issues kept outside can be brought back later.

Facilitation improves the flow of foreign direct investment. However, then for an international treaty is suspect. Unlike trade agreements, in which exporting countries seek assurances of market access through treaties, in the investment space, it is in the interests of IFD-seeking countries to facilitate, for which there is no need for an international treaty commitment.

Legal and systemic implications: The proponents are seeking to incorporate IFD into the WTO under Article X of the Marrakesh Agreement. Article X9 provides for the addition of a trade agreement to Annex 4, which should be by consensus. IFD, however, is not a trade agreement. Additionally, IFD is not a treaty under the Vienna Convention on the Law of Treaties (VCLT).

Systemically, IFD raises concerns about the erosion of the WTO's multilateral mandate, which operates on a consensus-based decision-making model—introducing IFD through such pluralist

initiatives risks eroding this foundation, particularly given the WTO's prior negative stance on investment. It will also set a precedent, which is illegal. Further, it will renege asymmetrical bargaining power at the WTO between powerful and smaller developing and LDC members.

Strategic implications for India: Geopolitically, the IFD is dominated by China with 99 of the 128 IFD participants also being members of China's Belt and Road Initiative (BRI). IFD is a strategic tool for China to secure its global investment footprint and "String of Pearls" strategy under a multilateral shield of the WTO.

Notwithstanding the implications, India can avoid potential isolation by allowing consensus on the incorporation of the IFD Agreement in exchange for a permanent solution to the Public Stock Programmes of developing countries for their food security.

(The writer is a former chairman of the Technical Barriers to Trade Committee of the WTO and was a director in the Department of Economic Affairs)

Even though women contribute to a household's income, their labour, both paid and unpaid, and their individuality are constantly devalued. For equitable development, the definition of progress should consider their empowerment

DIVYASHREE K

In Devadurga, a taluk in Raichur district, Karnataka, the sun rises slowly over fields. The dusty main road near the bus stand fills gradually with bikes and tractors, and tea stalls begin to hum with conversations.

Gauri's day, however, begins long before the rooster crows. At around 4.30 am, when it is still dark outside, she moves quietly across the mud floor, taking care not to disturb the others. In a small kitchen beside the storeroom, she lights the stove and begins preparing the food while attending to other household duties. The scraping of utensils and the hiss of the fire mark the first hours of her day.

Once the household is in motion, the next layer of labour begins for Gauri. Tying the end of her sari, she picks up her bag and walks toward the fields beyond the canal bank for the day's work. While working in the field, when the days stretch under a harsh, oppressive sun, backs bend and fingers move constantly. Still, stopping is not an option. If she doesn't go to the field, the work will continue, but her income will fall.

By evening, she returns from the fields with dust on her feet and aches in her limbs. Nevertheless, the day does not end for her; it merely shifts indoors. Dinner needs to be cooked, water fetched, the elders attended to, and the children fed. Gauri eats last, often in silence, and goes to sleep knowing the same routine will repeat at dawn.

The daily schedule does not look very different for Savitri, who works for the National Rural Livelihood Mission (NRLM). Long before her paid labour begins, her day starts at 5 am with cooking, cleaning, fetching water, and caring for her family's cows. From 1 pm, she returns home to perform additional household chores, after which she steps out for survey work linked to NRLM. She returns home at 7 pm to cook for the family, eating only after 9 pm.

Lakshmi works as a driver for the Swachh Bharat Mission (SBM) vehicle, collecting solid waste from the villages. However, much like Gauri and Savitri, her day too begins much earlier, at least three hours before her official duty starts at 7 am. After her work as the SBM driver, she starts her second job at a nursery, caring for plants. At 6 pm, she returns home to look after other household activities. She uses a brief window between cooking and eating to get some rest and catch up on her favourite television serials.

Shanta and Kamala, who work as a teacher and a tailor, respectively, have similar work schedules. All these women work almost continuously, with no clear breaks; only transitions between different kinds of paid and unpaid labour.



A woman manually harvesting rice with a sickle. Women work almost continuously, with no clear breaks; only transitions between different kinds of paid and unpaid labour. NANDITHA COGATE

Unpaid, unseen, unending: The workdays of rural women

by unpaid domestic labour that begins before sunrise and extends well after sunset.

The routine of these women is not an outlier; it is a reality that many women face, not only in Devadurga but across many rural areas, where their domestic labour remains unpaid, unnamed, and largely invisible. Cooking, cleaning, and caring are often viewed as a woman's duty, rather than something valuable in its own right. Across India, time-use surveys reveal how deeply gendered this pattern is. According to the Ministry of Statistics and Programme Implementation (2020), women spend an average of 289 minutes per day on unpaid domestic work, compared to 88 minutes spent by men.

The privilege of rest

When people speak of "work," they usually refer to labour that is both public and paid; and most often, men's labour is tied to fieldwork, market activity, or seasonal agricultural cycles. Furthermore, it is believed they exert significant effort in the form of physical labour, and confront economic uncertainty and seasonal risks.

By contrast, even though women also work for long hours, and their contribution adds to the family's income, they have neither ownership over it, nor control over its allocation. It is men who discuss purchas-

es, savings, household expenditures, and farm-related investments.

This devaluation of women's labour, both paid and unpaid, impacts how society treats their time, mobility, and right to rest. Men wake later in the morning and begin their day only when agricultural or wage-based work is scheduled. When those tasks are completed, or when there is no immediate work available, men commonly spend time in public spaces, sitting at tea stalls, resting near road-side platforms, discussing politics or farming, or playing informal games. Rest, for them, is considered a natural pause after an effort; something earned, not questioned.

For women, contrastingly, the work is continuous and rarely time-bound. Domestic responsibilities, caregiving, and agricultural labour overlap considerably, existing in a cycle with no identifiable breaks. This imbalance becomes even more pronounced during peak agricultural seasons, when women, after working long hours under intense sunlight in the fields and carrying loads, return home to continue household labour.

Even when women are physically worn out, rest is not readily available. For them, sitting outside, socialising, or pausing in public spaces is often viewed as inappropriate or indulgent. A resting woman may

be judged as careless, lazy, or neglectful of her responsibilities.

This privilege of rest reveals something deeper: the inequality is not about how much work is done, but about who is doing the work. It reflects a deeper hierarchy of whose time is more valuable; whose exhaustion is acknowledged; and whose body is allowed relief.

Even as conversations around development intensify, and even as we embark on programmes on water security, climate resilience, and agricultural prosperity, there are some crucial questions that should be considered when defining "progress": is the burden of invisible labour being reduced? Are the efforts of Gauri, Savitri, Lakshmi, Shanta, and Kamala being recognised? Are they being empowered in any manner? The pathways of development we imagine for Raichur must integrate these perspectives. Ignoring these would result in resilience and development being founded on skewed or flawed ideas.

"Gauri is an amalgamation of multiple women the writer interacted with and observed. The names have been changed to protect identities."

(The writer is a research associate at WELL Labs, a water systems transformation centre based in Bengaluru)

different occupations, one shared reality

To an outsider, the lives of these women might appear different, after all, what commonality can an NRLM worker, a driver, a teacher, a tailor, and a daily labourer possibly have? However, this dissimilarity is only superficial. The daily schedules of these women follow an almost identical pattern: paid work is invariably bookended

OUR PAGES OF HISTORY

50 YEARS AGO: MARCH 1976

Bid to ascertain CIA hand in dynamites case

New Delhi, March 17
Home Minister K. Brahmananda Reddy told the Rajya Sabha today that the question whether the United States' Central Intelligence Agency had a hand in the case pertaining to the discovery of dynamites in Bangalore on the midnight of March 9 would also be looked into during the investigation. He said the CBI was assisting the local authorities in the investigation. However, he did not rule out the possibility of the CBI itself taking over the investigation at a later stage if necessary.

25 YEARS AGO: MARCH 2001

Congveers round to coalition idea

Bangalore, March 17
Shifting its stand on the issue of coalition as decided at the Pachmarhi session in 1998, the Congress today announced its readiness to enter into a coalition arrangement with secular parties as part of an electoral alliance in the wake of the present political scenario at the Centre. The Congress, in its draft 3-page political resolution, made it clear that it was ready for appropriate electoral or coalition arrangements with secular parties. However, the party said it was not ready to compromise its basic ideology.

OASIS | MOHAMMED TALHA SIDDI BAPA

Ramadan: A time for self-audit, shared humanity

Just before dawn, across continents and time zones, kitchen lights flicker on. In quiet homes, a simple meal is shared and a final sip of water is taken. With sunrise, millions begin a fast that lasts until sunset.

To an outside observer, Ramadan may appear to be about abstaining from food and drink. For Muslims, however, it is something deeper: an annual exercise in self-examination, discipline and moral recalibration—a month that invites believers to pause, reflect and reset. In a world shaped by speed, consumption and constant stimulation, Ramadan proposes restraint.

Modern life rarely encourages self-audit. Success is measured outwardly—by income, visibility and productivity. Ramadan reverses that direction, turning attention inward. Fasting is not simply a physical act; it is a voluntary discipline sustained by personal conviction. No authority monitors it, no state enforces it.

The fast quietly asks difficult questions: How do we speak when irritated? How do we respond to anger? Do we exaggerate, gossip or exploit? In that sense, Ramadan functions like a yearly review of character. Hunger and thirst slow impulse and make appetite visible. And in making appetite visible, they make choice visible.

If fasting is the practice of Ramadan, the *Qur'an* forms its ethical framework. Beyond its theological significance, the *Qur'an* is approached—especially during Ramadan—as a guide to personal development.

Its recurring themes are not abstract metaphysical alone. They speak of honesty in trade, fairness in judgment, restraint in anger and care for the vulnerable and accountability before a higher moral authority.

Many Muslims read the *Qur'an* more attentively during this month, not merely for recitation but for reflection: What kind of person am I becoming? Where have I been unjust?

Whom have I neglected? These questions extend beyond religious identity. They belong to the universal vocabulary of ethical growth. Fasting also has a psychological dimension. Hunger softens certainty and reminds one of vulnerability. Though the fast is temporary, the experience often deepens empathy for those who live with deprivation year-round.

As a result, Ramadan is marked by increased acts of charity and generosity—from organised giving to quiet acts of helping others. For those who observe it, Ramadan is a celebration of revelation and an opportunity for inner renewal. For those who do not, it still poses a question: what governs our lives—impulse or conscience?

What should students learn in the age of AI?

UPASHA KUMARI

For centuries, education systems were built on a simple assumption: knowledge was scarce. Teachers, textbooks, and libraries were the primary gateways to information. Classrooms, therefore, focused on transmitting knowledge, often through memorisation, repetition, and standardised testing.

Artificial intelligence is quietly dismantling that model.

Today, a student can generate an essay, summarise complex readings, solve mathematical problems, or receive explanations on nearly any topic within seconds. The central question confronting educators is no longer whether students have access to information. They do, more abundantly than any generation before them. The deeper question is what it now means to be educated in a world where information is instantly available.

The distinction between information and understanding has become central to the purpose of schooling. Many traditional assignments—structured essays, textbook summaries, and formulaic answers—are precisely the tasks AI systems can now perform with ease. Attempting to ban these technologies is unlikely to succeed. Technology has always reshaped learning environments, and AI will be no different.

Instead, AI exposes a deeper issue: much of schooling still rewards the reproduction of information rather than the cultivation of thought.

This moment calls for a rethinking of learning itself. If machines can generate answers, schools must focus on forms of thinking that cannot be automated. Dialogue, interpretation, imagination, and judgment become central. Oral examinations, debates, collaborative inquiry, and project-based learning may become far more meaningful indicators of understanding than standardised essays.

Teachers are already encountering this shift. A student who once struggled to structure an essay can now generate one in seconds. The challenge is no longer detecting AI, but designing tasks where thinking cannot be outsourced. Asking students to defend arguments, reflect on personal experiences, or interpret contemporary events through theoretical frameworks demands engagement that automated systems cannot fully replicate.

Paradoxically, AI may compel education systems to rediscover creativity and critical pedagogy. In *Creativity and Critical Pedagogy in Education*, co-authored

with Professor Arpan Yagnik of Pennsylvania State University, we argue that creativity in education cannot be reduced to individual originality or isolated innovation. It must be understood within broader social, cultural, and political contexts. Classrooms should not simply produce efficient problem-solvers but also thoughtful individuals capable of questioning dominant narratives and imagining alternatives. AI makes this argument more urgent.

If machines can generate content, synthesise information, and replicate patterns of knowledge production, the uniquely human dimension of learning lies in the ability to interpret, critique, and reimagine the world. Creativity, in this sense, is not merely about producing new ideas but about cultivating the intellectual courage to challenge established frameworks.

This is also where the humanities regain relevance. Disciplines such as philosophy, history, literature, and political theory train students to grapple with ambiguity, ethical dilemmas, and competing perspectives—questions that no algorithm can answer conclusively.

In India, where schooling remains exam-centric and driven by memorisation, AI exposes the limitations of a system organised around information recall. When machines can reproduce information instantly, memorisation alone loses much of its value.

As policymakers debate the integration of AI into education, the conversation cannot remain limited to digital infrastructure. The deeper question is pedagogical. How should curricula, teacher training, and assessment evolve in a world where information is abundant but judgment remains scarce? The challenge before educators is not merely technological but philosophical. What kinds of thinkers should schools cultivate—individuals who can retrieve answers or citizens capable of exercising judgment in a complex world?

If classrooms are to adapt, teachers must be supported in navigating this transition. Teacher training still focuses on curriculum delivery and assessment compliance rather than on inquiry-driven learning. Teachers must guide students in interpreting information, questioning automated outputs, and developing judgment. Preparing educators for this shift will be essential if AI is to strengthen learning rather than merely accelerate information consumption.

(The writer is an education specialist, currently pursuing her PhD at Sharda University)



Indians became voters before they were citizens—by the time the Constitution came into force, the abstract notion of universal franchise and electoral democracy were already grounded

Omnit Shani

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

—Rammath Goenka

RISING TRADE DEFICIT, DEPENDENCY ON CHINA CAUSES FOR CONCERN

THE good news is that India's merchandise trade deficit fell to \$27.1 billion in February from the previous month's \$34.7 billion. The bad news is that it has almost doubled over a year, from \$14.4 billion in February 2025. The gap widened because of a year-on-year spike in imports of almost a quarter to \$63.7 billion, led by gold, silver and electronics, while exports edged down by less than 1 percent to \$36.6 billion. The seemingly endless demand for gold drove up its imports by 218 percent to \$7.4 billion, while the increasing use of silver in industrial processes pushed up the white metal's imports to \$1.6 billion. Rising oil and gas imports, higher logistics costs and sluggish goods exports aggravated the imbalance.

Another major cause for concern is the ballooning trade deficit with China, which surged to \$102 billion during the period from April 2025 to February 2026, compared with \$91 billion in the same period the year before. Despite the focus on Make in India, Indian manufacturing appears heavily dependent on crucial raw materials and components, especially for electronics and pharmaceuticals. The flood of a wide variety of low-cost, good-quality consumer goods as well as industrial components from across the border has hurt local industry. Rather than erecting trade barriers, this dependence must be reversed through greater quality and price competitiveness.

The government is rightly worried that the overall trade imbalance may worsen before it improves. Officials see exporters facing demand slowdowns and logistical bottlenecks as the Gulf war widens. After all, West Asia absorbs about \$65 billion of Indian merchandise and services exports annually. Meanwhile, America's high tariff regime has affected exports to that market as well, which fell 12.8 percent from the previous February to \$6.9 billion this year. The interim trade deal announced with fanfare now appears likely to miss its March signing target, as agreements on non-tariff and security barriers remain pending. An aid package for exporters, reaching a final deal with the US and working towards an end to the Gulf crisis are among the government's immediate priorities. In the long term, the answer lies in finding newer markets for exports and greater indigenisation of critical inputs for strategic industries.

BEFORE MAKING IT A TECH HUB, BUILD MYSURU INFRA

CHIEF Minister Siddaramaiah has proposed to extend his plan of promoting technology investments in the smaller cities of Karnataka. In his 2026-27 budget, he has pitched Mysuru as the state's second IT City. The previous budget had promoted tech clusters in Belagavi and Dharwad; this time a new IT park has been planned for Mangaluru. This decentralisation of the IT industry is a practical solution to achieve more equitable growth across the state and to disburden the IT City's crumbling infrastructure. The state is also focusing on building more global capability centres, with a dedicated policy for the segment. While over 550 such centres are operational, it is targeting 500 new ones by 2029 to bring in an estimated 3.5 lakh fresh jobs.

Located 140 km from the state capital, Mysuru is a natural alternative as the next IT centre, with more than 30,000 employees already working for around 100 companies including established majors like Infosys as well as startups. The two cities are connected by an expressway, and new commuter and Vande Bharat trains that have shrunk travel time. There is also talk of extending Namma Metro in the future.

But while turning Mysuru into a tech centre is a welcome move, it is advisable that the government keeps in mind the ethos of the city. It is what Bengaluru was three decades ago—a pensioners' paradise with a laidback lifestyle. But it's also a city rich in history, heritage and culture, and a tourism and yoga hub that hosts the annual Dasara Festival. Mysuru is adjudged cleaner than Bengaluru on the Swachh Survekshan national cleanliness survey.

The budget announcement is bound to rev up the property market in and around the city which is still much more affordable than the state capital. Developers would have started hunting for space anticipating rising residential and commercial demand. The fear is that what happened to Bengaluru after the 2000s' IT revolution could befall Mysuru, too. A peaceful city could morph into a congested metro with dense traffic, unmanaged waste and unmonitored growth putting pressure on scarcer resources and infrastructure. While encouraging economic activity beyond the capital, the government should not export Bengaluru's ills to the City of Palaces. Instead, it should draw up and act on a master plan to build robust infrastructure before opening the doors to the next IT gold rush.

QUICK TAKE

DRESS FOR THE CLIMATE

SOME changes brought about by exigent circumstances should be allowed to stay. Asian countries are trying hard to lower energy demand in times of choked supplies. Sri Lanka is rationing fuel and keeping public institutions shut on Wednesdays. Myanmar is implementing a Delhi-like odd-even scheme for private cars, and the Philippines and Vietnam are advising some citizens to work from home. All these measures will be reversed when the supplies normalise again. But there's tropical wisdom in perpetuating what the Thai government is suggesting. To lower air conditioning demand, several Thai TV presenters recently took off their formal jackets during live broadcasts. Like the feminist Ku-Too movement in Japan, in which women are swapping high heels for comfortable footwear; there's reason enough to avoid stuffy Western wear rather than clinging on to tradition.

HIS Monday's bombardment of a rehabilitation centre in Kabul, which killed more than 400 people, is the latest confirmation of the fact that the *raison d'être* of the Pakistan army is to wage war—across its borders and within. Within a year, it has fought Afghans to the west, the Baloch people within, and Indians to the east. But its history of friction with India illustrates this in the sharpest manner possible.

Both Atal Bihari Vajpayee and Manmohan Singh sincerely wanted to break the cycle of hostility and violence that characterised India-Pakistan relations. The 1999 Lahore bus trip, when Prime Minister Vajpayee travelled on the first Delhi-Lahore bus service to meet his counterpart, Nawaz Sharif, was an overt overture to bury the hatchet. The Agra Summit of 2001 and the 'Srinagar handshake' of 2003, during which he extended his hand of friendship once more to Pakistan, despite the Kargil incursion in 1999 and the attack on the Indian Parliament in 2001, were generous attempts to strike new ground.

Manmohan Singh, too, believed in a paradigm shift in our relationship with Pakistan and in finding an administrative solution to the Kashmir issue. Speaking in Amritsar in 2006, he said, "Borders cannot be redrawn, but we can work towards making them irrelevant—towards making them just lines on a map. People on both sides of the Line of Control should be able to move more freely and trade with one another."

He established a backchannel of diplomacy with Ambassador Satish Kumar Lamba on the Indian side, speaking with Puzoshe Musharrarf's confidant Tariq Aziz. The rough contours of greater understanding were taking shape, involving a more porous border for free trade, a joint consultative mechanism, phased demilitarisation and greater self-governance in Kashmir on both sides of the border. Confidence building was the name of the game. As cabinet secretary, I too was involved in part, trying to oil the wheels of trade by speeding it up through faster customs facilitation and removing bottlenecks in train movements.

Then, with devastating effect, 26/11 struck. Just as the Kargil conflict had followed the Lahore bus diplomacy, the attack on the Indian Parliament followed the Agra Summit. When Narendra Modi became Prime Minister, he too endeavoured to build a new edifice of peace with Pakistan. He invited Nawaz Sharif to his swearing-in ceremony,

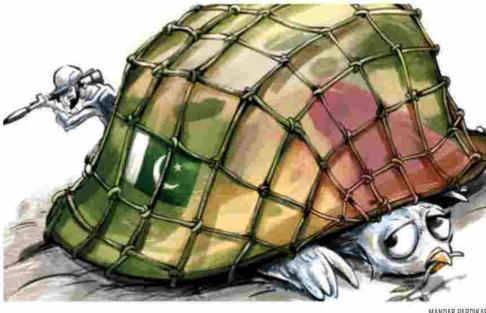
Pakistan has been called an army with a State, rather than the other way around. And history shows that its army wages war because it has to

THE ECONOMICS BEHIND PAKISTAN'S PERPETUAL HOSTILITY

K M CHANDRASEKHAR



Former Cabinet Secretary and author of *As Good as My Word: A Memoir*



MANDIR PRASAD

which the latter accepted. He met Sharif on the sidelines of two international meetings, and, most surprisingly of all, broke diplomatic protocol by flying to Pakistan on Christmas Day of 2015 to attend Nawaz Sharif's 66th birthday and celebration of his granddaughter's wedding at Raiwind. An unscheduled visit on his way back from official visits to Russia and Afghanistan. In a couple of weeks, the response came: vicious attacks on our air force base at Pathankot and on our army base at Uri.

The pattern is telling, even predictable attempts to make peace, followed immediately by violence emanating from Pakistan. I recall from my days in the commerce ministry that, for years on end, we did not file a dispute against Pakistan for failing to extend the most favoured nation treatment to us, as they

were required to under World Trade Organization rules. The effort was always to handle them with kid gloves in the hope that someday they would come to the negotiating table with us. A fond hope that is receding by the day as Trump oses up to the Pakistan army.

Why is it so hard to make peace with Pakistan? Why does every attempt at peace lead to military or terrorist actions from their side? Ayesha Siddiqi's 2007 book, *Military Inc: Inside Pakistan's Military Economy*, explains this well. She shows that the Pakistani army is not funded by the State and does not answer to Parliament. Instead, it is a self-financing economic behemoth that works outside normal financial controls. Through military welfare foundations such as Fauji, Shaheen, Bahria and the Army

CHOPPING AND CHANGING TO DELIVER

LIKE a pack of cards shuffled and reshuffled to randomise the stack before dealing out to players, the Election Commission of India announced major changes to the bureaucracy in West Bengal in less than 24 hours after announcing the schedule for the state's assembly elections. Characteristically, Chief Minister Mamata Banerjee reacted sharply, calling it "mid-night mayhem", complaining that it flouted protocol and suggesting it was hamper administrative work. For good measure, she claimed that all officers in West Bengal worked for the state.

The ECI's challenge is quite extreme. It has opted for a two-phase election in a state where recent elections have been held in seven and eight phases. If chopping and changing the top officials is a mistake, the aggressive yet prudent state move reeks of the now-chronic distrust between the state and central institutions. It must be considered an exercise in ensuring a level playing field to kick off a free, fair and violence-free election.

The Trinamool Congress is already tainted with a reputation of unleashing violence before and after elections. The BJP has played victim in the past. But its local leadership—from the noisy Leader of Opposition in the state assembly, Suvendu Adhikari, to past state party president Dilip Ghosh—has warned there will be retaliation. Ghosh has gone so far as to declare there will be more injuries than heads banded and legs in casts, an obvious albeit oblique reference to Banerjee's accident in 2021 after which she campaigned in a wheelchair.

For starters, Chief Secretary Nandini Chakravarty and Home Secretary Jagdish Prasad Meena have been moved out and are to be excluded from any position to do with the election process. While it may not be a grudge order, the chief secretary was earlier summoned to Nirvachan Sadan in Delhi to explain why several ECI directives had not been implemented. Others on the chop-and-change list include Peeyush Pandey, who was temporarily replaced as Director General and Inspector General of Police by Siddh Nath Gupta, and Supratim Sarkar, replaced as Kolkata Police Commissioner by Ajay Kumar Nandan. A statement from Nirvachan Sadan has promised more changes to follow.

As a demonstration of its powers and promise, which is an obligation under the Constitution, the ECI's orders for



SHIKHA MUKERJEE

Political commentator

the changes are a shock-and-awe exercise. Since the ECI is not required to explain its actions, the measures are open to speculation—including the most obvious one that it is concerned about the bureaucracy following its orders promptly and fully. Whether these changes will satisfy the ECI before and after the voting is a different matter. In the 2024 Lok Sabha elections, the ECI had shunted out the home secretaries of Gujarat, Uttar Pradesh, Bihar, Jharkhand, Himachal Pradesh and Uttarakhand, as well as the DGP of West Bengal.



Given West Bengal's history of political violence, the Election Commission's decision to replace top bureaucrats right after announcing the voting dates was not unpredictable. But the state's roll revision is still incomplete. The commission has a tough job in ensuring a fair exercise of franchise

The necessity to have a truly acquiescent bureaucracy in West Bengal is understandable. The ECI is under extreme pressure because its final voter list for the state is still incomplete, with over 60 lakh names under adjudication and direction from the Supreme Court that it must continue to dispose of pending cases up until the last minute before polling day. With 294 constituencies with voter lists under adjudication, the public mood is volatile, political tempers are unpredictable and managing the environment difficult. Chief Election Commissioner Gyanesh Kumar said on March 10 in Kolk-

ata, "Political violence will not be tolerated, no elector will be placed under any kind of pressure, and anti-social elements will refrain from any acts of violence. If they try to indulge in such acts, then strong action will be taken." Given the changes, Kumar can hope to deliver on his promise.

After the seven-phase 2024 elections, delivering a two-phase violence-free one that satisfies political participants and voters alike—some of them, still waiting for confirmation on their right to vote—is a daunting task. In phase one on April 23, 152 constituencies from north to south Bengal will go to the polls. All these constituencies are located west of an imaginary line that splits the state vertically into two. As it happens, most of the seats won by the BJP will go to the polls on Day One. Of the 152 seats in the first phase, the BJP won 59, mostly from north Bengal, and Trinamool won 92.

Of the 142 constituencies to vote on Day Two—all of them in South Bengal and several along the 2216-km border with Bangladesh—the Trinamool won 123 seats against BJP's 18. The districts with the most delimitations and adjudicated cases are clubbed in the second phase—Murshidabad (11 lakh cases), North and South 24 Parganas. A third of the cases under adjudication are in Murshidabad and Malda (8 lakh), the latter voting in the first phase. There are 4.8 lakh cases under adjudication in Uttar Dinajpur; 5.9 lakh in North 24 Parganas, and 5.2 lakh in South 24 Parganas. These districts also have a high share of Muslims.

Amid these powder kegs, Kumar has a reputation to retrieve. The ECI's credibility has been torn to shreds by three of the four principal parties in West Bengal—with the Trinamool, Congress and CPI(M) being on the same side. The gap between Kumar's target and performance on the state SIR, with delays and a large number of legal proceedings, means that he now has to go an extra mile to ensure that eligible voters, purified and certified by the roll cleansing, get to exercise their franchise.

(Views are personal)

MAILBAG

WRITE TO: letters@newindianexpress.com

Sensible vigilance

Ref: *Test of ECI's fairness* (Mar 17). The editorial speaks volumes, especially on the inhumane attitude of the vigilante squad that could have been avoided had it used a humanitarian perspective. Now that the electoral field is set, it's up to eligible voters to exercise their franchise without fail. **Rajakumar Arulandham, Tirunelveli**

Reckless behaviour

Ref: *How not to be the Leader of Supposition* (Mar 17). I don't think any other LUP had such an obvious practice of seeing negativity in anything the government does. Rahul Gandhi tends to be extremely reckless, like calling the Prime Minister names without giving any evidence why. **P Mangalachandran, Kannur**

Trust deficit

Ref: *Unprecedented purge of Mamata's top babus* (Mar 17). The Election Commission has rightly earned the ire of the opposition for dancing to the central government's tunes. This wholesale purge to defang the incumbent chief minister clearly exposes CEC Gyanesh Kumar's partisan attitude. **P Aravind, Chennai**

Power politics

Ref: *INDIA bloc cross-vote* (Mar 17). The continuing trend of defections and voting against the whip is an appalling scenario in our democracy and a pointer to the prevalence of power politics or political high-handedness. The practice against the people's mandate is a blot to the high-ideals of the nation. Electors should identify such politicians and vote wisely. **Jiji Panicker K, Alappuzha**

India's responsibility

Ref: *Not in talks with US over Strait of Hormuz* (Mar 17). Peace can't be kept up by force, but only through dialogue and diplomacy. That is a policy set in stone by India. In the wake of the US's recent military action, India must yet again take the responsibility to initiate dialogue. **R Pichumani, Thanjavur**

Identity politics

Ref: *Inclusion of state OBC castes* (Mar 17). Political outfits are well aware that identity and caste, historically, is inseparably united with our politics and take advantage of this quirky situation to remain in power. Contrarily, political parties must put effort forwards to eliminate casteism for the genuine progress of India. **Thomas K M, email**

The Tribune

ESTABLISHED IN 1881

Restless Ladakh

Centre must focus on constitutional safeguards

THE protest rallies held in Leh and Kargil on Monday should be an eye-opener for the Union government. Ladakh's key demands — statehood and inclusion in the Sixth Schedule — remain unaddressed despite gestures such as the release of activist Sonam Wangchuk after nearly six months in jail. The Centre's decision to revoke his detention under the National Security Act indicates willingness to defuse tensions, but it is only a starting point in a potentially long process of reconciliation and democratic engagement. Wangchuk's wife, Gitanjali Angmo, had to give an undertaking that he had no political ambitions and would not pursue the path of agitation. This is a telltale sign that the Centre wants him to toe its line — obediently and unconditionally.

The latest rallies were peaceful, unlike the protests that had turned violent in September last year. It's clear that Ladakhis are not against the Indian State but are seeking constitutional safeguards to preserve their unique cultural, environmental and demographic identity. Their demands are part of a political movement that has intensified after Ladakh became a Union Territory in 2019.

Describing his release as a "win-win" development, Wangchuk has stated that the Centre has extended its hand to build trust for a meaningful dialogue with the people of Ladakh. The government has said that it remains committed to facilitating constructive talks with all stakeholders. Why then was Wangchuk kept in detention? The entire episode has flagged the perils of using stringent laws in politically sensitive situations. Importantly, voices from within Ladakh are emphasising consensus over confrontation. The Centre must respond with sincerity, ensuring that the next round of talks is not inordinately delayed. The release of remaining detainees and withdrawal of cases linked to protesting dissent but in engaging with it for the sake of peace and stability in the strategically important region.

Enforcement gap

Stronger mining laws fail sans accountability

PUNJAB's latest legislation to regulate mining reflects a familiar pattern in governance: a strong legal response to a problem that is, at its core, administrative. Illegal sand and gravel mining has long plagued the state, eroding riverbeds, damaging rural roads and causing substantial revenue losses. The new Bill signals intent, but that alone will not dismantle entrenched networks that thrive on weak enforcement and political patronage. For years, successive governments have introduced tighter rules, higher penalties and more elaborate licensing systems. Yet illegal extraction continues. *The Tribune* has highlighted persistent illegal sand mining in the Swan riverbed in Ropar with heavy machinery operating at night despite NGT restrictions. It raises concerns over enforcement failure, environmental damage and possible official complicity.

The reason for continued illegal mining is not the absence of laws, but the lack of consistent, on-ground accountability. Enforcement agencies remain understaffed or compromised, monitoring is sporadic and coordination between departments is poor. In many cases, local communities bear the environmental and infrastructural costs while the state exchequer loses out.

The challenge, therefore, is to shift focus from legislation to implementation. Technology can play a critical role — GPS tracking of mining vehicles, real-time monitoring of extraction sites and transparent e-auction systems can reduce discretion and curb leakages. Equally important is fixing responsibility: officials who fail to act against violations must face consequences. Without deterrence, even the best-crafted laws risk becoming symbolic. Punjab must also address the demand side. Construction activity continues to fuel illegal mining, often because legal supply is either inadequate or priced too high due to regulatory bottlenecks. Rationalising the legal mining process and ensuring steady supply could reduce the incentive for illegal operations. The credibility of the mining laws is judged by visible outcomes — cleaner riverbeds, safer infrastructure and higher revenues.

ON THIS DAY...100 YEARS AGO

The Tribune.

THE TRIBUNE, THURSDAY, MARCH 18, 1926

Montgomery jail incident

WE have already had something to say about the report of the Punjab Jail Committee on the assault on Lala Botha Rai, MLC, at the Montgomery jail and the action taken by the government on that report. The committee found that the assault was premeditated and instigated by the jailor. This finding is, however, not unanimous. While Mr Justice Jai Lal and Sheikh Abdul Qadir are agreed as to the guilt of jailor Naimatullah Khan, the president of the committee, OF Lumsden, holds that "the case against the jailor falls short of proof, though it certainly amounts to strong suspicion." As to the remarks of Mr Justice Jai Lal and Sheikh Abdul Qadir regarding the jailor's attempts at avoiding an adequate inquiry into the incident, suppressing the correct facts, screening the offending prisoners as also the deliberately false report made by him in his journal about the incident, Lumsden is in agreement with the conclusions of his colleagues. It would thus appear that even Lumsden agrees that the jailor behaved in a most improper manner and that even if he did not actually instigate the crime, his whole conduct was reprehensible and he not only failed in his duty as a jailor to take proper steps for instituting an inquiry when the incident was brought to his notice, but actually took it upon himself to fabricate false evidence to explain away the assault and save the offending prisoners from the consequences of their act. We refuse to believe that the jailor would have done all this unless he was intimately concerned in the matter and sympathised with the criminals.

Beyond uneasy alliances in Tamil Nadu

Film superstar Vijay's quest for stardom in Dravidian political arena enlivens poll battle

SOUTH SIDE
NIRUPAMA SUBRAMANIAN

FEW Assembly elections in Tamil Nadu have caused so much anticipation as the one that will take place on April 23. The entry of a significant new player in what used to be a predominantly two-way contest has created a flutter that has not been seen for decades. In Kerala, which goes to the polls on April 9, it's a battle between two established coalitions — the Congress-led United Democratic Front will attempt to dislodge the CPI(M)-led Left Democratic Front, with the BJP trying to make inroads.

Celluloid superstar Vijay's quest for stardom in the Dravidian political arena has made this TN election largely about his prospects. Back-of-the-envelope calculations and feverish predictions are being made about how much of the vote share he will get, how that might translate into seats, and which of the two big Dravidian parties he will hurt.

Vijay himself has made it clear that he has not made this entry seeking work experience in politics. It has to be the chief minister's post in the first shot. And he would prefer to go it alone, unless the alliance that wants him on its side promises that he gets the top job and gives him a mouth-watering number of seats to contest. The AIADMK, which tried to bring his Tamilnaga Vetrin Kazhagam (TVK) into the NDA fold, stumbled over these demands.

Over the last week, the grapevine in Chennai buzzed again with rumours of another approach, this time from the BJP. The party wants a better outing than in the 2024 Lok Sabha elections, but clearly has little confidence in its forced electoral alliance with the AIADMK, which even the BJP's followers in the



AMBITION: Vijay has made it clear that he has not entered politics just to gain experience. PH

state are not enthused about.

The TVK could give the alliance the edge that it lacks now. The rumours got wings after it emerged that in a recent meeting of the TVK, some members pointed out that the party's candidates would not be able to raise Rs 5 crore, a sum well over the Rs 40-lakh limit set by the Election Commission of India (ECI), to meet their election expenses. The meeting was divided about entering into an alliance with a bigger party.

The reports were denied by both TVK and AIADMK. Vijay once described the BJP as his "ideological enemy" and an alliance with the Hindutva party might hurt his prospects among the Christian and Muslim minorities, who are now said to make up large numbers of his followers. The AIADMK would not mind the TVK joining the alliance as that would marshal the anti-incumbency votes, but fears being overshadowed by it.

For all the talk about Vijay joining an alliance, he is really a solo player. He sees his role in politics as similar to the roles he essays in films — vanquishing villains and being hailed as the Jana Nayagan (people's leader), also the title of his latest film. The movie was set for a Pongal release in January, but the Cen-

Vijay has described the upcoming polls as a 'war' between him and CM Stalin.

tral Board of Film Certification (CBFC) did not clear it, referring it instead to a review panel. Recently, the producers of the film withdrew their petition against the CBFC from the Madras High Court, clearing the way for the review panel.

Is the release of a film with a candidate acting in it a violation of the model code of conduct? That's a question for the ECI, but the answer, going by the selective track record of the past few years, may depend on which side of the Dravidian divide Vijay is seen to be hurting. The Nam Tamilar Katchi, a small Tamil nationalist party led by filmmaker Seeman whose vote share was growing, could turn out to be the worst hit. So far, Thalapathy (the Tamil word for General), which is how fans address Vijay, has reserved all his barbs for the ruling DMK and its leader, Chief Minister MK Stalin. He has addressed

few public meetings since the September 2025 stampede at his Kaur rally that killed 41 people. But whenever he has re-emerged, he has described the coming electoral battle as a "war" between him and Stalin.

He positions himself as fighting the alleged corruption and misuse of the DMK and claims to be the true inheritor of Periyar. K. K. Marudai, CN Annadurai and MGR. He ignores the AIADMK altogether. And he has never criticised his "ideological enemy", even though the CBI's ongoing enquiry into the Kaur tragedy is not what he and the TVK expected when the Supreme Court granted their request that the investigation be shifted from the Tamil Nadu police to the Central agency.

It is not clear what plans Vijay has for the state he is so determined to lead. He has not given any media interviews.

For his part, Stalin has decided to pitch the upcoming elections as a decisive battle for the preservation of the "Dravidian model" of development, describing it as a "contrast" to the BJP model, which he says is made up of "violence, hate speech and a regressive ideology". This is his refrain in all speeches. He points out correctly that despite facing pressures from the Centre, Tamil Nadu has posted a better performance than the so-called

"double engine" states. But he is also taking nothing for granted. Unlike in some other states, anti-incumbency kicks in every five years in Tamil Nadu. Only the Jayalalithaa-led AIADMK was able to break the pattern in the past decade when it won in 2016.

Just as Vijay ignores him, leaving it to others in the party hierarchy to take him on. But the party is nervous about him, especially after the political headway he seems to have made despite the Karur stampede. Moreover, the DMK's relations with its main ally, the Congress, in the Secular Progressive Alliance are not as close as they were in previous elections, given their public spat over seat-sharing. Talks on seat-sharing with smaller parties, including the two Left parties, and the Dalit party VCK, are proceeding slowly.

The AIADMK seems like a bit player in the elections. Apart from the BJP its coalition now includes TV Dinakaran, the nephew of the late AIADMK leader Jayalalitha's friend Sasikala. But Sasikala has launched her own party, which could pose a problem for the AIADMK in some constituencies. The party has also lost an influential leader to the TVK, and another, former chief minister O Panneerselvam, to the DMK.

A tie-up with the BJP comes with its own perils, as party leader Edappadi Palaniswami knows from watching how the saffron party's regional allies have fared in Maharashtra and Bihar. The grouping's lack of chemistry is obvious. In the 2021 elections, the DMK bagged 133 seats in the 234-member Assembly, winning a majority on its own. At the very least, the NDA will hope to create a dent in the DMK-led front large enough for a hung Assembly, even if it cannot inflict outright defeat; and for Vijay, either with it or separately, will play his part in this endeavour. After all, it was Piyush Goyal, the BJP's TN election in-charge, who described him recently as a "vote-cutter rather than a king or a kingmaker".

THOUGHT FOR THE DAY

Tamil Nadu has raised its head due to the achievements of the Dravidian model govt. — MK Stalin

The policeman and the 'bomb'

SY QURAISHI

RAMZAN in the walled city of Delhi is a great festival. One Ramzan evening produced a small episode of confusion that later became a favourite story in the neighbourhood.

That year, the city had seen a few incidents of crude bombs exploding at different places. Some people had been injured and the police were understandably alert. Even small firecrackers could make people uneasy.

Across the Jama Masjid stood the local police *chouki*. A Sub-Inspector (SI) had recently taken charge there. He was conscientious and determined to show vigilance. What no one had told him was that Old Delhi had its own unique Ramzan traditions.

As soon as the sun set, the Imam would wave a flag from beneath the southern minar to the man in the southeastern pavilion overlooking Uru Bazaar. In the park below, the man responsible for announcing *iftar* would light two small crackers. Their sharp sound carried the message across the neighbourhood that it was time to break the fast.

That evening, the routine began as usual. The sun had set, the flag had been waved. The man in the park bent down and lit the first cracker. It burst with the expected loudness. People reached for dates and glasses of sherbet. He then prepared to light the second one.

The new SI acted with lightning speed. From the verandah of the *chouki*, he had evidently heard the first explosion and seen the man crouched over something. Concluding that he had caught someone about to set off a second "bomb", he ran across the road and seized him from behind.

Within seconds, the man was pinned down and the SI declared triumphantly that he had caught the "culprit". Around the park, people stopped mid-*iftar*, wondering what had happened. The expected second cracker had not sounded. One minute. Two minutes. Five minutes.

The Imam of Jama Masjid soon appeared and walked over hurriedly to the small crowd. "Sahib," he said politely, "you have arrested our *iftar* announcer!"

The SI, still breathing heavily from his dash, replied that the man had been lighting bombs. "Not bombs," the Imam explained gently. "Crackers. We have used them for many years to announce the breaking of the fast. He lights two every evening."

The SI looked at the cracker still in the announcer's hand and then at the people gathered around. Realisation replaced suspicion. He released the man, somewhat embarrassed, and adjusted his belt. No victory has ever been so short-lived.

After a brief pause, the announcer struck a match and lit the second cracker. Right under the eyes of the cop. It exploded a few minutes later than usual, and the crowd resumed its meal.

The next evening, the SI was again at the *chouki* balcony at *iftar* time. This time, he simply watched as the announcer lit the two crackers in succession. He nodded quietly, having learned that in Old Delhi some explosions signal dinner, not danger.

The writer is a former Chief Election Commissioner

LETTERS TO THE EDITOR

Tap NavIC's true potential

Apropos of "Satellite navigation needs a reset"; despite ISRO's technological achievements, persistent issues such as satellite failures, delays and limited integration in consumer devices have restricted NavIC's effectiveness. The navigation system was envisioned as a step towards self-reliance, yet its relatively less use in smartphones and commercial applications reflects gaps in policy execution and industry collaboration. The government must ensure sustained funding, faster satellite deployment and stronger partnerships with private players and device manufacturers. A reliable and widely used satellite navigation is vital for national security, disaster management and economic development. Immediate corrective steps can help NavIC realise its true potential.

CHANDAN KUMAR, RAJAPURA

Learn from Kerala, Tamil Nadu

Refer to "Saving mothers"; for two of India's most economically prosperous states, Punjab and Haryana, to report maternal mortality ratios of about 90 and 89 respectively, both above the national average of 88, exposes a troubling paradox. The contrast with states like Kerala and Tamil Nadu is instructive. Kerala's MMR is around 30 (18-19 pre-Covid) and Tamil Nadu's about 35, achieved through strong primary healthcare, skilled birth attendance, functional referral systems and rigorous maternal death audits. These examples prove that policy commitments must translate into reliable systems on the ground. Punjab and Haryana must urgently move beyond announcements and strengthen district hospitals by adequate staffing and community-level monitoring.

RAMPHAL KATARIA, KURUKSHETRA

Restraint in freedom of speech

Refer to "Case closed"; dissent is the hallmark of democracy. While every voice must be heard, it should also be expressed with propriety. On sensitive issues, restraint and caution are the watchwords. The police on its part must apply principles of natural justice before registering an FIR. At the same time, unnecessary searches and seizures should not be resorted to create a fear psychosis. The Supreme Court's approval to the

prosecution to end the case gives a sense of closure. It is both a relief and a lesson.

ABHYAM SHARMA, PATHANKOT

Professor's case not an exception

Refer to "Case closed"; Article 21 of our Constitution guarantees to every citizen fundamental right to freedom of speech. Although such a right is subject to exceptions, whatever was said by Ashoka University professor through his social media posts, by no stretch of imagination, falls within the category of exceptions. Criminal action against him was not necessary, as the Supreme Court rightly held. Nevertheless, the apex court's observation is a wake-up call to those dissenters who cross the line of freedom of speech. Positive criticism of the ruling dispensation augurs well for a healthy democracy.

MD SHARMA, SHIMLA

Catering to religious sentiments

Refer to "For BJP Punjab a tough mountain to climb"; undoubtedly, the party is leaving no stone unturned in trying to impress and establish a rapport with Punjab voters by pandering to religious sentiments, like approaching demas to elicit their vote. However, its decision of not having an alliance with SAD, which has a strong following especially in rural areas, is going to spoil its game plan. The resultant split in votes and the current complex electoral landscape in Punjab will help the ruling dispensation AAP, which currently seems to be better placed despite various formidable challenges.

RAVI SHARMA, DHARWAL

BJP's influence on deras

With reference to "For BJP Punjab a tough mountain to climb"; in the 2022 elections, the AAP got a big majority because the people wanted change. The BJP has so far managed to gain some foothold in the urban areas of Punjab, but is virtually non-existent in the rural areas. Therefore, it is a tough fight for the BJP to form a government in Punjab by contesting elections alone. The BJP is influencing deras. The frequent visits of Haryana CM Nayab Singh Saini too will not yield any result. Akali Dal and Congress too are sailing through rough waters.

RAJ KUMAR KAPOOR, ROPAR

Opinion

WEDNESDAY, MARCH 18, 2026

Faltering flight path

Air India's turnaround story is losing altitude amid mounting safety and service concerns

FOR DECADES, THE Tata group represented the gold standard of Indian corporate governance. That reputation is precisely why the group's acquisition of Air India in 2022 was widely celebrated. The homecoming of the airline to the Tatas—who founded it in 1932—was supposed to mark the beginning of a revival. Instead, the story is increasingly looking like a reputational liability. The latest warning from the European Union Aviation Safety Agency is only the most recent sign of trouble. Surprise inspections of AI aircraft at European airports reportedly found several safety deficiencies, pushing the airline's fault rate close to the threshold that could invite enhanced scrutiny or even operational restrictions in Europe. India's aviation regulator has already stepped in with corrective measures to prevent potential consequences in a key international market. Coming on the heels of the airline's recent crises, the message is hard to ignore: Air India's problems are no longer episodic—they appear systemic.

The most traumatic blow came with the crash of Flight 171 in June 2025, a tragedy that shattered the narrative of a turnaround that the Tata group had been carefully constructing around the airline. Even outside that catastrophe, troubling signals keep surfacing. Technical incidents—including engine oil and fuel leaks—reached a 14-month high earlier this year, according to internal airline data. Regulators have repeatedly flagged deficiencies in crew training, fatigue management, and operational procedures. An audit last year reportedly found more than 50 safety lapses, ranging from training gaps to documentation failures. These are not minor teething troubles. Equally damaging is the everyday experience of passengers. Social media is replete with images of torn seat cushions, malfunctioning entertainment screens, and delayed flights. Such issues reinforce a perception that the airline has yet to shake off the culture of neglect inherited from decades of state ownership.

To be fair, the Tata group inherited a deeply troubled institution. When the government sold AI, it was effectively passing on an airline hollowed out by years of bureaucratic inertia and chronic underinvestment in maintenance and service. Rebuilding such an organisation was never going to be quick or easy. But the passage of time is beginning to erode that defence. Four years after the takeover, expectations have shifted. What initially looked like legacy baggage now risks being interpreted as managerial failure. Massive aircraft orders, a sweeping brand overhaul, and the integration of multiple airline businesses were meant to transform the carrier into a world-class competitor. Instead, the airline's recurring operational embarrassments are threatening to overshadow those ambitions.

For a conglomerate whose brand equity rests heavily on trust and reliability, the reputational stakes are particularly high. AI's problems are no longer confined to aviation; they risk spilling over into perceptions of the Tata group itself. In that sense, the airline is increasingly becoming the group's Achilles' heel—a single weak spot that could undermine an otherwise formidable corporate reputation. Restoring confidence will require rebuilding a safety culture, enforcing operational discipline, and, above all, delivering a consistently reliable passenger experience. Airlines operate on trust—the trust that aircraft are maintained flawlessly, that crews are trained rigorously, and that systems function without compromise. The Tata group took back Air India partly for sentimental reasons and partly for strategic ambition. Today, sentiment alone will not rescue the airline. What will matter is execution—and the clock is ticking. India expects the Maharaja to do better.

Private credit is entering its musical chairs phase

EVERY FINANCIAL CRISIS has a moment—usually identified only in retrospect—when an obscure product intended to mitigate risk spreads through what author Rick Bookstaber called “tightly coupled” interconnections to cause widespread damage. The first sign is signs of hard-to-understand stories that seem unrelated except that they all involve a single sector.

Think of all the stories in 2006 and early 2007 about subprime mortgages, underwriting fraud, Bear Stearns hedge funds, collateralised debt obligations, market-to-market accounting, and other technical-sounding events that seemed far removed from the real economy and retail investors—until they weren't.

Starting late last year, private credit has been the subject of lots of stories about complicated problems facing a sector that's gone from being largely invisible to managing more than \$3 trillion and becoming a crucial lender to riskier businesses. The stories involve different types of private credit and different aspects of the products: margin loans, redemption requests, and payment-in-kind, among other things.

We're not seeing an abnormal number of defaults or missed payments, but this is due largely to the way these deals are structured. The “shadow default rate” in private credit rose 150% between the final quarter of 2021 and the fourth quarter of 2025. More broadly, the extra yield the market demands to lend to riskier borrowers is near historic highs, so this is not, or not yet, a problem for public bonds or bank loans to firms.

Private credit grew in the aftermath of the 2008 crisis, when regulators moved to get riskier lending off bank balance sheets and into the hands of long-term, real-money investors capable of absorbing losses during credit crunches. Until recently, only sophisticated institutions and ultra-wealthy investors could access private credit funds, largely hidden corners of finance where non-bank lenders raised money to make loans to mid-size firms, away from the scrutiny of public markets.

The sector's years in the shadows ended thanks to regulatory change pushed through by executive order last August, allowing private credit funds to sit inside 401(k)s. If you have one, there's a reasonable chance some of your retirement savings are already there. You may also own some public Business Development Companies or private credit exchange-traded funds, perhaps labelled “evergreen” or “interval” funds. Your bank may have lent large amounts to the sector. Public pension funds, endowments and insurance firms have significant exposures to the market, too.

The beginning of a credit crunch is like a game of musical chairs. Borrowers are not generating enough cash to make payments on loans or cannot access new funding to repay maturing debt. In simpler days, the bank lender absorbed the loss from its capital buffers and excess interest income on performing loans. It could work for months or years through restructuring or bankruptcy to get partial recovery.

Things are more complicated with private credit. Some private credit funds retain as much as 30% of assets under management as cash to cover redemption demands and cash shortfalls. Most funds can limit redemptions, and all funds can cut payments to investors. Some funds can try to raise additional capital or sell positions, but when private credit is troubled, these alternatives may be unattractive or impossible. If the fund has borrowed money, its lenders can try to grab some cash by cutting the value of the loan on their books and demanding additional margin cash. Many borrowers have the option to make debt payment by giving additional debt rather than cash, further sapping the fund's liquidity.

The original plan for private credit was when bad times hit the losses would be absorbed by long-term investors who would find themselves temporarily holding frozen investments with little or no cash return. With apt portfolio planning, this is a survivable event that should have limited impact on the real economy or financial system. We do not seem to be seeing an orderly fire drill of people heading for designated exits. Rather there seems to be tussling among banks, borrowers, and investors to get first crack at whatever cash is available. It remains to be seen who'll get punched in the face.



AARON BROWN
Bloomberg

AS THE WORLD tries to come to terms with the energy crisis caused by the US-Israel military conflict with Iran, China finalised its 14th National People's Congress (NPC). To be implemented over the next five years (2026-2030), the FYP is distinct in its strategic emphases for enabling China secure its global ambitions.

The first emphasis is on lowering economic growth. Since the 11th FYP, China has been bringing down its target rate of annual growth of GDP. While the 11th FYP (2006-2010) promised 7.5% growth in GDP, the 12th FYP (2011-2015) and 13th FYP (2016-2020) targeted 7% and 6.5% annual average growth rates. The 14th FYP (2021-2026)—the first five-year plan announced after Covid-19—focused on “high-quality” growth as opposed to high growth and underperformed annual average growth rate targets of around 5%. The latest FYP has maintained the trend and refrained from setting predetermined annual growth targets. While the text of the final FYP is awaited, the broad expectation is that the growth target will be capped at 5% with a “reasonable range” justifying an even lower annual average growth of 4.5% or thereabouts.

Why is China settling for lower GDP growth? The post-Covid narrative on economic growth in China has concentrated on greater allocation of resources in strategic sectors of the economy. These include robotics, artificial intelligence (AI), quantum computing, civil aircraft production, green industry, semiconductor, and bio-manufacturing. All these sectors are strategic 21st century industries and are being developed for making China hold decisive comparative advantages in their production and supply chains. The geo-economic intent behind controlling the global outputs of these sectors is obvious. Implementing the intent, however, requires

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HEALTH COVER

Union Finance Minister Nirmala Sitharaman

Health insurance is a priority for this government. In fact, we are hoping that by 2033 we will have insurance cover for all

FIVE-YEAR PLAN

AIM TO IDENTIFY TECH BREAKTHROUGHS UNDERSCORES GOAL OF SECURING LEVERAGE IN INDUSTRIES OF THE FUTURE

Enabling Chinese ambitions

shifting state resources from earlier traditional low-cost export-intensive sectors to the mentioned strategic ones. The latter are now the prime focus of Chinese industrial policy and need heavy investments. Mobilising these investments mean walking back from the earlier strategy of subsidising export-oriented production across the board. While these subsidies can maintain export growth in the short term, as the Chinese workforce shrinks and low-value production moves to other locations, China realises the futility of broad-based export-enhancing subsidies. The emphasis, therefore, is on pushing the state resources to sectors that matter for long-term gain even if that means compromising on exports and overall GDP growth.

Furthermore, with domestic infrastructure across the mainland having reached a threshold level of operational efficiency, China can afford to allocate resources to other sectors. Such reallocation also entails lower rates of growth of GDP. This is inevitable as traditional industrial sectors slowly yield space for future ones, resulting in a structural slowdown and imbalanced industrial growth. Growth aspirations also need to be tempered given the other major structural transformations in the economy, notably shifting to climate-friendly production and hosting greater parts of strategic supply

chains within the domestic economy. The second and notably eye-catching emphasis of the 15th FYP is on technological self-reliance and developing capacities for becoming the world's leading power in cutting-edge innovative sectors. Three key aspirations are notable in this regard: Maintaining aggregate research and development (R&D) expenditure at more than 7% of GDP; increasing the number of high-value invention patents to more than 22 for every 10,000 people; and lifting the share of digital economy industries to 12.5% of GDP. In 2025, China's aggregate R&D expenditure was already 9.1% of GDP, while high-value invention patents and the share of digital economy were 16 and 10.5% respectively.

An eye-catching emphasis is on tech self-reliance and developing capacities for becoming the leading power in cutting-edge innovative sectors

The R&D metric is especially significant in understanding China's long-term strategic ambitions. High R&D expenditure aims to modernise traditional manufacturing industries, such as chemicals, electronics, engineering, and automobiles. The ostensible objective is to push these industries up the value chains to high-value added functions supported by greater use of AI. The prominent emphasis on robotics and AI in the 15th FYP underlines this goal along with the understanding that more functions in the modernising traditional industries will be handled by customised robots.

On the other hand, more R&D resources will be deployed in scaling of 21st century industries like embedded AI, bio-manufacturing, green hydrogen, and high-end medical equipment. The fact that China aims to work on identifying key technological breakthroughs in AI and quantum technology, biotechnology, and new energy through the thrust on invention patents and encouragement of their strategic deployments through suitable incentives underscores its geo-economic ambition of securing and retaining leverage in industries of the future. A variety of policies for supporting enterprise innovation, such as increasing deduction for enterprise R&D, enlarging the scope of venture capital funds for enterprises pursuing innovation, and facilitating foreign investment in venture capital are some of the key ones for supporting the goal.

The Chinese FYPs represent a dedicated pursuit of state-driven industrial policy for achieving economic objectives. The 15th FYP maintains the thrust. The strategic goals of the FYP, however, need to be balanced with structural gaps that have become striking in the domestic economy. Most important among these are high household debt precipitated by a melting property market and the concomitant effect on domestic consumption. These are vulnerabilities that are hard to overlook. The rapid deployment of industrial robots, including humanoids, for greater productivity and efficiency has inevitably shrunk opportunities for many among the workforce. The 15th FYP notes some of these concerns and aims to address these through the transforming economic landscape that will pivot on robotics and AI. While the latter construe an infrastructure essential for securing China's capacities in 21st century industries, they might, however, entail other welfare costs.

Views are personal

Welfare success meets global supply crunch

India's LPG demand has surged due to welfare initiatives. While a safety net is necessary, simply subsidising LPG will only keep consumption high



Y SHUNMUGAM

The author is Partner, MCGube, and a commodity markets expert

THIS MONTH, a surge in panic buying and long queues at LPG distributors surprised Indian households. The root cause is supply disruptions from the West Asia conflict, combined with India's remarkable clean-cooking success. Over the past decade, policies like the Pradhan Mantri Ujjwala Yojana (PMUY) have connected about 330 million households to LPG. However, our refineries produce less than half of the required LPG, making India heavily reliant on imports. This dependency exposes every gas stove in the country to global supply shocks.

India's LPG demand has surged due to welfare initiatives. Since its launch in 2016, the PMUY aimed to replace smoky chulhas with cleaner LPG stoves for women in low-income households. By early 2025, there were roughly 32.9 crore active domestic LPG connections, with over 10.3 crore beneficiaries. A decade ago, India used roughly 15 million metric tonnes (MMT) of LPG; now it is 31-32 MMT. Overall, policy has greatly expanded LPG usage, benefiting public health and women's empowerment, but the demand has exceeded domestic supply capacity.

This surge in demand conflicts with strict supply limitations. Indian refineries are unable to produce enough LPG. Even at maximum capacity, domestic production covers only 40-45% of the demand. Why is the domestic supply so low? Because LPG (propane and butane) is a by-product of crude oil and gas processing. Refineries prioritise oil products and petrochemicals, leaving little room to increase LPG output beyond their original design. The government has invoked the Essential

Commodities Act to compel refineries to divert all available propane and butane to LPG production. This move raised output by roughly 25%, according to officials, but it still couldn't fill the supply gap.

Import logistics worsen the issue. About 90% of our LPG imports originate from West Asia, with over 85% passing through the Strait of Hormuz. A brief halt in Hormuz transits in March nearly stopped all new LPG shipments to India. Besides, we have minimal storage capacity. Unlike crude oil, there are no significant government LPG reserves. Once imported, LPG must quickly move through bottling plants and distributors.

Many factors make LPG particularly vulnerable. First, it is primarily a household fuel. Over 330 million homes depend on LPG cylinders for cooking, with many refilling every two-four weeks. This short refill cycle means any disruption quickly affects lives. In contrast, a month-long supply interruption of petrol or diesel can be mitigated somewhat through stockpiles and filling stations. Second, LPG logistics involve numerous hand-offs: ships to tanks, trucks to bottlers, and distributors to consumers. Each transition introduces a potential point of risk. Third, a non-price shock is driving the current crisis: the main problem is hoarding and uncoordinated distribution. Overall, LPG's role as a clean-cooking welfare good, distributed in cylinders, makes its security issues fundamentally different from those of oil or natural gas.

Policymakers have implemented emergency measures, ordering refineries to maximise LPG recovery for domestic use. The oil ministry directed both imported and domestic LPG to be sold only to households, banning industrial and export channels, with a 25-day booking limit to prevent hoarding. The government is diversifying sources by securing cargoes from the US and other non-Gulf suppliers and revising contracts to avoid critical routes. Demand-side measures include maintaining free Ujjwala connections, providing ₹300 per refill (up to 12 cylinders), and promoting alternatives like piped natural gas (PNG) and electric cooking. City gas networks are slowly expanding, with some states piloting induction stoves and biogas plants.

Many gaps still exist. First, domestic production remains well below required levels. Relying heavily on a limited import source is risky. Diplomacy and contracts may prevent immediate crises, but a prolonged disruption, like a long-term Hormuz crisis, would be disastrous. Second, storage capacity is incomplete, and adequate only for short-term disruptions. Third is on-demand substitution: PNG pipelines supply only 4% of households, and electric cooking is not yet widespread. Deepening these options will take years, making LPG indispensable for most. Fourth, subsidy policies still promote high usage. While a safety net is necessary, simply subsidising LPG will keep consumption high. Structural improvements are necessary.

LETTERS TO THE EDITOR

Wary foreign investors

Apropos of “Stronger headwinds” (FE, March 17), India's foreign exchange reserves are bleeding quickly, and the numbers demand attention beyond routine reassurance. A single-week drop of nearly \$12 billion, sustained FDI outflows, 14 months of foreign portfolio selling, and a rupee in persistent retreat together paint a picture that no amount of official optimism can fully airbrush. The Reserve Bank's

dollar interventions, while necessary, only accelerate the very depletion they seek to contain. A potential oil price surge to \$100 a barrel could widen the import bill by \$50 billion annually, stretching an already strained current account. Praising macroeconomic resilience while capital quietly walks out of the door is a contradiction India can ill afford. Credible reforms, not comfort statistics, are what foreign investors are waiting to see. —K Chandan Kumar, Bangalore

Reviving inflows

India's foreign exchange reserves fell by \$11.68 billion in the week ending March 6, the steepest drop in more than a year. The decline reflects possible intervention by the apex bank to stabilise the rupee amid currency pressures. Weak capital inflows have also led to the fall in reserves. Global financial uncertainty has made foreign investors more wary about emerging markets, including

India. As a result, foreign portfolio investments into Indian equities and debt has slowed. This in turn has raised concerns about the strength of external financing in the near term. Analysts opine stronger policy signals are necessary to reassure global investors. Restoring investor confidence will be a crucial key to reviving foreign inflows. —PV Prakash, Mumbai

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War to decide Middle East's future, dynamics of western alliances

US President Donald Trump recently said that he was "not happy with the UK" for the delay in sending two aircraft carriers to the Middle East. In fact, he has reasons to be unhappy with all American allies. Japan and Australia have announced that they were not planning to send navy vessels to West Asia to escort ships through the Strait of Hormuz, which the US President called on the allies to do. He wanted them to create a coalition to reopen the vital waterway. But Japan and Australia are distant US allies; even the UK and Germany, US allies in the North Atlantic Treaty Organization (Nato), have also not been much use in the war against Iran. UK Prime Minister Keir Star-

mer has made it clear that his country will not be drawn into a "wider war" and he is "working with allies" on a viable plan for the Strait of Hormuz. German Chancellor Friedrich Merz was blunter, while asserting that the ongoing war in Iran "is not a matter for Nato". The arguments proffered by US allies are specious and self-serving; they need American military support, which is critical, according to the Nato website, "for the provision of some essential capabilities, regarding for instance, intelligence, surveillance and reconnaissance, air-to-air refuelling, ballistic missile defence, and airborne electromagnetic warfare." Moreover, the US' contribution to the total Nato expenditure is the

highest. But they would not help the US when it needs them. Merz's comment is particularly cheeky. At any rate, the US-Israel alliance is fighting for lasting peace in the Middle East, where Iran is the biggest troublemaker, preparing a nuclear arsenal, supplying drones to Russia, and arming and aiding terror groups like Hezbollah. The challenge heaped by Tehran is not confined to the Middle East. Therefore, supporters of stronger action against Iran argue that the US-Israel alliance is not merely fighting a series of isolated confrontations but is attempting to create a peaceful Middle East. From this perspective, confronting Iranian expansionism and preventing the development of nuclear weapons are essential steps toward a more stable regional order. The argument holds that failing to act decisively now could allow tensions and proxy conflicts to grow, eventually leading to a far more volatile confrontation in the future. At the same time, advocates of this position stress that safeguarding the Strait of Hormuz is not solely an American or Israeli concern. After all, the waterway is a vital artery for global energy supplies, disruptions there would affect economies around the world. Oil-importing nations in Europe and Asia would be particularly vulnerable to price shocks and supply shortages. For this reason, proponents believe that ensuring safe passage through the Strait should be

treated as a collective international responsibility rather than a mission carried primarily by the US. The debate highlights a recurring challenge in international alliances: balancing national interests with collective security commitments. While Washington expects its partners to contribute more actively to confront perceived threats, many allies prefer diplomatic engagement and caution over military escalation. Whether a broader coalition eventually emerges to secure the Strait or whether the US and its closest partners act largely on their own will shape not only the future of the Middle East but also the evolving dynamics of Western alliances in an increasingly uncertain global landscape.

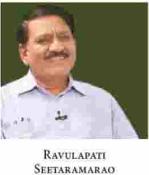
LETTERS

A fitting salute to the 'people's poet'

The prestigious Sahitya Akademi Award 2025 being conferred on eminent Telugu poet Nandini Siddha Reddy is a moment of immense pride for Telangana's literary community. This makes for a significant acknowledgment of contemporary Telugu literature. What makes this honour particularly meaningful is the thematic depth of the award-winning *Animesha*, which revolves around lived realities of ordinary people during the Covid-19 pandemic. Siddha Reddy's contribution extends far beyond a single book. As the first chairman of the Telangana Sahitya Akademi, he played a crucial role in promoting the State's regional dialect, folklore, and literary heritage. His earlier achievements—including the Nandi Award for penning stirring lyrics in the film *Poru Telangana*—reflect his rare ability to bridge the worlds of creative literature, cultural activism, and public consciousness. The latest recognition is not merely an individual accolade but the illustrious son of the soil, whose journey started from a small village in Siddipet but a celebration of Telangana's cultural identity and the enduring power of socially conscious poetry.

Vidyaagar Reddy Kethri, Hanumanakonda

Firecracker units have become the new killers



RAVULAPATI SEETARAMARAO

Firecrackers have become deadly! If vendors who run these businesses like those running shops in the ordinary market-selling goods without following safety regulations are allowed to make fireworks and firecrackers in the run-up to Diwali with unskilled, low-paid workers, and authorities do not immediately rein them in, the number of casualties from such accidents will keep rising each day. This dangerous trade, produced without any precautions whatsoever, has become a business of hazards. If this bundle of explosives, which has turned into a "high-risk industry" is not regulated, both the number of fire accidents and the death toll will inevitably keep growing. Last October in the Konaaseema district of Andhra Pradesh, a major fireworks explosion in Grand Fireworks claimed ten lives. When Sri Surya Fire Crackers exploded in Vetapalem village, 20 per-



Aftermath of the blaze in Grand Fireworks at Rayavaram village of Dr BR Ambedkar Konaaseema district last October

sons lost their lives in an instant. It was later discovered that both units belonged to the same person. In fact, even though the government had ordered the Vetapalem unit to be shut down as early as January, it is shocking that this controversial company was allowed to continue. It caused yet another deadly disaster. In the early days, Diwali fireworks used to bring immense joy to everyone! But because of the use of explosive materials was less, hazardous situations were not common. Streets would buzz with activity—sparkling flowerpots, moonlight crackers, sparklers and small ground-springs—making the festival a source of immense happiness for families, especially for children. Nagpur in Maharashtra and

Sivakasi in Tamil Nadu have the most number of manufacturers of fireworks. Back then, even though strict safety rules were not always followed, the limited use of explosives in manufacturing did not cause any large scale deaths. When accidents did occur, media coverage would spur governments into immediate action to prevent any loss of life or property. The officials responsible for overseeing fireworks also acted responsibly and took appropriate measures whenever needed. Having seen those days, today thinking about the accidents happening these days makes for a terrifying proposition! In Nagpur, an explosion at the SBEL Energy factory killed 90 workers, most of them being women. In the

It is now crucial that there be a comprehensive review of safety procedures and a deep study of the extent the senior officials are supervising the works in the factory and are swearing by the dos and don'ts. Investigations must determine whether the businesses are providing safe, convenient, and accident-free environments. Licenses should be revoked and criminal action taken against all violators. Otherwise deaths and property losses from these incidents will not stop

last two years alone, over 20 people have lost their lives in accidents at these very units. We should also remember that two people died in solar explosions. This solar plant is huge. Its owner even received the Padma Shri award. Locals mockingly talk about that award, implying it reveals the political connections the owner must have had. It is because of such political connections that officials responsible for enforcing the relevant laws turn a Nelson's Eye to the sordid goings on. The tragic irony is that those working in such hazardous units are vulnerable as they are unprotected. Whether or not the governments care, accidents keep happening, which is a grievance that the locals keep cautioning about but to avail. People complain that because adequate safety measures are not implemented, as the managers of those units are not prosecuted under the

law, accidents are becoming too frequent. In fact, Nagpur has a safety organization responsible for ensuring that protective measures related to petroleum and explosives are in place and in working condition. Because of whistleblowers from that organisation, there have been CBI investigations. Investigations into PSEO officers, accused of issuing licenses and taking bribes, have been carried out; yet explosions and loss of life continue unabated. It is now crucial that there be a comprehensive review of safety procedures and a deep study of the extent the senior officials are supervising the works in the factory and are swearing by the dos and don'ts. Investigations must determine whether the businesses are providing safe, convenient, and accident-free environments. Licenses should be revoked and criminal action taken against all violators.

Otherwise deaths and property losses from these incidents will not stop. In Sivakasi, because authorities have enforced strict measures to prevent accidents and have ensured that child labour is not used in such hazardous units, the number of incidents — and consequently the loss of life — has decreased to noticeable levels. Many years ago, Diwali fireworks shops used to be located away from towns. That made it clear that precautions were being taken so that, if accidents happen by mistake, the damage would be limited. Police were often stationed near those shops, constantly checking whether the merchants were taking proper safety measures. Shops opened and closed on schedule. Even if many people went from shop to shop to buy crackers, arrangements were so made that they could leave quickly. Today, even though more shops are set up in crowded places, safety measures are being tossed out. Experience shows that stalls and shops selling items meant for the Diwali celebration were run in ways that never brought sorrow or anguish to families. (The writer is a retired IPS officer, who has served as an Additional DGP of Andhra Pradesh)

Making kids emotionally brave

With reference to the article "Raising Emotionally Brave Kids" by Deepthi T Nair (THI March 17), I would like to thank the author for highlighting an important concern of modern parents. In today's achievement-driven world, many parents tend to shield their children from every possible disappointment. While this stems from love and concern, the article rightly explains how overprotection can weaken a child's emotional resilience. Allowing children to face small failures helps them understand that setbacks are temporary and manageable. Such experiences gradually develop courage, patience and problem-solving abilities. Children learn that success is not always immediate and that effort and persistence are essential to overcome difficulties. This mindset prepares them not only for academic challenges but also for emotional and social situations later in life. The article is particularly helpful for present-day young parents who often struggle to balance work, time constraints and parenting responsibilities. Meaningful parenting indeed lies in guiding children patiently rather than solving every problem for them.

Raju Kolluru, Kakinda

Narcotics network engulfs TG politics

Apropos "TG govt should curb drug menace with Iron Fist" (THI, March 17). The recent drug bust in Telangana has sent shockwaves across the political and social landscape, especially with the reported arrest of a sitting TDP MP from Eluru alongside other politicians and associates. The revelations underscore the alarming spread of the drug menace beyond urban youth into influential circles of power. What was once perceived as a fringe criminal activity has now exposed deep-rooted networks with alleged links to political figures, raising serious concerns about governance, law enforcement, and accountability. The incident has highlighted the urgent need for stricter enforcement, transparent investigations, and political will to combat the threat. If unchecked, such developments could erode institutional integrity and pose a grave risk to society's moral and social fabric.

N Sadhasiva Reddy, Bengaluru-560056

Punish all peddlers

Apropos "TG Govt Should Curb Drug Menace with Iron Fist" (THI, March 17). When elected representatives themselves are found consuming drugs, it signals something more troubling than a law enforcement failure—it reflects a broader erosion of accountability. The Telangana governments EAGLE initiative was a step in the right direction, but as the article rightly notes, ground-level action has been inconsistent. Cracking down on peddlers while ignoring the demand side, particularly among the affluent and politically connected, will only produce selective justice. What is needed is enforcement that does not discriminate by social standing, stronger regulation of farmhouse gatherings, and genuine political will to act against one's own.

A Myilsami, Coimbatore-641402

Wipe out drug menace at the source level

This is further to your editorial "TG govt should curb drug menace with iron fist". It brings out the sad state-of-affairs in social behaviour of the present and past lawmakers who are expected to play a pivotal role in curbing drug menace. Themselves being caught in the act is outright disgusting and condemnable beyond words. This social evil of drug abuse of a variety of variants by the youth of today in Telangana is truly disturbing. The agencies empowered to tackle the menace must be allowed to act fearlessly against all those involved. The supply chain, agents and carriers must be identified so that the authorities can go to the root of this evil and reach the source.

S Lakshmi, Hyderabad

thehansreader@gmail.com

BENGALURU ONLINE

Sri Lankan judge moves HC; Centre, Google raise jurisdiction objections

BENGALURU: A petition filed by Sri Lankan Supreme Court judge A H M Nawaz before the Karnataka High Court has triggered a legal debate on jurisdiction, with Google LLC and the Ministry of Electronics and Information Technology opposing its maintainability. The plea challenges allegedly defamatory and objectionable content published online against the judge. The matter came up before a bench headed by Justice Sachin Shankar Magadam. During the hearing, counsel for Google argued that the petition itself may not be maintainable before the Karnataka High Court. It was submitted that the alleged defamatory content originated in Sri Lanka, while Google is a US-based entity, raising serious concerns about territorial jurisdiction.

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

Urgent need to rethink Telangana's education roadmap

DR SREERAMULLU GOSIKONDA

The Government of Telangana's decision to constitute the Telangana Education Commission (TEC) in September 2024 is a bold initiative. With a mandate to prepare a comprehensive education policy covering pre primary to higher education, including technical streams, the Commission has attempted to chart a roadmap for reform. This effort deserves recognition. Yet, while the vision is ambitious, several blind spots risk undermining its transformative potential. In the 21st century, when education must respond to rapid technological change, global competitiveness, and the demand for inclusive growth, the relevance of such a Commission is undeniable. Its role is not only to set clear standards for quality and align reforms with national frameworks like NEP 2020, but also to ensure accountability across both government and private institutions. Without addressing the welfare of private school teachers—who form the majority of the teaching workforce—the promise of reform will remain incomplete.

A progressive step forward: The TEC, chaired by Akunuri Murali has rightly acknowledged the challenges facing Telangana's education system. Private school enrolment has surged past 60 per cent, while government schools have seen enrolment collapse to just 26 per cent in first grade by 2024-25. Budget allocations have fluctuated, falling to 5.9 per cent in 2021-22 before recovering modestly to 7.55 per

cent in 2024-25. Learning outcomes remain poor, with only 31.5 per cent of Standard-V students able to read a Standard-II text. Against this backdrop, several recommendations stand out. The integration of pre-primary education into the school system is a laudable reform, ensuring continuity in early childhood learning. Equally commendable is the merging of intermediate education with school education, which will reduce duplication and ease student transitions. This reform will also help optimise the use of human resources and existing infrastructure, including laboratories, while reducing the financial burden on the government. In addition, it will not only curb commercialisation of senior secondary education but also create a more conducive atmosphere for students to learn effectively. Junior Lecturers (JL) who currently may lack a B.Ed. qualification should be given sufficient time to complete it, thereby aligning with the required standards for Post Graduate Teachers (PGTs). The emphasis on English-medium instruction across all levels reflects parental aspirations and global realities. The call to embed sports, arts, and socio-emotional learning as core components of schooling is another progressive step toward holistic education. As regards teachers, closing the D.El.Ed programme and restructuring B.Ed. stage-specific degrees is welcome. It acknowledges the systemic failure of teacher education, which has long undermined classroom quality. Similarly, re-emphasising polytechnic education to produce industry-ready diploma engineers is a pragmatic correction.



Blind spots and mistakes

Yet, the Commission's vision is not without flaws. Most strikingly, it does not include experienced educators such as school teachers, principals, lecturers, and professors among its members. Policymaking without the voices of those who live the realities of classrooms risks being detached from ground-level challenges. The TEC also suggested that government teachers' salaries are 'relatively high'. In reality, it is a wrong notion. Salaries are determined by state policy and are not excessive. The move to open Telangana Public Schools with heavy investment is also a questionable proposal. Instead, the state should focus on strengthening existing government schools and improving enrolment. **Ambiguity on NEP 2020:** The TEC's stance on the National Education Policy (NEP 2020) is ambiguous. While it acknowledges certain proposals, such as strengthening pre-school education, it avoids clarity on whether NEP will be fully implemented. This lack of decisiveness can be problematic. NEP 2020 mandates mother tongue instruction at the elementary level, recognising that comprehension matters more than English skills in early grades. The TEC's blanket recommendation of English-medium instruction risks undermining this principle. Moreover, the Commission's report is not available in Telugu, the state's official language. This is a serious oversight. Policy documents must be accessible to all stakeholders, including teachers, parents, and local communities. Promoting Telugu as a mandatory subject in all schools is equally essential to preserve linguistic identity while balancing global aspirations. At the higher education level, the TEC rightly calls for restoring the regulatory integrity of the aided sector. The fee reimbursement scheme should be limited to meritorious students across social categories seeking higher education in private institutions. The Commission also observed that nearly 70 per cent of teaching positions in government-run universities remain vacant, a situation that has had a negative impact on both teaching quality and research activities. However, the Commission fails to address another pressing issue: the absence of reservation for local qualified youth in private higher education insti-

Silence on private school regulation and teachers' welfare:

The TEC's call for decentralised governance, stronger school leadership, and implementation of Section 12(1)(c) of the RTE Act (mandating 25 per cent seats in private schools for marginalised children) reflects a commitment to equity. Yet, the Commission failed to address the underpaid salaries of private school teachers, who constitute 58 per cent of the state's teaching workforce and remain the backbone of its education system. Private schools in Telangana are regulated under the AP Education Act of 1982 and G.O. Ms. No. 1 of 1993, which mandated recognition, infrastructure standards, staff qualifications, fee regulation, and allocation of 65 per cent of income toward staff salaries and benefits. In practice, however, many institutions defy these rules. With nearly two thirds of students enrolled in private schools, leaving them outside effective regulation undermines educational quality and erodes trust. A fair, transparent policy that enforces compliance and protects both teachers and families is essential to correct this prolonged neglect and restore credibility in the education sector. **The way forward:** The Telangana Education Commission has laid out a roadmap that is ambitious and forward-looking. But ambition alone will not suffice. For

INTERNATIONAL EDITORIALS



أناة هي عواقبها قوت، أحب إلى
من عتلة في عواقبها نقت
(أهل بن أبي سفرة)

YOUR DAILY ARABIC PROVERB
*I would rather miss a chance by
deliberateness than gain one through haste.*
Al-Muhallab bin Abi Sufra
(Seventh-century Arab military commander and governor)

Opinion

Gulf states building trust through Iran 'war' response

DR. DANIA KOLEILAT KHATIB

Many articles and social media posts have been published in the last two weeks covering how Arab Gulf states are handling the war — or, more specifically, the unjustified Iranian strikes on their territory. To start with, this is not a war between Iran and the Gulf. This is Iran unjustifiably striking its neighbors. The coverage varies from influencers relaxing on golden beaches to people fleeing the so-called war in panic. However, despite the hardships, the conflict represents an important test — a test in crisis management that the Gulf states have so far aced.

Some who were either uncomfortable with or jealous of the Arab Gulf's success are now saying that Gulf prosperity was built on security and stability. In their perspective, this pillar no longer exists. However, this logic is twisted. To start with, no country — no matter how developed

— is immune from war. The key is how states handle it.

The Gulf states have demonstrated exceptional defense capabilities, with a very high interception rate. Gulf countries have used advanced US-made systems to block attacks on their territory. They also have a good early warning system. And there has been good compliance with safety measures by institutions and the public.

Even though everyone is tense, everything remains functional. Again, many people who are either pessimistic or jealous started speculating about how everyone living in the Gulf would suffer if the Strait of Hormuz was closed. This turned out to be a huge exaggeration. People living in the Gulf cannot notice any difference when they do their grocery shopping. The aisles are well stocked with a variety of perishables. This is because the Gulf had a good contingency plan. Once the strait was closed, all trade was redirected to the ports on the Red Sea. Therefore, as an individual,



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a business or an investor, you can rest assured that Gulf states know what they are doing.

Of course, business has gone down. But we should remember that a similar dip occurred due to COVID-19. After the pandemic, the Gulf bounced back. At that time, the region smartly applied economic boosters to make sure small businesses did not shut down and regular employees did not lose their jobs. They can do the same again if required. The Gulf countries will mitigate the effects of this conflict in the same way they jumpstarted their economies after COVID-19.

There is another factor that is very important for anyone looking to the Gulf to settle or invest: these states are led by rational people, not people driven by their hubris. This is why, despite the various Iranian provocations, the leaders of the different states analyzed the costs and benefits of going to war. They know that they are better off staying out of it.

Again, for those who are pessimistic or jealous and who use dramatic headlines like, "Can the Gulf still act as an airline hub for the world?" I respond that it is likely to emerge stronger. Yes, stronger. Whether you live in the Gulf with your family, are employed in the Gulf, own a business in the Gulf or just have investments in the Gulf, when you see the effectiveness of the crisis management these states have demonstrated, you cannot help but increase your trust in them. Hardships are a test of resilience, strength and decision-making. The Arab Gulf states have proved they can be trusted.

For investors, professionals and even blue-collar workers, for citizens as well as expatriates, what they seek is a system that protects them and allows them to thrive. The Gulf states have provided this ecosystem. Despite the dip these states might be experiencing currently, they have earned trust and this will give them a big boost in the long run.

Gulf countries will mitigate the effects of this conflict in the same way they jumpstarted their economies after COVID-19



The long-standing alignment between political power, corporate interests and media narratives seems to be fracturing

Hiding the truth could spell disaster for region

DR. RAMZY BAROUD

US Defense Secretary Pete Hegseth appears to have little patience for questions that do not conform to his preferred style of declaring unsubstantiated victories, whether against South Americans or in the Middle East.

In a charged press conference on Friday, Hegseth did more than attack journalists for questioning his unverified claims about the course of the war in the Middle East. He singled out CNN, introducing a troubling dimension to the conversation. "The sooner David Ellison takes over that network, the better," he said.

Ellison, a close ally of President Donald Trump and a strong supporter of Israel, is widely considered the front-runner to acquire Warner Bros. Discovery, CNN's parent company. If there was any lingering doubt that such acquisitions are driven by political and ideological considerations, Hegseth's remarks dispelled it.

Such statements reflect a broader shift in how the media is viewed by segments of the US ruling class, particularly under the Trump administration. During both of his presidential terms, Trump has invested much of his public discourse not in unifying the nation but in deploying deeply hostile language against journalists who question his policies, rhetoric or political conduct.

The long-standing alignment between political power, corporate interests and media narratives now seems to be fracturing under the weight of widespread public distrust.

In Israel, however, the situation takes a different form. There, the mainstream media often mirrors the militant posture of the government itself, translating political belligerence into broad public support for war — whether in Gaza, Lebanon, Iran or wherever Prime Minister Benjamin Netanyahu chooses to expand the battlefield.

While there is little that can realistically be done to shift the dominant Israeli



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narrative from within Israel itself, journalists elsewhere carry an immense responsibility. They must adhere to the most basic standards of journalistic integrity now more than ever.

This responsibility does not apply only to journalists in the US or across the Western world. It applies equally to journalists throughout the Middle East. After all, it is our region that is being drawn into wars not of its own making and it is our societies that have the most to gain from a just and lasting peace.

Over the past two years, we have seen just how difficult it has become to convey reality from the ground. Journalists have confronted censorship, propaganda campaigns, algorithmic suppression, intimidation and violence.

Yet the consequences of this information crisis are far from abstract. When truth disappears, civilians suffer in silence. Political decisions are justified through distorted narratives. Wars become easier to prolong when the public is denied the

facts necessary to challenge them.

At this moment, journalists, intellectuals and people of conscience must speak the truth in all its manifestations.

We reject war. But for wars to end, truth must be spoken openly and without hesitation. Journalists must be allowed to work without fear or intimidation. Media ownership must not become a mechanism of control and censorship.

Politicians and generals risk reputational damage, the loss of office or perhaps the disappearance of a generous holiday bonus if their wars fail. For the people of the Middle East — and for all victims of war — the stakes are far greater.

For that reason, gratitude is owed to the courageous individuals who continue to speak truth to power, to those who insist on unity during moments deliberately engineered to produce division, and to those who understand that honest journalism is not merely a profession. It is a moral obligation.

Opinion

Al-Aqsa Mosque closure requires a collective response

DAOUD KUTTAB



or even destroying the Al-Aqsa precinct, rhetoric that Arabs and Muslims view as an unacceptable escalation with potential cross-border repercussions.

The risk is not only about a physical act but about the way language and policy can erode trust, inflame communities and undermine prospects for a sustainable peace. The closures — perceived by many as a selective enforcement of access — also highlight broader questions about governance, sovereignty and who sets the terms of worship in a city claimed by multiple faiths.

The broader implication is clear: the world is watching how the region balances security, sovereignty and sacred space in a city revered by Jews, Christians and Muslims alike. Condemnations from Jordan, the Arab League, the OIC and the African Union, backed by a coalition of states including the UAE, Türkiye and Egypt, reflect a shared commitment to safeguarding the integrity of Jerusalem's holy sites and to upholding international law. These statements are more than political posturing; they are a call for accountability and a reaffirmation that religious freedoms are not negotiable, even amid shifting geopolitical sands.

Condemnations from across the Arab and Muslim worlds have been swift and united, underscoring a shared conviction that security concerns cannot justify eroding long-standing protections for worship. A bloc of eight states — most notably the UAE, Indonesia, Pakistan, Türkiye, Saudi Arabia, Qatar and Egypt — pointed to the closure as a violation of international norms that disregards the principle of free worship.

The Jordanian Foreign Ministry described the measure as a flagrant breach of international law, the historical and legal status quo in Jerusalem, and the unimpeded right to worship.

Ultimately, the test is whether regional leaderships can translate these condemnations into a sustained, practical framework for protecting worship. This means a credible dialogue that calls for proper enforcement of access rights and a refusal to permit security narratives to eclipse the spiritual needs of worshippers. It means preventing future measures that turn a place of prayer into a theater for political contest or a metric of regional power. And it requires steadfast support for all people of faith in a city whose significance transcends borders.

The unilateral decision by Israeli police to close Al-Aqsa Mosque — Islam's third-holiest site — has ignited a fresh wave of regional concern and international scrutiny. The measure comes at a moment of heightened tension in a city that has long been at the heart of competing religious claims. The closure of the mosque during the last 10 days of the holy month of Ramadan is unprecedented; it has not happened since the Israeli occupation began in 1967. Many are concerned that sinister motives lie behind the restrictions on worship in the large compound.

On the ground, the reality is as stark as it is troubling. Israeli security closed Al-Aqsa's gates to worshippers during Ramadan, when access, communal prayer and collective fasting define the spiritual rhythm of millions. Israeli authorities have argued that the Old City's holy sites must be closed because of the broader war dynamic surrounding them. Yet Palestinians point to a troubling inconsistency: while access to the Old City is restricted, mosques outside its walls remain open under

different parameters and the wider system of movement controls continues to influence who can reach the compound.

In the Arab world, foreign ministers and senior regional bodies frame the closure not merely as a local security tactic but as a test of the norms protecting sacred spaces in Jerusalem and, more broadly, as a challenge to the rights of worship across faiths. Their message is clear: sacred spaces should shield worshippers, not be pawns in a political contest.

The general secretariat of the Arab League issued a formal expression of deep concern that continuing closures threaten the freedom of worship and destabilize Jerusalem's delicate sacred order. In a joint demarche, the secretariats of the Organization of Islamic Cooperation, the Arab League and the African Union Commission affirmed Jerusalem's central religious status and condemned the closures as grave violations of international law and the status quo.

What makes this moment particularly piercing is the convergence of political rhetoric and religious symbolism. Public discourse within Israel occasionally entertains extreme narratives about altering

What makes this moment particularly piercing is the convergence of political rhetoric and religious symbolism



The world is watching how the region balances security, sovereignty and sacred space in a city revered by multiple faiths

UK takes step toward protecting Muslims from hate

CHRIS DOYLE



Anti-Muslim hatred is particularly prevalent on the political right. The Conservative Party has long had a serious issue with Islamophobia, which it has failed to deal with. But centrist parties such as Labour do not have a great record either.

The far right has screamed that the new definition gives Muslims a unique special status. This is far from true. The government adopted the controversial International Holocaust Remembrance Alliance's working definition of antisemitism 10 years ago. Considering that there are far more British Muslims than Jews, one has to question why it has taken so long to agree a definition to protect Muslims.

Others argue that this is a blasphemy law via the back door. Yet the definition could not be clearer that it is to protect hostility against a people, not to penalize those who criticize the specifics of a faith. It tackles violent and offensive conduct against Muslims just for being Muslims.

A definition alone will never be enough, nor will an anti-Muslim hostility tsar. It helps to identify the problem and the challenge but will not cure the problem.

Britain's political leaders must lead by example and ensure that the public understands the clear difference between the

majority of law-abiding, peaceful Muslims and the minority of Islamist extremists. The record was better on this 20 years ago.

It is time for a greater focus from politicians and the media on the terrific achievements of British Muslims and a bigger effort to ensure they are very much a positive part of British society. Polls consistently show that British Muslims feel more loyal to the UK and are more

pro-democracy than the rest of the population. British Muslims are increasingly registering achievements in all walks of life. There are today more elected Muslim politicians and more successful businessmen, journalists and cultural figures than ever before.

Other countries in Europe and America should also take note. They too have to deal with the challenge of rising anti-Muslim hatred.

British Muslims have a chance to build on this. The definition should help but must not be abused. Reporting mechanisms can be further professionalized. Constructive efforts will ensure institutions adopt and implement the definition. Collaborating further with other communities that suffer from hate crime is essential.

Many British Muslims are told to go back home, as if they are foreigners and not genuine citizens



The Conservative Party has long had a serious issue with Islamophobia, which it has failed to deal with

Finally, after years of foot-dragging, the UK government has published an official definition of anti-Muslim hostility. This sparked howls of derision and anger from the right, perhaps fearful this would restrict their favorite pastime of unashamed Muslim bashing.

This is a nonstatutory definition. It is not legally binding but it can assist government agencies in identifying hatred and discrimination. This is to enhance social cohesion at a time when, as in many other societies, it is at risk of breaking down.

It is the result of the considered efforts of a working group that the Labour government set up to look into the matter and propose a definition. This means that the definition can be enhanced to answer any concerns. A tsar will be appointed to oversee this.

Why is it needed? Government figures show that hate crimes targeting Muslims are at a record high. Over the last 12 months, they have increased by almost 20 percent to 4,478 crimes. These, of course, only relate to those that are reported. As ever, many attacks are directed against Muslim women or those perceived to be, including the ripping off of hijabs. Many British Muslims are told to

go back home, as if they are foreigners and not genuine citizens.

Cast one's eyes across recent news headlines in Britain and incidents are not hard to find. Last month, a man was arrested for entering Manchester Central Mosque with an array of weapons. At a recent Leeds United football match, many people in the crowd booted when the game was paused to allow Muslim players to break their fast. There have also been a

host of smaller incidents, such as when a man placed bacon on the glass door of a Bristol mosque during prayer time.

In much of the public discourse, especially online but also in the media, Muslims are often treated as a single group with negative characteristics. Stereotypes of Muslims as uniquely violent, anti-Western or anti-women are typical.

The defeat of the Labour Party in a recent historic by-election in Manchester, won by the Green Party, was largely blamed on "the Muslim vote," as if there was one single bloc. The reaction of Conservative Party leader Kemi Badenoch was one of the most alarming. She said: "Labour created the monster of harvesting Muslim community bloc votes and yesterday that monster came back to bite them."

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OPINION

EDITORIAL

China must manage AI agent risks while fostering innovation

China may be having its own TikTok moment. Just as Americans went crazy over the Chinese-made social media platform, mainland Chinese are in a frenzy to use OpenClaw, an American-owned artificial intelligence (AI) agent that promises to make the new tech accessible to the masses. And just like Washington, Beijing is worried about potential security risks and privacy breaches. Yet the business and tech potential of AI agents is too great to ignore.

On one hand, many local governments recognise opportunities that dovetail with national development goals. On the other, the central government sees risks that need to be managed. These are really two sides of the same coin and require careful management.

OpenClaw was acquired by market-dominant OpenAI in February. The AI agency programme promises to perform tasks and offer solutions for people. In China, unsurprisingly, many end up using it to pick stocks and advise on feng shui. Tech firms such as Hong Kong-listed MiniMax and Zhipu that offer OpenClaw tools saw their share prices rise. Stockbrokers are under pressure to adopt AI capabilities for clients. In major cities, people are seen queuing outside tech companies to install OpenClaw.

Chinese cybersecurity giant 360 Security Technology warns that the country is home to 40 per cent of global assets linked to OpenClaw. By any measure, that is an unusually high tech and financial exposure for any country.

So just as quickly, many are uninstalling it after China's cybersecurity agency issued no fewer than two nationwide warnings about security and data risks tied to OpenClaw. Mainland and Hong Kong governments have warned civil servants against its use after some mainland local government departments and tech companies adopted the AI agent amid a nationwide frenzy.

The problem is that OpenClaw can access an unusual amount of personal data from people's electronic devices. However, it may be too late for many to uninstall it. Some experts warn leaks may have already occurred and uninstalling it may not guarantee a clean break. Leading Chinese tech firms such as Alibaba (owner of the SCMP) – which launched the more secure JVS Claw – are rushing out competitive models. Together, they can form an ecosystem to localise the new tech and neutralise foreign threats. As Chinese commercial entities, they can work closely with regulators to better protect users.

Beijing sees opportunities but also understands the risks. AI agents can benefit ordinary people who are not experts. The challenge is for officials to create a regulatory framework that balances security concerns with incentives for growth and development in a highly competitive tech industry.

Digital payments can lift image of taxi sector

A quiet revolution is sweeping the Hong Kong taxi industry. It will become official on April 1, when the replacement of cash-only settlement of fares with electronic payment options will be mandatory. The leap into the 21st century is overdue. The industry has shot itself in the foot with resistance to technology that has been bad for business, when it is already battling a perception of poor service.

That said, the change is a landmark of its kind when it comes to overcoming technophobia. About two-thirds of Hong Kong's 46,000 active taxi drivers are aged 60 or above and not easily wowed off cash transactions in which they often benefit from tipping – or being urged to keep the change. Now, well before the deadline, it emerges that the industry is well placed to meet the requirement to install at least two e-payment options, with about 90 per cent of the city's taxi drivers already registered with such platforms.

Hong Kong Taxi Council chairman Ryan Wong Cheuk-pong says drivers stand to benefit from e-payments through fewer fare disputes and not having to worry about a lack of change. "Many residents and visitors are now used to not carrying cash, so the lack of electronic options has stifled the industry's development," he said. "When residents do not carry cash... [it] dampens willingness to take taxis."

Chau Kwok-keung, chairman of the Hong Kong Taxi and Public Light Bus Association, said the transition meant cabbies would inevitably lose small "tips" earned by rounding up fares. "Those minor amounts are significant for some drivers where every dollar counts. But we have no choice but to keep pace with the times."

As part of the effort to raise the taxi industry's quality and image, the new law stipulates that taxi drivers must provide at least one QR code-based option – such as AlipayHK, WeChat Pay HK or BoC Pay – alongside a non-scanning alternative, including Octopus, credit cards or the Faster Payment System.

An aged workforce has kept the city's taxi industry going. At the same time, it needs to attract younger drivers to enhance safety and its image. The number of taxi-driving licence holders under 40 rose by 50 per cent to more than 18,000 between 2019 and last year. Hopefully, digitalisation will add momentum to that trend.

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HARRY'S VIEW ON A COURIER COMPANY'S FUEL SURCHARGE > A3



Region of resilience

Nicholas Spiro says while higher fuel prices threaten global tourism, Asia's crisis-hardened hotel sector is ready to withstand shocks from the Iran war

As the war in the Middle East enters its third week, hopes for a swift end to the conflict have evaporated. Assessments of the economic consequences are much more dire than they were even a week ago.

In a report on Thursday, the International Energy Agency said the war "is creating the largest energy supply disruption in the history of the global oil market".

Iran's de facto closure of the Strait of Hormuz – a critical maritime chokepoint that handles around one quarter of global seaborne oil trade – has led to an acute shortage of products such as diesel, jet fuel and liquefied petroleum gas "that cannot be consumed simply because they are not available," JPMorgan said.

Asia's economies are bearing the brunt of the supply disruptions given their heavy reliance on energy imports from the Middle East. Before the war erupted, the region imported about 13.2 million barrels of oil a day through the Strait of Hormuz, amounting to half of Asia's total crude imports.

"A central question is how long importers can sustain fuel supply before shortages deepen," JPMorgan said.

Asian airlines are at the sharp end of the energy shock because of their failure to adequately hedge against rises in oil prices, much less against increases in fuel costs, which account for around 20 per cent of airlines' operating expenses. This has forced carriers to raise ticket prices and increase fuel surcharges across a range of routes.

With the rise in the price of jet fuel far outpacing the increase in oil prices, the prospect of much sharper rises in airfares – driven in part by the surge in demand for long-haul flights that bypass the Middle East – heightens the risk of a renewed downturn in tourism.

The energy crisis comes just when international tourist arrivals in the Asia-Pacific have more or less

returned to pre-pandemic levels. Last December, the International Air Transportation Association projected that airlines based in the region would lead global passenger growth this year for the second year running, underpinned by strong growth in China, India and Vietnam.

Yet uncertainty over the duration and severity of the energy crisis makes forecasting perilous. Before the war broke out, Thailand's government expected overseas visitors to reach 36.7 million this year. Now its best-case scenario is that arrivals are 2 per cent below target. In its worst-case scenario of a prolonged war lasting at least three months, they could be as much as 25 per cent lower.

Long-haul passengers, the bulk of them from Europe, accounted for 30 per cent of arrivals last year. With Gulf hubs constituting more than a third of air travel between Europe and Asia, the pressure on Thailand's tourism sector is intensifying.

However, Thailand is no stranger to crises. While suffering a succession of domestic and external shocks, the country still managed to attract 33 million visitors last year despite a 33.6 per cent fall in arrivals from China, its biggest source market.

Asia's tourism industry as a whole has proved remarkably resilient to the series of severe blows in the past several years, with some countries, in particular Japan, having gone from strength to strength. The shock-absorbing powers of the region's hotel sector have been on full display.

"The never-ending geopolitical chaos has become the new normal. The [hotel] sector is somewhat desensitised to it," said Anurath Ramchandran, head of advisory and strategic transactions for hotels and hospitality in Asia at CBRE.

In a report in October last year, JLL said that "in an investment climate with inflationary pressures and economic volatility, hospitality is not a bad place to be.

The sector has shown how quickly it bounces back from challenges".

Although the economic fallout from a prolonged energy crisis poses a more acute threat to international travel and tourism, Asia's hotel industry benefits from multiple tailwinds.

One of them is the strong role of domestic and intraregional tourism. While several countries in Asia have large domestic tourist markets, China is in a different league. Airline passenger traffic and capacity on domestic routes had already recovered to 2019 levels by early 2023. During the Spring Festival season this year, Chinese travellers took a record number of domestic trips.

In Thailand, short-haul flights within the region drive passenger volumes. Arrivals from India were up nearly 17 per cent last year, while 4.5 million Malaysians visited the country, on a par with arrivals from China.

Diversified source markets within Asia have also helped Japan's tourist sector amid a diplomatic row with China that caused a sharp fall in visitor arrivals from the mainland. While the number of Chinese visitors fell 60.7 per cent year on year in January, arrivals from South Korea rose 21.6 per cent to 1.1 million, higher than the number of Chinese arrivals in January last year.

Other tailwinds include significant financial buffers built up in the past few years amid the sharp rise in Asian hotels' average daily rates, which have offset slower growth in occupancy levels. Even some of the headwinds have turned into tailwinds. The surge in construction costs has exacerbated supply constraints, benefiting owners of existing hotels.

Ramchandran said while there will be "pain in pockets" of the market heavily reliant on Middle Eastern tourists, the fact that even more vulnerable markets like Thailand "clawed their way back" from previous shocks bodes well for the longer-term outlook.

Asia's crisis-hardened hotel industry can withstand the economic damage from the Iran war.

Nicholas Spiro is a partner at Lauressa Advisory

Iran war shows urgency of green shipping transition

Ryan Ip and David Yu say as a global maritime hub, the city must speed up green fuel bunkering and strengthen its marine war-risk insurance business

The war in Iran, culminating in the de facto closure of the Strait of Hormuz, has again exposed the world's energy and maritime sector to acute vulnerabilities. The spike in oil prices and surging freight rates may grab headlines, but beneath these shocks lie fundamental questions about Asia's – and Hong Kong's – energy security, the resilience of shipping risk management and the urgent need to transform our maritime industry for a greener future.

The Strait of Hormuz is the jugular vein of the energy trade. Roughly one-fifth of global oil and liquefied natural gas (LNG) passes through its narrow waters. As conflict flared in Iran, shipping companies diverted vessels around the Cape of Good Hope, lengthening journey times and reducing global shipping capacity.

The result: higher shipping and energy costs that hit businesses and consumers worldwide. These shocks are not one-offs. Years of sanctions on Iranian and Russian fleets had trimmed global tanker capacity. With vessels stranded on both ends of the strait, market jitters quickly translate into price increases.

Asia's giants are disproportionately exposed to oil transiting through the Strait of Hormuz. Japan got 90 per cent of its crude from the region. South Korea about 70 per cent. By comparison, China's energy security strategy – diversifying imports and expanding renewables – has reduced its direct reliance.

According to the World Bank, imported energy covers just above 20 per cent of China's consumption. That relative insulation has rippled through markets; stock indices in Japan and South Korea reacted with

greater volatility than those in Hong Kong and mainland China.

Hong Kong is a beneficiary of this mainland connection. The city's 2024 Energy Statistics Report shows that over 80 per cent of its natural gas, LPG, aviation petrol and kerosene imports originate from mainland China. Still, about half of Hong Kong's total energy import is destined for international bunkering. Any severe disruption places our reputation as a global shipping hub at risk.

If the Strait of Hormuz closures highlighted the world's energy bottlenecks, the insurance market's response was equally telling. Leading providers from Gard and Skuld to the London P&I Club and the American Club cancelled war risk cover and raised premiums by up to 10 times, essentially weaponising their market dominance to serve only the lowest-risk clients and reaping profits from instability.

Most ships, except for certain Chinese vessels allowed to transit through the Strait of Hormuz, were not insulated from such inflating freight rates.

This situation validates Hong Kong's forward-looking effort to establish a dedicated marine war-risk insurance pool, as announced in the chief executive's 2025 policy address. Such a pool has shown potential in providing vital backstop capacity for Hong Kong and mainland Chinese shipowners and in diluting London's historic dominance in marine insurance.

As risk pricing becomes a tool of geopolitical influence, Hong Kong must give shipowners reliable alternative options to reinforce its standing as a maritime

hub. Hong Kong can leverage its ties with the Middle East to further expand the source of funds and participating insurers for the war-risk pool. This would allow the city to provide coverage to a wider range of ship-owners and enhance its role in marine insurance.

Disruption in the Strait of Hormuz will not be the last such shock in our lifetimes. For Hong Kong, the lesson is clear: energy security cannot rely on any single corridor or risk market. Our reliance on imports makes us vulnerable not just to physical disruptions but to financial ones.

This should be a catalyst for Hong Kong to accelerate the transition towards becoming Asia's leading green fuel bunkering hub. Marine sectors worldwide are innovating with alternatives such as biofuels, ammonia and hydrogen. The administration deserves credit for its efforts since the release of the Action Plan on Green Maritime Fuel Bunkering. In the past year, the city has completed 16 LNG and 110 bio diesel bunkering operations, involving a total of 220,000 tonnes of green marine fuel. Earlier this month, Hong Kong conducted its first green methanol bunkering.

Embracing green fuel infrastructure not only aligns with its 2050 carbon neutrality pledges but will also solidify Hong Kong's maritime sector as a future-ready, sustainable stronghold.

The Iran war's market impact should be heeded as a call to action. Hong Kong's shipping and energy industries must invest in risk sharing, diversify fuel sources and position the city as an indispensable partner in the world's low-carbon transition. Our future security – and prosperity – depends on it.

Ryan Ip is vice-president of Our Hong Kong Foundation and executive director of the Public Policy Institute. David Yu Chak-wai is a researcher at Our Hong Kong Foundation

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OPINION

Arming for a vacuum

Andy Tian Shichen says fraying of the transatlantic bond is driving Europe's rearmament push

With the Middle East ablaze and war in Ukraine showing no sign of respite, a stark new consensus is hardening in Paris, London and Berlin that Europe must rearm. Recently, French President Emmanuel Macron signalled a pivotal shift in deterrence by announcing an increase in the nation's nuclear warheads and a "forward deterrence" plan.

its posture in the Indo-Pacific. Even in the current war with Iran, most European governments—with the notable exceptions of Spain and Norway—have aligned themselves politically with the US. But Europe today is not just divided over where its threats come from: it is trapped in a security architecture—Nato—that is increasingly at odds with its interests. The perception of Russia is the primary fault line. While the Baltic states and eastern Europe view Moscow as a threat, many in western and central Europe are sceptical. They see a Russia bogged down in a protracted conflict in Ukraine, lacking the capacity or the intent for a deep incursion into the heart of the continent.

on a security architecture to address threats that the leader of that very architecture is creating? Beneath the debate over Russia and the anxieties of a volatile US alliance lies the uncomfortable dilemma: Europe's greatest challenge may not be a foreign invader, but its internal erosion. A growing strand of opinion suggests Europe's first task is not to stockpile weapons but to restore its sovereignty in substance. This means reversing decades of deindustrialisation, regaining effective control over borders and ending a structural dependence on Washington that spans from battlefield to the boardroom.

plans cannot answer: can Europe truly be "secure" if its economic foundations and social cohesion are crumbling from within? If security is ultimately about the preservation of a political community, then Europe must decide what kind of community it seeks to preserve. Until that question is confronted honestly, the rearmament debate risks mistaking symptoms for causes. Finally, there is the "whole-of-society" challenge. For the average European citizen, the trade-off between guns and butter is not a theoretical or academic debate: it is a matter of daily survival. In an era of economic stagnation, asking the public to accept higher taxes or gutted social services to fund a military expansion lacks democratic legitimacy. Without a clear consensus on whether the primary threat is Russia, a systemic rivalry with China or American isolationism, the push for rearmament feels less like a strategy and more like an expensive reflex. Spending is a tool, not a framework. Europe must decide what political outcome it is trying to achieve. Does it seek containment of Russia, strategic independence from the US, or a renewed, subordinate dependence? Rearmament will only find its meaning once Europe stops buying weapons to satisfy old alliances and starts building an architecture that reflects its new, multipolar reality. Until Europe identifies its genuine threats, it is merely arming itself for a vacuum.

How can Europe rely on a security architecture to address threats that the leader of that very architecture is creating?

From this perspective, the "Russian threat" functions as a convenient mask for systemic failures. Europe's strategic autonomy was arguably surrendered to energy miscalculations and industrial decline long before the current crisis. Perhaps most dauntingly, demographic imbalances and strained integration models are reshaping European societies faster than the political centre can hold. Whether one agrees with this diagnosis or not, it forces a question that procurement

Captain (Retired) Andy Tian Shichen is founder and president of the Global Governance Institution and director of the Centre for International Law of Military Operations in Beijing

LETTERS

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Nepali youth are joint partners in the future of this city

The Hong Kong Initiative for Diversity recently hosted a forum, "Building Bridges: Challenges and Solutions for Nepali Residents in Hong Kong," bringing together educators, academics, entrepreneurs, Nepali community members and local Chinese residents for an honest discussion about inclusion. With around 30,000 people, the Nepali community is Hong Kong's sixth largest ethnic minority group. Over a third of Nepalis in Hong Kong were born and raised here; many are descendants of Gurkha soldiers who helped defend this city. Their history and contribution deserve recognition, not neglect. Yet many Nepali residents continue to face systemic barriers in education, employment and social integration. Nepali youth have one of the highest school dropout rates among ethnic minorities, and unemployment and drug abuse are a concern. Parents, often with low educational attainment and working long hours in low-wage jobs, lack the time, resources and social capital to support their children's learning. This fuels a vicious cycle: educational disadvantage leads to poor qualifications, which in turn mean unstable, low-paid work and continued marginalisation. What can be done? First, government and schools should invest in targeted, sustained support for Nepali students: high-quality, culturally responsive Chinese language teaching, after-school homework support and school-home liaison officers who speak Nepali. Second, employers and public bodies should expand apprenticeships and internship schemes specifically accessible to youth from different ethnic communities, including Nepalis, so that qualifications translate into real opportunities. Third, NGOs and foundations can fund "family capital" programmes that equip parents with basic education navigation skills, parenting support and information in their own language. Finally, the government should set clear outcome targets (on school dropout, employment and drug use) and regularly publish disaggregated data so progress for Nepali youth can be tracked transparently. If Hong Kong is serious about being an international, inclusive city, then Nepali young people must be seen not as a problem to manage but as partners in our shared future.

Dr John Tse Wing-ling, Hong Kong Initiative for Diversity

Legislation required to curb bullying in the workplace

Workplace bullying is a salient issue that undermines employees' well-being, productivity and organisational culture. In Hong Kong, although laws exist to address discrimination and harassment, there is currently still no specific legislation targeting workplace bullying. This gap leaves many employees vulnerable to repeated intimidation, verbal abuse, shouting and exclusion, often with very limited avenues for justice. Bullying is not just a personal conflict. It carries clear economic and psychological consequences. Victims frequently experience stress, anxiety and depression, which contribute to absenteeism and reduced performance. Companies, in turn, face higher turnover, reputational damage and weakened morale. Without a clear legal framework, many organisations overlook, minimise or mishandle complaints, allowing toxic behaviour to take root. Legislation would provide a much-needed structure for prevention, accountability and redress. It could clearly define bullying behaviours, establish safe reporting mechanisms and require employers to implement proper anti-bullying policies. Countries such as Australia have already taken steps to address workplace bullying, showing legal intervention can foster safer and more respectful work environments. Hong Kong prides itself on being a global business hub. To maintain this reputation, we must ensure that workplaces are not only competitive but also humane. Bullying—whether it is shouting, shaming or other hostile behaviour—should never be tolerated. Legislation is a necessary step to protect employees, strengthen organisational resilience and uphold Hong Kong's commitment to fairness and dignity at work.

Donald Chong, Mid-Levels

More English teachers need some support in the classroom

I refer to 'Teachers' test scores may not reflect classroom reality' (March 9), which draws attention to the woes of English teachers, especially those for whom English is not their first language but who obtain an English language proficiency qualification. These teachers might struggle to find the right words when teaching, which can adversely affect their confidence and the classroom dynamics. Tolerance, support and unity are needed for classes to be run smoothly.

Edmond Pang, Fanling



Some teachers are in need of support and tolerance for their classes to run smoothly. Photo: Shutterstock



Security and 'one country, two systems' go hand in hand

Cui Jianchun says Beijing's latest white paper on Hong Kong has helped clear misconceptions

On February 10, China's State Council Information Office released a white paper titled "Hong Kong: Safeguarding China's National Security Under the Framework of One Country, Two Systems". This is the third white paper issued by the central government on Hong Kong-related affairs since 2014. It reviews Hong Kong's efforts in safeguarding national security, elaborates on the central government's stance on the city's role in maintaining national security and summarises the experience gained under "one country, two systems". The document holds significant and far-reaching importance for clarifying misconceptions, building consensus and ensuring the high-quality development of the one country, two systems policy with a high standard of security. First, the white paper provides a chronological overview of the struggle to safeguard national security in Hong Kong. Ensuring national security is a top priority. The struggle to safeguard national security in Hong Kong is persistent. During the transitional period prior to the return of Hong Kong, the Chinese government resolutely guaranteed the implementation of one country, two systems.

Anti-China agitators had long been involved in acts and activities endangering national security. The most severe was the 2019 turmoil, which evolved into a colour revolution and posed the greatest challenge for the one country, two systems practice since the return of Hong Kong. Second, the white paper outlines the framework and the responsibilities and measures of the central government and the city in safeguarding national security. The central government bears the fundamental responsibility for maintaining national security in all local administrative regions, including Hong Kong, while the city shall fulfil its constitutional responsibility for safeguarding national security. In response to the 2019 turmoil in Hong Kong, the central government assessed the situation and introduced a series of decisive measures which put an end to the chaos. In 2020, with a National People's Congress (NPC) decision and follow-up legislation by its Standing Committee, the Hong Kong National Security Law was passed and included in Annex III of the Basic Law, ending the prolonged absence of a national security shield in Hong Kong.

In 2021, the NPC made another decision and authorised its Standing Committee to amend Annex I and Annex II of the Basic Law, improving the methods for selecting the chief executive and forming the Legislative Council. This fully implemented the principle of "patriots governing Hong Kong" and remedied loopholes and deficiencies in the previous electoral system. Since the implementation of the Hong Kong National Security Law, the chief executive and the Hong Kong government have acted on their responsibilities and strived to deliver solid results in ensuring the law's application. Hong Kong's executive, legislative and judicial branches have performed their respective functions to actively prevent, halt and punish all acts and activities that endanger national security, especially through the passage and enforcement of legislation required by Article 23 of the Basic Law. With the Safeguarding National Security Ordinance, Hong Kong has finally fulfilled its constitutional responsibility. Hong Kong has also improved its local legal system, carried out strong law enforcement and judicial measures, and made progress in advancing public education on national security, all to safeguard and further strengthen the national security shield. Third, the white paper details the practice, historic achievements and insights gained in safeguarding national security under one country, two systems. Through the concerted efforts of the central and Hong Kong government, China's national sovereignty, security and development interests have been effectively protected, and security and the rule of law

have been effectively safeguarded. At the same time, Hong Kong's governance efficiency has been further enhanced, social order has been restored and the business environment has improved. Hong Kong has entered a new phase of stability and prosperity with the well-being of its residents ensured. On the new journey in this new era, we must adhere to a holistic approach to national security as its guiding principle, and grasp the practical requirements of safeguarding national security under the framework of one country, two systems. This means upholding the central government's fundamental responsibility and Hong Kong's constitutional responsibility, keeping the power to govern Hong Kong firmly in the hands of patriots and respecting and ensuring human rights. Furthermore, we must safeguard security under the rule of law, follow a holistic approach to development and security, and safeguard security with greater openness, thereby creating a high standard of security for high-quality development of the one country, two systems policy. Hong Kong is poised for broad development prospects and a promising future. We firmly believe that by safeguarding a high standard of security, Hong Kong will surely overcome all kinds of risks and challenges, achieve lasting peace and long-term prosperity and better integrate into and contribute to the overall development of the country. Doing so will ensure one country, two systems continues its steady and sustained progress.

Cui Jianchun is Commissioner of the Ministry of Foreign Affairs of the People's Republic of China in the Hong Kong Special Administrative Region

Hong Kong has entered a new phase of stability and prosperity with the well-being of its residents ensured

OPINION

Iran Will Define Trump's Legacy



GLOBAL VIEW
By Walter Russell Mead

When overwhelming force meets resistance, the result is often explosive. That is what we are seeing this week as President Trump's Operation Epic Fury encounters Iran's determination to resist at all costs. From all accounts, Israeli and American military strikes are meeting and even exceeding their goals of disassembling the regime's infrastructure. Yet Tehran continues to disrupt oil traffic in the vital Persian Gulf even as it lashes out at its neighbors.

Two weeks in, it appears to be a stalemate. Devastating airstrikes have not broken the mullahs' will to resist. The effective closing of the Strait of

nuclear materials, the consequences for Mr. Trump's power and prestige, at home and abroad, will be profound. "Trump always chickens out" won't merely be an insult his enemies hurl at him. It will be carved on his tombstone.

Yet to advance further into the chaos of an escalating and widening war holds other risks. Unless American forces can break Iran's stranglehold on the Strait of Hormuz, the economic consequences of the war will inexorably grow. Potential attacks on Iran to achieve concrete objectives, whether to remove its stockpiles of enriched uranium or to occupy its oil facilities on Kharg Island, require boots on the ground. The more deeply Mr. Trump commits himself to the war, the greater the reputational cost of disentangling from it should success prove elusive.

The Gulf Arab states have discovered how fragile their wanted prosperity is. Their wealth cannot protect them from Iranian missiles, drones or blockades. The wars raging across the region since Hamas's attack on Israel on Oct. 7, 2023, make investors cautious about committing large sums to infrastructure and facilities in a potential war zone. They cannot prosper without American guarantees, but those guarantees come at a price.

For Europeans, the harsh light of war illustrates their powerlessness and dependency. The Ukraine war has combined with poorly conducted green energy policies to raise energy costs so high that they threaten the competitiveness of European in-



dustry. A prolonged war in the Gulf would have grave consequences for struggling European Union economies, but years of military underinvestment leave those countries with few options for affecting the outcome of the war.

At times like this, Europeans need to speak with one voice to have any effect on events, but the stress of war seems to be driving European capitals apart rather than pulling them together.

Spain has denounced the American-led war. Germany has tilted toward Washington, although it is firmly rejecting requests for German naval assistance. France and Italy are asking Iran for help in getting oil shipments through the Gulf. Belgium's prime minister has called for normalizing relations with Russia to restore Europe's access to cheap natural gas.

Indo-Pacific countries are equally shocked by their vulnerability to events they can't control. The U.S. presented the war as a fait accompli to its Indo-Pacific allies; they

have been left to cope with the consequences of decisions that affect them profoundly, but with little ability to influence Washington's policymaking. From Pakistan to Korea, no region on the planet is more dependent on Middle East energy than the Indo-Pacific.

The growing costs and complexities of the Iran war pose the greatest threat yet to Mr. Trump's unorthodox presidency, but he still has some cards to play. His intuitive grasp of the logic of power, his genius for improvisation, and his willingness to adapt dramatic and unconventional approaches equip him with skills that a war president needs.

Crucially, the shock waves the war has sent around the world reinforce the importance of an American victory to stakeholders far and near. Ceding control of a vital waterway and of resources necessary for the prosperity of billions of people to a fanatical and bloodthirsty regime is a recipe for permanent crisis and upheaval.

Mr. Trump did not make the public case for the war before he launched it. Nor did he consolidate the relations of trust and solidarity with allies that would encourage them to support him in the hour of need. Both omissions have cost him in these early weeks of what could well be the defining test of his presidency. But he has a solid case to make, and to the degree that the American people and our allies abroad understand the stakes, he can find the support that he needs to finish the mission.

BOOKSHELF | By Matthew Rees

In Praise Of Sweat

Hotwired

By Bill Gifford
Harper Wave, 320 pages, \$32

“We are, hands down, the sweetest animal on the planet,” writes Bill Gifford in “Hotwired.” His splendid book is devoted to a topic—the health benefits derived from exposure to high temperatures—that could be tedious in the wrong hands. Mr. Gifford, though, has exceptional skills as a reporter and storyteller, and he deploys them here to deliver a perspective that may change the way readers think about the otherwise unpleasant condition of feeling damp on a warm day.

Mr. Gifford is a co-author of the bestselling book “Outlive” and a contributing editor at Outside magazine, for which he has written frequently about health and fitness. He begins “Hotwired” with an accessible tour through the biology and evolutionary history of perspiration. There are two kinds of sweat glands in mammals: apocrine and eccrine. The vast majority of those in humans are the eccrine variety; adults have between two and four million in all. These glands are concentrated on the hands and feet and are missing from only a few places on the human body (our lips, for example). Eccrine sweat glands perform a critical function: cooling the body via evaporation. Mr. Gifford characterizes this adaptation, which dates back millions of years, as “evolution’s nuclear weapon.” It enabled our ancestors to forage for food and water during the hottest period of the day, with sweat to keep them from overheating. The big cats and other hunters that these foragers feared had many fewer eccrine sweat glands than humans; predators had to stay cool in the daytime by hunkering in the shade.

Drawing on the work of David Carrier, a biology professor at the University of Utah, Mr. Gifford explains how the same principle helped humans become more effective predators themselves. “Our power of thermoregulation meant that we... were able to operate at higher levels of exertion in hot conditions, and sustain a higher body temperature, than nearly all other mammals.” As a result, humans could devote hours (or even days) to pursuing an animal. It would eventually need to stop for rest, at which time it could be killed.

Our tolerance for extreme temperatures may be connected to broader health benefits of heat. Mr. Gifford cites several studies that show the value of spending time in a sauna, including one led by a Finnish cardiologist, who found that men who use a sauna several times a week have a reduced risk of heart attack, stroke, hypertension, Alzheimer’s disease and overall mortality.

Other researchers have investigated how “heat stress” that comes from exposure to high temperatures unleashes what are called heat-shock proteins, which are cellular molecules that help repair other proteins in cells. These proteins, writes Mr. Gifford, can also help reverse nonalcoholic fatty-liver disease, which is often a precursor to diabetes.

In a book full of bold medical claims, the most striking may be Mr. Gifford’s discussion of a potential nexus between heat and depression. “Patients with major depression don’t sweat very much,” he notes, adding that many show an elevated resting body temperature. A powerful remedy seems to be heat. He points to one study showing that hot-yoga classes can curtail depression more effectively than antidepressant drugs. Infrared saunas and hot-water immersion are also, he suggests, powerful therapies.

Adaptations allowed early humans to thrive in sunbaked climates. Even now health benefits can be associated with a sweaty sauna session.

Exposure to heat, with the perspiration that follows, eventually calls for hydration. But how much? Mr. Gifford wades through competing schools of advice from over the years, which have variously suggested not drinking water during competition and consuming “the maximum amount that can be tolerated” (as the American College of Sports Medicine put it in 1996). The book contains a frightening portrait of hyponatremia, which is a low level of sodium in the blood that can be triggered by ingesting too much water—a particular danger during endurance events. The author illustrates it with the painful story of a young runner in the Boston Marathon who died from the condition in 2002.

“Hotwired” also includes a well-reported section on the health risks football players face from prolonged exposure to heat, which can raise an athlete’s internal temperature dangerously. The phenomenon is common during preseason practices that begin in late summer and can be worse among linemen and other players whose larger frames have a harder time cooling off. In August 2011, three high-school players in Georgia and Florida died of heatstroke. Georgia adopted heat-safety guidelines the following year and has seen fewer such illnesses since.

First-person accounts of Mr. Gifford enduring and sometimes enjoying high temperatures enrich his narrative. He goes through grueling heat-training sessions in a lab at the University of Connecticut and in a Colorado hospital. He also rides in a popular 100-mile bicycle race called Hotter’N Hell. The competition is held each August in Wichita Falls, Texas, where the air temperature typically exceeds 100 degrees. The year that Mr. Gifford competed, even more extreme heat led to the race being shortened to 75 miles. After training his body to adjust, he had no trouble finishing.

A pleasant surprise is that a book about heat doesn’t wade into familiar debates over climate change. Mr. Gifford limits himself to citing the well-documented fact that cold weather is responsible for many more deaths than hot weather. He drolly notes that this is “pretty much the opposite of what you typically hear on the news.”

One of the most intriguing propositions in “Hotwired” is the author’s belief that seeking heat can help bring people together. Mr. Gifford’s ability to successfully navigate hot-weather racing, saunas and other sweltering circumstances, stems from having experienced each of them with other participants: “I had felt the power of heat to heal and connect us, to one another and ourselves.” Raising your temperature as a remedy for loneliness? It’s a warmhearted conclusion.

Mr. Rees is president of the ghostwriting firm Geonomica and a senior fellow at Dartmouth’s Tuck School of Business.

He has a strong case to make, but if he backs down, the costs will be profound.

Hormuz and the global turmoil in energy and stock markets haven’t shaken Mr. Trump’s resolve.

The cruel glare from that explosion is revealing some hard truths. For the president, the question is whether he pulls back or dives deeper in. The answer will define his place in history. If the U.S. pulls back from the new energy war without reopening the Strait of Hormuz and achieving goals like securing Iran’s

California’s Never-Ending Race Preferences



MAIN STREET
By William McGurn

They’re back. The champions of racial preferences, that is. In California they are trying to jam preferences into a state constitution that forbids them—similar to two fights they have lost in recent years. In the meantime, the U.S. Supreme Court threw a major roadblock in their way, declaring affirmative action in college admissions unconstitutional in *Students for Fair Admissions v. Harvard* in 2023.

California has so many real problems—problems that affect people of all races and ethnicities,” says Gal Heriot, a recently retired professor of law at the University of San Diego and a former member of the U.S. Commission on Civil Rights. She was also a leader in fights since then to keep racial preferences out of California’s constitution.

“Our legislators are fixated on promoting identity politics,” she says. “They are living in a different world from the rest of us. They can’t seem to stop themselves.”

California’s constitutional battle is rooted in an amendment, Proposition 209, which the state’s voters approved in

1996. Proposition 209 forbids discrimination against or preferential treatment for anyone “on the basis of race, sex, color, ethnicity, or national origin” in “public employment, public education, or public contracting.” That’s clear enough, which is why activists are always trying to gut it.

At the center of this latest attempt is a bill introduced by state lawmaker Corey Jackson called Assembly Bill 1023—the effort also took the form of a proposed constitutional amendment called ACA 7, also introduced by Assemblyman Jackson. But the two ACA 7s are very different measures.

The 2023 version of ACA 7 would have allowed the state to fund programs for specific groups “if those programs are established or otherwise implemented by the State for purposes of increasing the life expectancy of, improving educational outcomes for, or lifting out of poverty specific groups based on race, color, ethnicity, national origin, or marginalized genders, sexes, or sexual orientations.” But *Fair Admissions* made clear that such measures would be unconstitutional.

So the new ACA 7 involves a change in scope. It would modify Proposition 209 by narrowing the ban on discrimination in “public education” to cover only “higher education admissions and enrollment.” That would open the door to racial considerations in K-12 education and in college and university financial aid.

In a Feb. 14 letter to Monique Limón, the California Senate’s president pro tem, Ms. Heriot argued that while the financial aid packages of two students can look similar,

Again activists attempt to gut the Golden State’s ban on affirmative action.

big differences may remain. For example, “an African American student would be given grants, while a student of any other race would be saddled with student loans, despite having equal (or even greater) financial need.”

The new ACA 7’s elevation of race over need could thus have the perverse result of a more generous financial-aid package going to a wealthy black student than to a poor Asian student. We know how this game ends: in bitterness

and resentment. Even some who favor preferences in admissions would likely balk at a better package of aid simply because of an applicant’s race. The legislative path ahead is clear even if the outcome is uncertain. ACA 7 has passed the Assembly, and proponents of state-sanctioned race discrimination need it approved by two-thirds of the Senate to get it on the ballot for November’s election. The bill in 2023 never made it that far.

Mr. Jackson insists his bill wouldn’t eliminate the constitutional prohibition on racial discrimination. He put it this way to California Black Media: “What ACA 7 really does is clarify Prop. 209, because too often local governments and others apply it to everything.”

Edward Blum isn’t buying it. He runs Students for Fair Admissions, which brought the case in which the Supreme Court declared racial preferences in college admissions unconstitutional.

“California voters rejected race preferences decades ago,” Mr. Blum says. “Now there is yet another effort to reintroduce them, this time through financial aid and other channels, which ignores the clear mandate of the voters. The Constitution’s demand for equal treatment must be defended by every generation.”

On Iran, Is Only Bad News Fit to Print?

By Mark Penn and Andrew Stein

President Trump’s complaints about the news coverage of the Iran war are predictable—and entirely justified. “We are totally destroying the terrorist regime of Iran, militarily, economically, and otherwise, yet, if you read the *Falling New York Times*, you would incorrectly think that we are not winning,” he wrote Friday morning on Truth Social. Pick up Sunday’s *Times*, and it’s as if the editors took that as a command rather than a criticism.

“War Sends More Tremors Through a Shaken World Economy,” reads a headline across the top of the front page, with the speculative subheadline “Fallout From Prolonged Conflict With Iran Could Bring ‘Catastrophic Consequences.’” Among the catastrophes the article cites: “In Kenya, tea growers and traders worried their exports to Iran would rot on the

dock.” The other story above the front-page fold is a critique of the defense secretary: “Hegseth’s Vengeful Rhetoric Grew From Experience in Iraq.”

Inside the paper are six more pages of war headlines, almost all relentlessly negative. There are disdainful pieces about the secretary of state (“For Trump and Rubio, It’s Destroy and Deal”) and about the central U.S. ally in

Media partisanship has been worse than ever in this war.

the effort (“U.S. War Alliance with Israel Is Reshaping Middle East”), and about the Israeli prime minister (“Netanyahu Has War He Always Wanted, but on Trump’s Terms”). There’s more economic gloom (“Seized Oil Tankers Are Costing U.S. Tens of Millions”) and “Oil Price Surge Rattles Weak Pakistan Economy”).

The biggest development since Saturday’s paper was the U.S. strike on Kharg Island, Iran’s main oil-export hub. The president said that the raid “totally obliterated” military facilities on the island and that he had decided to spare oil infrastructure “for reasons of decency.” Clearly the U.S. could strike them and do much more damage. The *Times* headline depicted the raid as ineffective: “Iran Firm on Strait Blockade Despite U.S. Attack at Oil Hub.” The only positive headline about the war effort: “To Fight Iran’s Drones, U.S. Taps Knowledge Hard-Won in Ukraine.”

Like the *Times*, much of the news media seems determined to advance a narrative that Mr. Trump is wrong about everything and that the U.S. is getting its clock cleaned by a powerful Iranian war machine that has successfully made the transition to new leadership.

Journalists have a right and a duty to report bad news

and to question Pollyannaish reports from the U.S. government. But many seem to be going beyond that and rooting for America to lose—against an enemy that is the world’s biggest state sponsor of terrorism, that has killed thousands of unarmed protesters, and that stockpiled thousands of ballistic missiles while seeking nuclear weapons, which its rulers promised to use against the U.S. and Israel.

Largely absent are even the most basic stories analyzing Iran’s losses and the fate of their supposed leadership. Why? What seems to be driving the coverage is reportorial partisanship and the Democrats’ determination to oppose this president no matter what he does. We’ll see, again, how that works out for them.

Mr. Penn was a pollster and adviser to Bill and Hillary Clinton, 1995-2008. He is chairman of the Harris Poll and CEO of Stagwell Inc. Mr. Stein served as New York City Council president, 1986-93.

OPINION

REVIEW & OUTLOOK

The Battle for the Strait of Hormuz

It's no mystery what Iran intends to achieve by blocking the Strait of Hormuz. It seeks to pressure President Trump to end the war prematurely, establishing an Iranian veto on energy flows and winning impunity in the future. But what if Mr. Trump won't play along? The result is the emerging Battle of Hormuz.

An Iranian tanker blockade has always been the main contingency anticipated by war planners, and the U.S. has followed a phased plan of degrading air defenses, missiles and navy. These are prerequisites to reopening Hormuz to commercial traffic.

Asked Sunday about the political cost of rising oil and gas prices—Iran's remaining means of coercion—Mr. Trump replied, "I have to do what's right. I can't say that, 'You know, gee, I don't want to have any impact on oil prices for three or four weeks, or two months, and we're going to let Iran have a nuclear weapon.'"

On Friday the U.S. bombed military targets on Kharg Island and threatened to hit or seize the oil-export terminal there. The deployment of a Marine rapid-response force to the region adds teeth to the threat. Given a choice between defeat and escalation, Mr. Trump is signaling he may prefer the latter.

A Pakistan-bound tanker openly transited Hormuz on Monday, and Iran may cut deals that reinforce its control of who can or cannot pass. Mr. Trump is rallying a coalition, and allies can help reopen the Strait with anti-mine vessels and more. "Numerous countries have told me they're on the way," he said Monday.

Good thing the President hasn't antagonized allies with tariffs or threats to invade Greenland. This is a reminder that treating allies well is wise so they are more likely to help when you really need them.

Retired Rear Adm. Mark Montgomery, who has commanded a carrier strike group, recently laid out what a Hormuz operation might look like. First, continue to degrade to a "militarily manageable risk" the missiles, mines, drones and unmanned surface combatants that could threaten U.S. forces and tankers. Second, maintain "an unblinking eye that looks 50 miles on either side of the Strait and 100 miles back."

Time to Give Up the Jerome Powell Case

President Trump's lawfare efforts aren't faring well in court, and the latest example is a federal judge's decision last week to quash subpoenas in a probe of the Federal Reserve and Chairman Jerome Powell. Mr. Trump would be wise to take the hint and abandon the case so his nominee, Kevin Warsh, can be confirmed as the next Chairman.

The Fed asked the court to quash the subpoenas issued by the U.S. Attorney for the District of Columbia, and federal Judge James Boasberg did so in withering fashion.

"The President spent years essentially asking if no one will rid him of this troublesome Fed Chair. He then suggested a specific line of investigation into him, which had been proposed by a political appointee with no role in law enforcement, who hinted that it could be a way to remove Powell," he wrote. "The President's appointed prosecutor promptly complied. Those facts strongly imply that this investigation was launched for an improper purpose, as were the resulting subpoenas."

California Has an Oil and Gas Problem

California Gov. Gavin Newsom is trying to shift blame for his state's high gasoline prices to—who else?—President Trump.

Yet at the same time he's opposing the Administration's move to restart offshore drilling and production that would reduce his state's reliance on foreign oil and lower its gasoline prices.

Energy Secretary Chris Wright on Friday directed Sable Offshore Corp. to restart operations at an oil and gas project in federal waters off the California coast, as well as a pipeline that carries crude to onshore distribution networks. The pipeline hasn't operated since a spill in 2015, which has stranded offshore production.

Sable acquired the project and repaired the pipeline, but state officials have blocked oil flows from resuming. Mr. Wright on Friday invoked the Defense Production Act, saying their restoration will "address supply disruption risks caused by California policies that have left the region and U.S. military forces dependent on foreign oil."

He's right. California's anti-fossil fuel policies have made it—and some 50 military installations in western states—dependent on foreign oil and vulnerable to supply shocks. These include its cap-and-tax program, low-carbon fuel standard and drilling limitations. While U.S. crude production has increased by about 50% over the last decade, California's output has fallen by half.

A lack of interstate pipelines means California can't easily bring in oil or gasoline from other states. The state imports about 60% of its crude from overseas—up from 5% in the mid-1980s—about a third of which comes from the Middle East. About 15% of the state's refined fuels are also imported, much of which

Third, keep "four or eight aircraft persistently overhead" during convoy operations, equipped with Advanced Precision Kill Weapon Systems, "a cheap rocket—\$25,000—that is extremely effective against Shahed drones." Fourth, have "armed helos" ready to attack small boats that emerge.

Fifth, deploy 10-14 Aegis destroyers, whose air defenses make them "the perfect escort ship." These surface combatants first need to be brought into place, and allies could join later.

This is no easy mission, and "militarily manageable risk" won't be comforting to Americans or energy markets if this goes sideways. But Iran doesn't hold all the cards. Its action in Hormuz could force Mr. Trump to see the war through, which is bad news for the regime.

Two weeks ago the fear in some quarters was that Mr. Trump would end the war when the U.S. ran out of major Iranian military targets to strike, sparing the legion of smaller regime targets Israel wants to hit. Now Tehran has given the U.S. a challenge that could add up to a strategic defeat if Mr. Trump stops early.

Israel would use the time to further weaken Iran's regime by carrying out the full campaign, which Mr. Trump had said was planned for four-to-six weeks. Mr. Trump's comment Sunday that "we may delay" a trip to China, planned for March 31, is a good sign he isn't limiting the war to arbitrary deadlines.

In the longer term, many states will seek alternative supply routes, to avoid the Strait, and even alternative suppliers—a cost Iran will share with the Gulf states it now attacks. Expect Saudi Arabia and the U.A.E. to add more pipelines to bypass the Hormuz chokepoint.

Armed with missiles and drones, Iran's regime has closed international waters and attacked neighbors' energy facilities. This is while Iran is relatively weak. Imagine how the regime would blackmail the world—and get away with it—if it were left to amass twice or three times the missiles, or nuclear weapons.

The Battle for Hormuz underscores the U.S. interest in degrading the ayatollah regime—and giving Iranians a chance to overthrow it.

Judge Boasberg has a reputation as a liberal, but in this case his evidence and reasoning are sound. The chronology of events suggests that U.S. Attorney Jeanine Pirro was responding to pressure from Mr. Trump to target Mr. Powell in a criminal case without evidence of criminal behavior.

The smart move now is for the White House to take the loss and drop the case. Don't appeal. The quicker the case is gone, the sooner Mr. Warsh can get through the Senate Banking Committee and onto the Senate floor to be confirmed. It's also more likely that if the case goes away, Mr. Powell might resign from his Fed seat and Mr. Trump would get another appointment to the seven-member board.

Mr. Warsh deserves a clean slate as he starts as Fed Chair—without the baggage of a legal case that would harm his ability to lead and make the changes necessary on policy and personnel at the Fed. What matters to the economy is monetary policy, not more harassment of a public servant who on all of the available evidence has done nothing illegal.

depends on Middle East crude.

California's reliance on foreign oil raises shipping costs—which are passed onto consumers—and CO2 emissions. It also increases the risk of supply disruptions. That's why gasoline prices have risen by about 15 cents a gallon more in California than they have nationwide during the current

war in Iran.

The state's oil production is set to fall further after a pipeline that carried crude from Kern County, the state's most prolific oil region, stopped operating in December because declining flows made it uneconomic. Nearly 100 trucks a day are now transporting crude from the fields to a pipeline terminal, but this isn't a financially sustainable work-around.

California's increasing reliance on imports will require port upgrades and creates national-security vulnerabilities, which Mr. Wright's order will mitigate. Sable said Monday that it has about 540,000 barrels of processed crude oil in storage and plans to begin selling 50,000 barrels a day of oil this month.

This will allow "American energy to reach domestic refineries more efficiently, while reducing California's reliance on foreign oil vulnerable to geopolitical disruption," Mr. Wright said. It would also somewhat reduce California's gasoline prices, which have spiked to \$5.52 a gallon versus an average of \$3.72 a gallon nationwide.

Mr. Newsom, a master in misdirection, last week lambasted Mr. Trump for increasing gasoline prices and called Mr. Wright's order a "political attempt to point the finger at California to divide and distract the American people from his wartime failures." Who's really the one trying to distract the people from his failures?

Iran is giving Trump and Israel a reason to keep weakening the regime.

LETTERS TO THE EDITOR

Will Congress Relive LBJ's Great Society?

Your editorial "Elizabeth Warren's Housing Coup" (March 11) singles out a few provisions you dislike in a bipartisan package that would materially increase housing supply, lower costs, reduce burdensome regulation, help accelerate further pro-housing action, and give local governments new tools and incentives to address housing challenges in their communities.

The 21st Century ROAD to Housing Act advances key conservative priorities: streamlining federal environmental review and permitting, equipping local officials to meet their housing needs, making federal rental assistance less burdensome for landlords, directing federal agencies to align duplicative requirements and encouraging federally assisted households to pursue employment and become more financially secure. The list goes on, but many of these initiatives are long overdue.

Sens. Tim Scott (R., S.C.) and Elizabeth Warren (D., Mass.) deserve recognition for thoughtful, pragmatic policymaking. Garnering levels of support in the Senate typically reserved for inoffensive legislation like renaming post offices, their housing package shows that partisan divisions need not prevent lawmakers from responding to one of the most serious economic challenges facing American families: high housing costs.

DENNIS SHEA
Bipartisan Policy Center
Washington

Ms. Warren's proposal would revitalize the central planning ambition that motivated the Department of Housing and Urban Development's creation in 1965 as part of Lyndon B.

Johnson's Great Society social policies, HUD and the subsequent 1968 Housing and Urban Development Act, which established a goal of building or rehabilitating 26 million housing units over the next decade and required an annual report to Congress on progress toward it, provided a huge opportunity for industry to lobby for federal money, loan guarantees and regulatory preferences.

There was a chance to go another way. President Carter created a Housing Commission to replace the expiring 1968 Act with a new central plan—the price of getting the various housing lobbies supporting his flagging re-election campaign. As HUD's acting deputy assistant secretary and chief economist, I was involved in the Carter initiative and advised the incoming Reagan administration of the dangers of a commission of industry representatives. President Reagan summarized the resulting statement of principles by the commission: "The Commission's findings reflect a fundamental confidence in the free market system, a recognition that a genuine housing recovery, essential for us all, can only be accomplished through the principal reliance on the strength and initiative of the private sector."

Had the commission's recommendations been followed, the financial crisis of 2008 and the consequent global recession could have been avoided.

KEVIN VILLANI
La Jolla, Calif.

Mr. Villani was the acting deputy assistant secretary and chief economist at HUD (1979-82), and Freddie Mac senior vice president and chief economist (1982-85).

Funding DHS Shouldn't Be a Partisan Issue

I appreciate your editorial "The N.Y. Terrorist Attack and DHS Funding" (March 10). I've been waiting for a major news outlet to draw the obvious line between the Democrat's refusal to fund the Department of Homeland Security and the extraordinary level of risk it places on everyday Americans while we are at war with Iran.

Regardless of where you stand on the war, it's true our threat level at home has risen exponentially. Democrats' gamesmanship is making pawns of every American who boards a plane, train, bus or goes about his or her daily life in public venues—or uses free-speech rights to protest, as was the case when two ISIS-inspired men tried to wreak destruction in New York.

The irony is that even as Democrats hold DHS funding hostage to their demands to severely curtail Immigration and Customs Enforcement, the danger facing Americans is partially to blame on the open borders during President Biden's term. We don't know who among the many millions that crossed with no vetting came here expressly to wait for an opportunity to do us harm. Add former DHS head Kristi Noem's ill-timed reversal of some Transportation Security Administration screenings, and we are even more exposed. Please, Democrats, put the American people ahead of this partisan squabble. No life on American soil, no matter how the person votes, is a price worth paying.

BEVERLY LOWRY
Dallas

Will There Be Enough Workers to Power AI?

Concern that artificial intelligence will wipe out white-collar jobs is understandable ("Tech Firm's Move Fans New Dread of AI Jobs Wipeout," Business & Finance, March 2). However, insights from across the labor market suggest a different pattern: AI is reshaping work rather than erasing it, changing the tasks people perform and the skills employers require.

That shift is visible in the demand for the workers needed to build and run the infrastructure behind the AI boom. Scaling AI requires vast physical systems, data centers, energy networks and automated production facilities, and demand for the people

who support them is rising rapidly. Randstad analysis shows that 50 million job postings shows demand for robotics technicians has increased 107% since 2022, while demand for heating, ventilation and air-conditioning engineers, essential for installing and maintaining data center cooling systems, has risen 67%.

The effect extends beyond emerging technical roles. As the digital economy expands into the physical world, demand for traditional skilled trades is also climbing, with postings for electricians, welders and construction workers rising as companies invest in the infrastructure required to support AI-driven growth.

At the same time, the talent pipeline for these roles is tightening. Today it takes longer to hire a skilled trades worker than a desk-based professional, reflecting a widening gap between AI ambition and workforce supply. Demographic pressures are compounding the challenge, with fewer young workers entering sectors such as manufacturing, while large portions of the workforce approach retirement.

The real risk isn't that the economy runs out of jobs, but that it runs short of the people needed to power the AI era.

SANDER VAN 'T NOORDENDE
Chief executive, Randstad
Diemen, Netherlands

Iran, Russia and Mr. Trump

President Trump has been dismissive of a point this editorial makes ("Iran Isn't Winning This War," March 10): "News reports say Russian intelligence is helping Iran target U.S. forces." As a member of my family's four generations who have served in the U.S. Army during wartime, and currently having a grandson in Iraq, I find this attitude deeply troubling. To paraphrase an old saying, the friend of my enemy is my enemy. As commander-in-chief, Mr. Trump's failure to act accordingly places all our forces at greater risk.

RON MOORE
Knoxville, Tenn.

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Pepper ...
And Salt

THE WALL STREET JOURNAL



"I say live in the moment. Before you know it, you'll be five."

OPINION

ESG May Be Eating Away at Your Investments

By Phil Gramm
And Jeb Hensarling

President Trump recently signed an executive order that aims to end a 20-year experiment in backdoor socialism usurping private wealth to serve special interests. It affirms fiduciary responsibility and extends it to proxy advisers “that prioritize radical political agendas over investor returns.” Fiduciary responsibility requires investment managers and advisers to act in “the best interest of the investor,” and it applies even when the investor is seeking nonfinancial outcomes such as environmental, social, faith-based or humanitarian gains.

Securities and Exchange Commission Chairman Paul Atkins’s recent announcement that the commission is reviewing Biden-era rules governing so-called environmental,

Trump and the SEC affirm fiduciary duty, benefiting even shareholders with nonfinancial objectives.

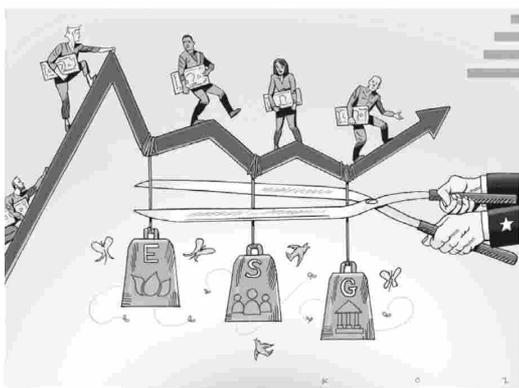
social and governance funds affirms this point. Fiduciary duty requires investment managers and advisers to exercise loyalty and care to ensure that investment objectives, whether financial or nonfinancial, are fulfilled.

Pursuing ESG objectives without the investor’s expressed consent has been part of a thinly veiled attempt by progressives to coerce investment managers and private corporations to advance their political goals and not the investors’ interest. This process began in 2006

when United Nations Secretary-General Kofi Annan announced the Principles for Responsible Investment initiative. Loud activists with anticarbon and pro-DEI agendas have colluded with asset managers to push through hundreds of corporate stockholder resolutions contrary to the financial interests of general investors.

As investors have noticed that ESG constraints produce lower returns while delivering few environmental or social benefits, opposition to ESG has grown. While the Biden administration used the same government agencies charged with protecting fiduciary responsibility to promote ESG, investor support for ESG stockholder resolutions fell from 33% in 2021 to 13% in 2025. The number of ESG proposals voted on in the last proxy year dropped 33% from the previous year. Support for ESG resolutions by asset managers, voting the shares of their investors, has dropped from 46% in 2021 to 18% in 2025.

Investment firms are backing away from imposing ESG constraints on general investments and are tailoring offerings to target investors who actually want to promote nonfinancial objectives. U.S. investors have poured \$6.6 trillion into achieving partially nonpecuniary results, according to the US Sustainable Investment Forum. And 48% of U.S. investors remain “very interested” in sustainable investing, with support even higher among younger investors, according to a 2025 survey conducted by Morgan Stanley. If idealism outlives youth, ESG investing will grow significantly.



ESG investment funds have often fostered the illusion that investors are supporting more “sustainable” environmental outcomes while earning similar risk-adjusted returns. Rarely is that the case over extended periods. ESG investment funds routinely rely on unproven and inconsistent analytics. Weighting investments in companies based on carbon or DEI metrics means, logically, that more important factors of financial performance are underweighted. The predictable financial underperformance of ESG funds is made worse by higher management fees.

In most ESG investing, no systematic effort is made to verify the claimed nonpecuniary impact of the investment, and government regulators have, as far as we can tell, assumed impact investors have opted

out of fiduciary protections. Conflicts of interest among advisers are rampant. Proxy adviser Institutional Shareholder Services, for example, advises companies on shareholder ESG proposals and then turns around and sells the same companies ESG ratings. Mr. Trump’s executive order correctly raises “significant concerns about conflicts of interest and the quality of their recommendations.” In a survey article in the Harvard Business Review, Sanjay Bhagat finds that ESG investments are “not making much difference to companies’ actual ESG performance” and that they “perform poorly in financial terms.”

Investors, investment advisers and government agencies charged with enforcing fiduciary responsibility need reliable independent data to

ascertain whether investments achieve their noneconomic goals and promised rates of return. The University of Utah has spearheaded an effort to provide investors with financial and nonfinancial measures to determine whether their investments are delivering on their goals. These analytics measure the authenticity of investments, whether they achieve investors’ nonfinancial objectives, and whether they yield promised rates of return. A high score would provide evidence that an ESG-minded firm is fulfilling its fiduciary responsibility and possibly even meeting the requirements of the 2019 SEC Regulation Best Interest rule.

The Trump administration’s executive order on fiduciary duties is one of its most important pro-market actions. It should end ESG piracy by extending the standards of fiduciary duty to investors who want their money to achieve nonpecuniary as well as pecuniary goals. Greater transparency and clarity are urgently needed to disinfect the greenwashing fraud of many ESG initiatives. Instead of helping investors to do good while doing well, ESG investing too often delivers on neither promise. Government enforcement of our fiduciary laws can bring an end to such abuse.

Mr. Gramm, a former chairman of the Senate Banking Committee, is a visiting scholar at the American Enterprise Institute. Mr. Hensarling, a former chairman of the House Financial Services Committee, is an economics fellow at the Cato Institute. Mike Solon contributed to this article.

The Bulldog Is Out of the Pound. Make Way for the Squirrel



EDITOR AT LARGE
By Gerard Baker

If you’re looking for a metaphor for the decline of Western civilization, you could do worse than the news that Winston Churchill, who was often likened to a bulldog or a lion, may soon be replaced in Britain’s public esteem by an actual squirrel.

Last week the Bank of England took time out from fumbling British monetary policy to announce that the next set of bank notes it issues won’t feature portraits of leading political, scientific and artistic figures from Britain’s past. Instead of Jane Austen (the renowned 19th-century novelist), J.M.W. Turner (the 19th-century painter), Alan Turing (the 20th-century computer scientist) and Churchill, who now grace the reverse of the side featuring the monarch, there will in future be a menagerie of yet unidentified British fauna.

Victoria Cleland, the bank’s chief cashier, explained the change: “The key driver for introducing a new bank note series is always to increase counterfeit resilience, but it

also provides an opportunity to celebrate different aspects of the U.K.”

The bank says the new series is the result of a consultation exercise it conducted last year in which 40,000 people submitted their votes for themes, and, it seems, British wildlife came out on top. Still, given the bank’s warning that it would not print imagery that it considered “divisive” or “exclusive,” you can guess the thinking.

In case you hadn’t noticed, Churchill, Turner and Turing were all white males; Austen was white too. I suspect the DEI-vigilant folk who run most British public institutions were desperate not to risk upsetting the cultural vigilantes who would squeal like a trapped fox at another set of tributes to dead white people. Having valiantly elevated Turing as the first gay man to be so honored in the last round of revisions, they presumably couldn’t have come up with a sufficiently recognizable black or brown-skinned lesbian or Muslim to take his rightful place on the tenner, so going with the line of least resistance, they are opting for the “inclusive” safety of native owls and water voles.

There is hope that this latest act of criminally woke folly could back-

fire. Many greeted the news with derision. The bank is now committed to a second consultation exercise in which it will ask respondents for their favorite animal. This is a risky activity in Britain, where such things can get hijacked by anarchic satirists. A 2016 public consultation

In the latest augur of Western decline, the Bank of England dumps national heroes in favor of animals.

exercise conducted by the Natural Environment Research Council asked Brits to name a new polar scientific research ship and ended in a hefty victory for the name *Boaty McBoatface*.

It’s easy to laugh. Perhaps the disappearance of history’s icons from a depreciating currency isn’t a fatal blow to the canon of British culture. But in the week I just spent in Britain it wasn’t the only sign of a national identity crisis.

There was also the news that council districts in Northern England had instructed schoolteachers

not to encourage children in classrooms to draw any pictures that might be offensive to Muslims. A booklet of guidelines titled “Sharing the Journey”—a tool kit to help manage “sensitivity and awareness around faith and beliefs”—said teachers shouldn’t ask students to “reproduce images of Jesus, the prophet Mohammed or other figures considered to be prophets in Islam,” lest the large and growing Muslim communities in the locality take offense.

No nativity scenes or crucifixes, please, we’re British.

We also watched as the new member of Parliament from Manchester, the city that gave its name to an influential school of Victorian liberalism, took her seat. Hannah Spencer, a winsome 30-something plumber, is a national sensation. Last month she became the first Green Party candidate to win a parliamentary by-election. Oddly, the English Greens no longer preach about the climate catastrophe that was recently going to wipe out humanity. Instead they are the repository of a growing number of radical-progressive causes and are doing exceptionally well among formerly Labour-voting communities in some

parts of the country, especially those with large immigrant populations vocally hostile to Israel. In her maiden speech Mr. Spencer criticized the “scapegoating of Muslims” as one of the key challenges the country faces. This at a time when expressions of antisemitism have become commonplace.

Just three small snapshots from a midsize island off Europe.

I don’t mean to exaggerate. Contrary to some claims, Britain isn’t on the fast track to submission. Houellebecq’s take to radical Islam. London isn’t under Shariah, if the traditional displays of drunken excess on late-night streets are a guide.

What is clear is that the elites that still have the country in their grip remain committed to the slow eradication of the nation’s traditional values, wiping away “problematic” historical heroes and suppressing Christian iconography even as they demand protection for the followers of a different Abrahamic faith.

You do start to wonder: With Jesus and Turner out, and hedgehogs and Mum-protecting Green plumbers in, when does Britain stop being counted as the West?

How to Keep Up the Economic Pressure Against Iran

By Michael Doran

Two different Donald Trumps have appeared before the public in recent days. One suggests that the war in Iran may soon be over. The campaign, he says, is “very complete, pretty much.” The other insists that the U.S. will accept nothing less than “unconditional surrender” from Tehran and warns that operations will continue until Iran is totally defeated.

The president faces a strategic dilemma. Two clocks are running. One measures the collapse of Iran’s regime under military and economic pressure. The other measures the growing global disruption—rising oil prices, strained interceptor stockpiles and pressure from allies and markets to end the conflict. If the second clock runs out first, the pres-

ident could declare a cease-fire before forcing Tehran to surrender.

Events inside Iran offer a glimpse of the dangers of this scenario. Last week something unusual happened: While the Americans and Israelis bombed Iran, the Iranian rial strengthened against the dollar, rising about 13%.

Why? Iran’s central bank, one presumes, injected foreign currency into the black market to prop up the rial. But the bank’s reserves are limited. That raises a troubling possibility: that one or more of Iran’s neighbors and allies are quietly helping stabilize the currency. Senior Western officials tell me they suspect Qatar, which is eager to prevent further attacks against its gas infrastructure, China or Russia could also be helping.

This kind of behavior isn’t unique to Qatar. All Gulf states have a his-

tory of hedging—buying temporary removal from Iran’s drone and missile targeting list through quiet financial transfers and economic concessions to Tehran.

By forcing the Gulf states to hedge, Iran also pushes them toward China. As these nations look to Beijing for security, China’s power as a middleman grows. Meanwhile, Beijing strengthens Tehran by facilitating its missile production and buying its oil, which is subject to Western sanctions, at a steep discount. Iran’s missiles and drones serve as the muscle enabling China to exert greater influence over the Persian Gulf’s energy market as well as its arms market.

This cycle helps China construct a shadow banking network through U.S. allies. When China buys oil from Iran, it doesn’t pay Tehran directly. Instead it pays shell companies that route the funds into bank accounts in the United Arab Emirates, a key American partner. According to the U.S. Treasury, Emirati firms handle by far the world’s highest volume of Iran’s shadow funds, exploiting opaque registries and lax rules to keep Tehran solvent.

If the war ends before that system is broken, Beijing will step in—as it did last year—to help Tehran rebuild its missile production facilities. The protection racket will continue. For this reason, the way the war ends matters profoundly.

The best outcome would be the permanent destruction of Iran’s missile and drone capabilities—the elimination of its launch infrastructure, production facilities and underground arsenals—together with the complete dismantlement of its

nuclear weapons program and the systematic dismantling of decisive defeat of its proxy forces across the region. But if global economic pressure forces an early cease-fire, President Trump still has the tools to ensure that Tehran can never rebuild what it has lost.

That will require a new phase of economic warfare: Maximum Pressure Campaign 3.0—building on the original 2018-21 campaign (1.0) and its restoration and intensification in

If the shooting stops and the regime is still in power, the U.S. can still strike at its financial lifeline.

2025 (2.0). This campaign must block Iran from rebuilding its military capabilities after any cease-fire. With its currency collapsed, its banking sector paralyzed, and its critical defense infrastructure in ruins, Iran’s economy stands closer to systemic failure than at any point since 1979. Maximum Pressure 3.0 must ensure this breakdown continues until the regime can no longer reconstitute its coercive power.

Curtailed Iran’s oil revenues is critical—but it’s only the first step. Washington must put pressure on the trade itself. Tehran will attempt to continue using intermediaries to sell crude oil at steep discounts to China. Every stage of that trade—from shipping and insurance to the ultimate buyers—should face secondary sanctions from the U.S. Washington also must dismantle

Iran’s shadow banking system. Over the past decade, Tehran has built an elaborate sanctions-evasion network using shell companies hosted by American allies such as the U.A.E. Closing these channels and freezing the funds they hold would strike directly at the regime’s financial lifeline.

The U.S. must use economic warfare to target Iran’s ability to import the machinery and technology needed to rebuild its military infrastructure. Companies that supply industrial equipment, electronics or specialized materials to Iran should face the risk of losing access to Western markets.

Finally, Washington needs to discipline its allies if they help the Iranian regime. No country should provide loans to Tehran or release frozen assets that could stabilize the regime’s finances. If a premature cease-fire becomes unavoidable, it must not give Iran the opportunity to stabilize its economy and gain the resources needed to recover.

Mr. Trump is on the verge of resurrecting the Carter Doctrine: No hostile power should be allowed to use the Persian Gulf as a lever against Western economies. What appears to be a regional war is in fact a contest over the strategic architecture of the Persian Gulf. The future of Iran isn’t the only thing at stake. The outcome of this war will determine whether the regime remains anchored to the U.S. and its allies or gradually shifts into China’s economic and security orbit.

Mr. Doran is director of the Middle East center at the Hudson Institute.

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The FT View



FINANCIAL TIMES

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Trump's coalition of the unwilling

US allies have a right to avoid being sucked into a war they never sought

US allies are becoming used to Donald Trump making threats, implicitly or explicitly, about Nato. A few weeks ago the president declined to rule out using force to seize Greenland, a Danish territory – which could have spelled the end of the North Atlantic alliance. Now, in an interview with the FT, Trump has warned that it will be "very bad for the future of Nato" if US allies fail to help in unblocking the Strait of Hormuz.

America's partners are suffering, too, from soaring oil prices since Iran in effect closed the crucial oil artery. Getting dragged into the Middle East conflict, however, could be worse. They have every right to remain outside a war they did not seek or endorse.

Trump has called for European allies including the UK and France, as well as

China, Japan and South Korea, to join a coalition to open the strait. Despite America's naval strength, officials say European countries possess specialised assets. For the US, having a multi-flagged fleet in the strait makes it harder for Iran to retaliate without risking escalation on multiple fronts.

The president also argues that other countries are far bigger consumers of Gulf oil than the US. Under pressure from rising petrol prices, it is useful for him to show he is pressing countries he has accused of being "free-riders" on US military might to share the costs of stabilising the world economy.

For those Trump is pressing to join in, doing so carries multiple dangers. Tehran has declared any ship from a coalition ally in the strait a "legitimate target", raising the risk of attacks that could suck them into a wider conflict. Trump is signalling that not participating carries risks, too: he might reduce US commitments to European security. While Trump is asking Nato members

to support a US-led coalition rather than launch a formal Nato mission, he is overtly using the alliance as a lever. Nato is, however, a defensive alliance designed to aid members that are attacked. It has demonstrated its readiness to come to America's assistance – in Afghanistan, when the US triggered Nato's collective defence clause after the 9/11 attacks for the only time in its history. It also undertook operations in Libya in 2011, under a UN Security Council mandate to protect civilians.

Trump, disingenuously, portrays allied support in Iran as a form of pay-back for US help to Ukraine. Russia's full-scale invasion posed a direct menace, however, to Nato's core area. The US decision to join Israel in striking Iran is, by contrast, a war of choice, in which Trump has provided no evidence that the Islamic regime posed an imminent threat. Nato is not a vehicle for one member to launch a discretionary conflict then demand that others pitch in. Prime Minister Sir Keir Starmer has

Nato is not a vehicle for one member to launch a discretionary conflict then demand that others pitch in

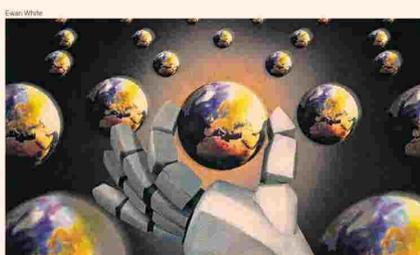
said the UK will "not be drawn into the wider war"; Germany has said it does not see a role for Nato in easing the blockade of the strait. French President Emmanuel Macron has offered naval assets for a potential operation to escort ships through the waterway – but only after the initial fighting is over.

US allies are justified in avoiding steps that could make them a party to the war. If the US and Israel call a halt to their strikes, partners can examine options to police the strait against any further Iranian attacks. They also have a role to play in negotiating with Iran.

Yet for Nato and other US allies, Trump's latest hectoring is one more sign of the need to accelerate building up their own defences. For the UK especially, which is dragging its feet on raising defence spending even to 3 per cent of output – and where the Iran conflict has exposed the shrunken state of its navy – it is a further warning that the old certainties of the transatlantic partnership are gone.

Opinion Technology

AI world models need to grasp cause and effect



Juan Carlos Castilla-Rubio

Human intellect rests on three pillars: seeing (observing the world), doing (intervening in it) and imagining (simulating what might happen under different choices). Right now, artificial intelligence inhabits only one of these pillars. Expanding existing frontier AI models will not address this problem. The breakthrough that set off today's frenzy was the transformer architecture, developed at Google and scaled up into large language models trained on much of the public internet and used to write text and code. Then came agents that stitch these models together into automated workflows. Now the focus is on "world models", which try to capture the physical environment from vast streams of video and other inputs.

We must train it to act as an internal map of how a slice of reality works, not just how it looks

World models are an important evolution from LLMs. This so-called spatial intelligence is being used to develop technology that can enable driverless cars and robotic factory workers. The trouble is that systems built in this way do not really understand the world they record. Instead, they mimic it one 3D object at a time. They conflate coincidence with cause. They can act without being able to explain why, optimise without grasping what happens if conditions change and hallucinate with great confidence. In domains such as healthcare, energy grids or, worse, autonomous weapons, the repercussions of this may not just be embarrassing but lethal. Decades ago, Alan Turing argued that a truly intelligent machine should "learn from experience". It should not passively observe but act. It should learn from the consequences of its actions and ask "what if?" Training a machine to do this will require something new – a "causal world model" that acts as an internal map of how a slice of reality works, not just how it looks.

Over the past 20 years, a small but determined group of scientists has been building a mathematical language of cause and effect, and with it a solid theoretical foundation for such models. The work, popularised in

Judea Pearl's *The Book of Why*, explains how to distinguish correlation from causation, formalise interventions and generate counterfactuals – in other words, the worlds that might have been.

Current AI models focus on correlations between variables. This works well in predictive situations where pattern recognition can be used. But causal world models are needed if we are to address the problems that matter most this century. Planning climate adaptation scenarios in megacities like São Paulo, where I live, requires asking "what if" questions about extreme events that have not yet occurred (and may not).

Genuine scientific discovery is not possible without models that can generalise, follow the causal rules of a system and generate realistic scenarios, and go beyond simply extrapolating and automating existing processes. Take complex biological networks, for example. How can we discover the novel bioproducts needed to accelerate the energy transition or solve complex diseases? Designing drought-resistant crops is not a matter of finding patterns in past yields; it requires an understanding of the ways in which the soil microbiome, plant genetics, water, nutrients, pests, diseases and weather interact – and an understanding of what drives what, when and where.

Emerging markets, which are both vulnerable and full of challenges that provide useful experimental data, should be at the forefront of this. They are ideally-suited innovation test beds, partners and co-developers. The world faces a choice. It can continue racing to build hyperscale infrastructure to support existing AI models, or it can opt to focus some of that attention towards developing models that grasp how the world really works and how it can be deliberately changed and controlled for the better.

Developing causal models may have other unexpected upsides. The brute-force approach of testing trillions of possible correlations and weighting them by trial and error will consume data, energy, emissions and money. But causal models should be parsimonious by design. Training and inference can be orders of magnitude more efficient because the machine would not be blindly searching; it would be probing along meaningful lines of causality under the constraints of the laws of physics that govern the real world.

From São Paulo to Nairobi to Mumbai, the costs of delay are counted in failed harvests and avoidable emissions. Without a revolution in how machines reason about cause and effect, the current AI boom risks ending in disappointment.

The writer is chair of SpaceTime Labs

Letters

Why the Greens' ecopopulism is in tune with British voters

Anna Gross's report "Is the Green Party too radical for Britain?" (March 9) focuses on whether the party's economic and migration policies would work. But the Greens' recent by-election success may also reflect a shift in how climate politics is being communicated.

Our recent analysis (with Climate Outreach) of Green Party campaign leaflets since Zack Polanski became

leader suggests explicit references to climate change are relatively rare.

This reflects the party's new "ecopopulism" strategy. Across more than 40 pages of leaflets, "climate change" appears only once, while terms such as "local", "people" and "community" appear far more frequently.

This does not necessarily mean environmental issues have been

deprioritised. Rather, climate and nature policies are often framed through everyday concerns such as energy bills, transport, local services and green spaces. Research on public opinion consistently shows that people care deeply about protecting nature, improving their local environment and reducing energy costs. Messages that connect climate action with these

practical concerns can therefore resonate strongly. Seen in this light, the Greens' communication strategy suggests that debates about whether the party is "too radical" may overlook how climate politics is increasingly framed through everyday economic and local concerns. **Adam Corner**
Strategy Lead, Climate Barometer, Bristol, UK

Westminster should try supermajority voting

Sir Vernon Bogdanor correctly diagnoses the flaws in Britain's "election lottery" (Opinion, March 7), but his prescription of proportional representation may be the wrong medicine.

The merit of our current system is the direct connection between the electorate and its representatives. By contrast, continental PR often distances voters from power and grants disproportionate leverage to fringe parties. This frequently thwarts the majority will and fuels the very polarisation Bogdanor seeks to counter.

Rather than adopting a system that risks legislative sclerosis, we should evolve our representative democracy by introducing "supermajority" requirements. Requiring certain high-impact or constitutional bills to meet a higher threshold – an approach already in evidence in the US – would grant smaller parties a meaningful voice and block "bad" laws without handing the keys of government to the extremes.

Such reform should not be piecemeal. We need a comprehensive "constitutional convention" – perhaps



addressed by Bogdanor himself – to address the electoral system alongside House of Lords reform, local devolution and the relationship between the home nations. If we are to advance the democratic model we helped pioneer, let us aim for a system of stability and consensus, rather than one of fragmented instability. **Raymond Dugnan**
Sherborne, Dorset, UK

A 'Made by Me' tag: to show humans created the content

Perhaps the EU should stop worrying about so-called "labelling fatigue" and the transparency code of its AI act, and turn the deepfake problem on its head ("The transatlantic battle over free speech", The Big Read, March 5). I've been wrestling with this issue in my own field, corporate reporting, for the past three years. And I've concluded that in a world where so much "stuff" can be generated in a nanosecond, we'll soon reach a point where it's realistic to assume that just about any information we see, whether text or visual, has been touched, if not wholly generated, by AI.

So, rather than requiring companies to label AI-generated content and thus fall foul of Big Tech with all its unpleasant ramifications, how about the EU requires companies to label non-AI-generated content? A "Made by Me" tag would please us human creators, and could perhaps be enforced through existing advertising standards law and regulation.

An EU regulation we rush gleefully to comply with? Now there's a thought... **Claire Bodanis**
Founder and Director, Falcon Windsor, London NWS, UK

Great bottles I remember are no longer affordable

In the debate over whether to drink Burgundy or Bordeaux (Letters, March 9), the discussion has been mainly about the intrinsic merits rather than quality vs price. In the 1980s I lived south of Burgundy and one could go to Clos de Vougeot and buy a few bottles directly from a grower. The great bottles that I remember are no longer affordable. The production volumes are much lower than those of Bordeaux so that whereas both have increased in price enormously, Burgundy prices are at "painful" levels. Another key difference is that in Burgundy one looks to the grower's skill, in Bordeaux you go for the name of the property. There if you want a reasonable, cheaper wine you choose a good value chateau. In Burgundy, even if you can get an allocation of the best grower's wine, you may not be sure which exact vineyard it was from and the quality can vary a lot over a short distance.

May I complicate things by mentioning the Rhône. Hermitage, in particular, is a great wine and there are others. Anybody who tasted La Chapelle 1961 remembers it forever. **Steve Harrison (age 73)**
London SE15, UK

OUTLOOK UK

What do we really gain from no-cry onions?



by Harriet Fitch Little

A ragù Genovese is one of the tastiest of Italy's innumerable regional sauces. That it hasn't found favour in the UK is probably because of how the cooking process begins: take a kilo of onions and slice them finely. This makes for a very cheap meal, given a kilo of onions somehow still retails for about £1 in British supermarkets. The downside is that you're unlikely to be able to make it to dinner without shedding a tear.

But salvation is at hand. Reports from Japan this month tell of an onion stripped of its mythical power to make grown cheep weep. The reassuringly named "Smile Ball" has, after a full 20 years of R&D, been rid of the lachrymatory-factor synthase enzyme responsible for inducing tears. It's been available domestically since 2015 and is gaining traction, with production projected to increase more than fivefold to 1,000 tonnes over the next three years.

Nor is it the only anodyne allium making headlines. In the US, researchers at Bayer Crop Science (now owned by BASF) spent 30 years Frankensteining various low-pungency onions to create the "Sunion", which has been on sale at Waitrose in the UK for the past few winters. Here is an onion so sweet and mild (in the words of one early media report, "almost flavourless") that it can't make you cry. Although the onions took different paths into existence – crossbreeding for the Sunion, bombardment with heavy-ion

beams for the Smile Ball – the destination was the same: both have been described as tasting a bit like an apple.

What has humanity gained from a cumulative half-century spent on this endeavour? After all, it's not like the onion was crying out for an access campaign. It is the near-universal foundation stone of savoury cooking, with annual global consumption of about 6kg per person – that's about 37 medium onions (or an admittedly less impressive six rags). The UK grows about 450,000 tonnes a year and is also the largest onion importer in Europe.

And all this research is certainly not breaking down financial barriers. A Smile Ball costs about 75p per onion in Japan, and a Sunion £1.60 for three at Waitrose. Even the Sunion's UK distributor, the Oldershaw Group, has no ambitions to disrupt the wider UK market. Onions are "a very stable category", says director Robert Oldershaw. The Sunion "has its place" within it.

What is that place? If I try to picture it, what comes to mind is a shiny fridge in a smart London apartment block in a "very desirable neighbourhood", named by its developers. In this fridge, the no-cry onions room with the no-chop garlic, the no-prep tenderstem broccoli and the no-cook salmon fillets in their vacuum-packed collars. In short, ingredients that make no demand of your senses until the moment of tasting.

This is not a failing, nor is it in any way unusual. There is no aspect of everyday living that hasn't been rendered similarly frictionless. But with cooking, going the long way round is often more enjoyable. As British food writer Bee Wilson, author of *The Secret of Cooking*, puts it: "It's everyday transformation that we have the opportunity to participate in, in a little window after work and before bed."

Even very simple cooking can provide a moment of full five-sense immersion. Chopping an onion offers sensory feedback: it's really making your eyes water, it is likely very hot and savoury. Maybe use half. Wilson, who is working on a book about cooking using sensory cues, describes this as "using yourself as a measuring device in the kitchen". It's a skill she says we're at risk of losing.

After slicing the onions for your ragù Genovese, you put them in a casserole dish with a smaller quantity of raw beef and some oil. Then, over about four hours, you watch in disbelief as this ugly, pungent ensemble transforms into a jammy, buttery sauce.

Would the end result be as delicious if it began with tear-free, odour-free onions you could snack on raw while you're cooking? Maybe, but I suspect a bit of the magic would be lost. Plus, I know my onions, and I don't want them to taste like apples. **harriet.fitchlittle@ft.com**

Opinion

It's hard for humans to have the final say over AI

TECHNOLOGY

Sarah O'Connor



The riskier the setting in which powerful AI systems are deployed, the more we seem to reach for an intuitive solution that humans should always be the ones to make the final decisions.

In the context of war, the public and regulatory debate (and one source of the recent row between Anthropic and the US government) has focused on the seemingly binary distinction between autonomous weapons and those that are subject to "human control". In the corporate world, too, the deployment of semi-autonomous agents has led companies to turn to experienced humans as the ultimate decision makers. Amazon, for instance, has reportedly said that junior and mid-level software engi-

neers require more senior engineers to sign off AI-assisted changes.

But does this solution necessarily lead to the best of both worlds, in which machines boost speed, accuracy and productivity, while humans supply expertise, context, judgment and accountability?

The good news is that we've been thinking about how best to combine machines and humans for a very long time. As far back as 1951, a psychologist called Paul Fitts devised a list of those things "men are best at" and those that "machines are best at". The bad news is that we don't seem to have learned much from our many mistakes along the way.

The first issue is that AI operates at superhuman speed. On the battlefield, for example, even systems that leave final decisions to humans can churn through mountains of data and vastly increase the number of potential targets to hit. But when so-called "kill chains" are compressed from hours to minutes or even seconds, it calls into question how much real-time control humans can realistically provide.

In the lower-stakes world of the office we are beginning to see a similar phenomenon, as AI agents vastly speed up the pace and volume of work that still has to be directed and reviewed by humans. One eight-month study into generative AI use at a US tech company found that a surge in productivity came with "cognitive fatigue, burnout, and weakened decision making".

Many are inclined to trust machines even when they are warned not to

The second issue is that many humans are inclined to trust machines even when they are warned not to. The phenomenon of "automation bias" has been documented repeatedly in all sorts of settings over the years, from drivers following their GPS systems into rivers to students following robots away from fire exits in a simulated emergency. I have written before about an experi-

ment at Volvo Cars in which almost 50 per cent of people allowed a semi-autonomous car to crash straight into an object in the road.

Last month, two academics at Wharton business school coined the term "cognitive surrender" to describe a phenomenon in which a person simply "relinquishes cognitive control and adopts the AI's judgment as their own". ("Cognitive surrender" is also, incidentally, a good description of what happens to me at about 8pm every evening.)

The third problem is that accountability becomes blurred. Who is to blame when something goes wrong? The temptation will be to blame the human who made the final decision but, if they were operating in a system that was not designed to mitigate the previous two problems, that might not be fair, nor lead to appropriate structural remedies.

Instead, humans might find themselves in what academic Madeleine Clare Eliss has called the "moral crumple zone": "Just as the crumple zone in a car is designed to absorb the force of impact in a crash," she wrote in a paper

in 2019, "the human in a highly complex and automated system may become simply a component – accidentally or intentionally – that bears the brunt of the moral and legal responsibilities when the overall system malfunctions."

These problems are not insurmountable. Indeed, we have already learned a lot about how to mitigate them in certain professions. Airline pilots, for example, have been interacting with automation technology for decades. There have been some disasters along the way, but also a lot of lessons learned, for example in the importance of training pilots on how various modes of automation work (and how they can fail), as well as encouraging them to hand-fly on occasion to maintain their skills.

There is instinctive appeal to the idea that humans must have the final say over these powerful new technologies. But the history of human-machine interaction tells us that is not as easy to achieve as it sounds. What's more, the illusion of human control can be more dangerous than its clear absence.

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Labour must not lose my generation of voters

Chris Curtis

For the past two decades, Britain has been running an experiment in how to weaken the social contract by embedding intergenerational unfairness in its policymaking. Whether intentional or not, decision after decision by governments of all colours has piled more burden on to younger adults while cushioning older generations.

You can see it in our tax system. For many graduates, the amount you lose from each extra pound you earn is shaped more by your age than your salary. If you are in your twenties or thirties like me, you can be paying income tax and national insurance with what feels like a graduate tax on top through student loan repayments. Around the higher-rate threshold that combined hit can mean losing just over half of each additional pound.

Later in life, however, the picture changes. Student loans fall away and once you reach state pension age you stop paying employee national insurance altogether, no matter how high your income.

The same imbalance runs through public spending. We have squeezed support for working-age families while treating the pensions triple lock as a near-sacred object. Of course, pensioners should be protected from poverty. But when one group gets certainty and another gets stealth tax rises and increasing living costs, people notice. And they draw a conclusion about how the system is designed for.

Housing is the starkest example of

Last month's by-election where younger people abandoned the party was a warning shot

polity bias. Britain has failed, year after year, to build enough homes. The English Housing Survey reports that in 2024-25 the average age of first-time buyers in England was 34, up from 32 before the pandemic. Many work hard and save what they can, while their rent swallows the deposit they are trying to build. That doesn't just breed frustration. It changes choices about careers, relationships and whether to have children at all.

It was allowed to get this far because it was politically convenient. Younger people vote less, lobby less and are more likely to move, so their anger is easier to ignore than the organised resistance of those with time, property and a post-code that can block development. It has been easier to squeeze graduates than to confront Nimbysism, and easier to tax than to grapple with wealth.

But eventually the politics still catches up. Last month's by-election result, where younger voters abandoned Labour for the Greens, was a warning shot of what will happen if we don't change course.

YouGov's post-election study of 2024 shows just 13 per cent of under-50s voted Conservative, with Labour capturing 43 per cent of the vote. Young voters could see the deck was stacked against them and wanted a government that would rebuild the bargain.

That created an opportunity for Labour. We have started to respond, not least by putting housing back at the centre of national policy. But too often we still fall into the previous Tory trap and reach for the easy option of asking the same generation to pay more.

The most recent Budget did exactly that, with choices on student loan thresholds that take cash out of young people's pockets. But we can't keep loading costs on to this generation and expect them to turn up for us. They have other choices – they're showing as much at the ballot box. We have to work to earn their votes just as much as those of their parents and grandparents.

Britain has everything to offer young people a genuinely exciting future. But that promise will not be realised until we stop treating them as the balancing item in every fiscal and political calculation and start rebuilding a deal in which effort is rewarded, housing is attainable and opportunity is not rationed by age. If Labour cannot deliver that, younger voters will walk away.

The writer is a Labour MP and a former polling analyst

Why Hormuz will haunt us after war's end

GLOBAL AFFAIRS

Gideon Rachman



That is because the strait's closure creates both an immediate crisis and a long-term strategic quandary. The current problem is that the longer it is closed, the greater the threat of a global recession. The future dilemma is that Iran now knows that control of the Strait of Hormuz gives it a stranglehold over the world economy. Even if it relaxes its grip in the short term, it can tighten it again in future.

The difficulties of reopening the strait are already very apparent. Iran does not have to sink or impede every tanker that tries to pass through. The spate of attacks already carried out – and the threat of new ones – has been enough to persuade ship owners, crews and insurers to steer clear.

Intensive bombing of Iranian military infrastructure – or even a mooted US occupation of Kharg Island, which is crucial to Iran's own oil exports – are not a direct solution to the Hormuz problem. The Islamic republic has many military options to threaten traffic through the strait, including deep-sea mines, missiles, inflatable boats equipped with limpet mines and drones. Iran has particular expertise in drone warfare. Its Shahed drones have been crucial in Russia's war against Ukraine.

Trump is now asking America's allies to send their navies to break the Iranian chokehold on the strait. He has even appealed to Beijing, the UK, the EU and China to do a real interest in reopening the Strait of Hormuz. But they will be understandably reluctant to put their



own forces at risk to solve a problem that they did not create and that the US navy cannot fix on its own.

A year of tariffs, threats and insults from the Trump administration towards its European allies has also burned through goodwill towards Washington. They also know that any navy operating in the Strait of Hormuz would be very vulnerable to Iranian attacks – and might have to keep the operation up over many months.

The US may be considering the use of land forces to try to secure the coasts just off the strait as well. But a decision to deploy ground troops in Iran would inevitably mean higher American casualties and would not guarantee even the limited objective of opening up the strait.

Iran now knows that control of the strait gives it a stranglehold over the world economy

Beyond the immediate crisis lies the longer-term problem. By assassinating the leaders of Iran – and making clear that regime change is a goal of the war – the US and Israel have permanently changed Iran's incentive structure.

Before this latest war, the Iranian regime still had a motive to avoid the all-out confrontation with the US that would be the inevitable consequence of closing the strait. But now Iran's thinking has changed. As Sir Simon Gass, a former British ambassador to Tehran, put it to me, Trump's effort to overthrow the Iranian government "is the moment at which the regime concludes that this is potentially a fight to the death and that therefore they have to use all of the tools at their disposal and closing the Strait of Hormuz is one".

Iranian moderates, who once argued for diplomacy with the west rather than all-out confrontation, may have been permanently undermined by the fact that the US attacked while negotiations were still under way. Even if the Islamic republic decides, at some point, that it has an interest in reopening the Strait of

Hormuz – it will always want to retain the option of closing it again as a visible threat to ward off aggressors.

The US and Iran's wealthy Gulf neighbours – who continue to face daily drone and missile attacks – will therefore face a long-term dilemma. Do they try to reach an accommodation with the current hardline Iranian regime, in the hope of persuading it never to close the strait again? Or do they press even harder for regime change in Iran, accepting all the associated dangers of prolonged military conflict and regional chaos?

The Islamic republic is currently taking a massive economic and military battering. But having demonstrated to the world – and to itself – that the closure of the Strait of Hormuz is a genuine and actionable threat, Iran has discovered a powerful future deterrent that is quite independent of nuclear weapons. If the regime survives this war, it may yet emerge in a stronger position internationally.

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Who is winning the Middle East conflict?

Emile Hokayem

War is the ultimate crash course. People who never knew the difference between an AK-47 and an M4 rifle are now versed in the intricacies of air defence systems; those unlucky enough to be close to the action learn to differentiate between an incoming ballistic missile landing on target and its interception.

The first military phase of the US-Israel campaign against Iran – which was pre-planned, highly scripted and methodical in its execution – appears to be coming to a close. Judging by the figures, the operational success of the campaign is indeed stunning. Having established air superiority, it involved hundreds of US and Israeli aircraft, two aircraft carriers, cruise and ballistic missiles and more.

Having been on the receiving end of

more than 15,000 strikes in just two weeks, Iran's leadership and infrastructure losses have been staggering. US and Israeli officials offer optimistic figures about how many missiles and launchers have been destroyed on the ground.

So who is winning so far? The man with access to the best intelligence available, Donald Trump, insists that the US and Israel are clearly winning, before bemoaning that the Islamic republic is not caving. Pure metrics and technological supremacy, it turns out, don't tell the whole story about a war's trajectory. Rushing a Marine Expeditionary Unit from Okinawa, moving air defence systems from the Korean peninsula and urging navies from ambivalent if not unfriendly countries to deploy in the Gulf region are not a sign of panic given Washington's massive capabilities. But they are not indicators of sound forecasting and well-thought-through planning either. For every gung-ho retired general on television, there is another quiet one shaking his head.

Reactive defence requires resources and the sustainment burden will be significant and politically controversial.

How many ships can be devoted to escorting tankers and will any other nations help? How many aircraft and drones can be kept in the air at all times?

Good strategy is the alignment of ends and means. By that standard, the Iranians haven't done badly. Lacking the ability to defend itself, Tehran has chosen to impose a high cost all around and

Tehran is unlikely to back down, because it retains advantages: geography, time and tolerance for pain

its focus has been deliberate. Israel has been hit, but it is a less important target at present with depleted missile capabilities. Iran cannot achieve decisive effect against a better-protected country with a hardened population. Instead, the nearby UAE has borne the brunt of Tehran's retaliation, followed by Kuwait and Bahrain. High on the list has been energy infrastructure, from production and refining to loading and transport.

Saudi Arabia has comparatively been spared, although one-third of the drones fired at the kingdom has targeted the crucial oil site of Shaybah. Above all, Iran's ability to paralyse maritime traffic in the Strait of Hormuz has defied expectations that the US had gamed this war out. Showings high interception rates and reduced incoming projectiles don't say how many interceptors have been used up or whether Iranian targeting has improved.

Modern interstate warfare is no longer primarily about the frontline, it is about what happens in the rear. Russia's invasion of Ukraine and the latter's valiant defence show how faulty assumptions can deny military victory to the force that is strongest on paper; how no single or specific range of weapons systems can be decisive; how adaptation and innovation give temporary advantage before being matched or overcome by the other side; how social resilience underpins military power.

What will phase two of the war look like? For Israel, the focus will be on the continued destruction of Iran's military infrastructure and greater targeting of

its coercive apparatus to weaken the Revolutionary Guards and its associated militia, the Basij Force. For the US, the goal will be to restore maritime traffic, defend its Arab partners better than to date and adapt to Iran's own adaptations. For Iran, it could involve weapons we have not seen deployed much. One of the mysteries of the war is why it has not fired more of its cruise missiles. The optimistic answer is that they have been largely destroyed; the likelier one is that Iran has held many back as they are a particularly useful capability for close combat in the Strait of Hormuz.

After the beating it has taken, the Iranian regime is unlikely to back down because it retains several advantages: geography, time and asymmetry. Iran can target more countries and areas from more positions. The longer the war goes on, the greater the cost to everyone else – and the Iranian regime has superior pain tolerance. When survival is the goal, anything goes.

The writer is director of regional security at The International Institute for Strategic Studies

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Indian Newspapers:

- | | |
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| <u>3) Business line</u> | <u>8) Financial Express</u> |
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EDITORIALS

Don't cry for me in November. Primary election day is what matters most in this state

Here's the thing about primary elections in the Land of Lincoln and, especially in the Democratic stronghold that is the city of Chicago: In race after race, they are not the appetizer course but the entire prix fixe. The whole kit and caboodle. By Wednesday, the determination of our collective destiny will be all over, bar the shouting.

The general election in November? It might matter in the race for Illinois governor and in a select few statehouse contests. But in most of the races in which we've been endorsing these last several weeks, the winner of the primary will be a shoo-in come the fall and there will be little a free-thinking voter can do. In our gerrymandered state, the opposition party will not have fielded a competitive candidate. Most likely, they will barely have fielded a candidate at all.

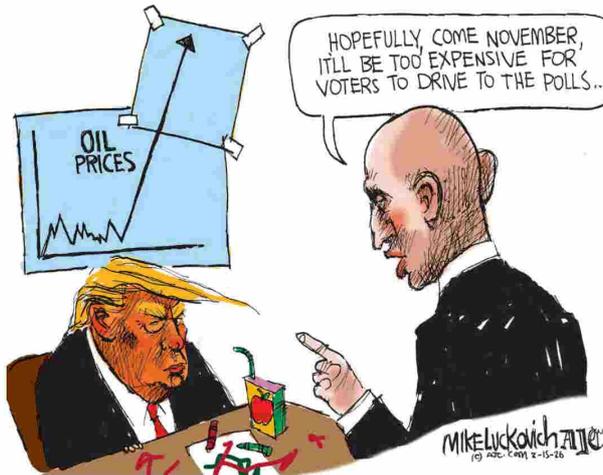
We've often bemoaned this disenfranchising state of our democracy but Election Day is not the time to do so again.

We're here to encourage you to vote.

And that will mean ignoring a whole lot of noise. For, as a result of the centrality of these primaries, the races have thrown up all manner of distractions.

Consider (or, rather, don't consider) the dueling endorsement insinuations from both Lt. Gov. Juliana Stratton and Rep. Robin Kelly that Barack Obama is in their corner in their quest to become a U.S. senator, even though the former president actually had endorsed them in different, prior races.

As the clock ticked down, the endorsement business got yet weirder than that, with Stratton further claiming to have been endorsed by the late Rev. Jesse Jackson, who is of course no longer around to confirm or deny any such intent. That prompted his son, former Rep. Jesse Jackson Jr., to say that his dad was interested only in supporting his own children, which would have



seemed like a simple family statement except that the younger Jackson also is running for his old 2nd District seat in Congress and has, you might say, a vested interest in those familial bonds.

We've bemoaned the amount of outside cash influencing these races, even as we have urged voters and candidates not to focus so much on campaign finance. Still, following the trail of such deep-pocketed groups as the American Israel Public Affairs Committee would challenge any detective. AIPAC money is, to say the least, invested strategically, often to support candidate X in order to stop candidate Y, even as candidate Z decries it in others while having once having accepted it

themselves. All of this has played out to such a Byzantine extent that it feels like that lobbying group is playing a chess game of its own invention. In at least five dimensions.

Some would argue, of course, that the outsize focus on this one group (as distinct from the rich crypto crew) reflects a latent antisemitism, even as others argue that it is near tantamount to interference in a domestic election by a foreign government. You will have to decide. Maybe, like us, you worry that such money and your vote are too unequal in power. Maybe you plan to play a similarly realpolitik game yourself. We would not blame you.

A similar decision is required

when it comes to those positions with influence on how much property tax you pay, such as the Cook County assessor and the Board of Review. Should those candidates accept donations from attorneys with business before them? Some would say, some did say to us, that's just democracy in action and those are the interested parties, entitled to support their preferred candidate as the system dictates. Others see good, old-fashioned corruption.

Meanwhile, we watched as one congressional candidate, Kat Abughazaleh, first told us she was coming to talk to us at our endorsement meeting, then sent a surrogate with a theatrical statement on his phone, which

he read awkwardly to us while his boss released a TikTok. Like much else Abughazaleh did, it was designed to gain attention.

Race, in case you haven't noticed, still is red hot in Chicago politics. "Two Black female candidates may split Democratic primary voters in Illinois," read a headline in The New York Times, "and anger is growing at well-funded efforts to widen the divide."

That's a weirdly reductive header at best and a pernicious one at worst, and the lead of the story was no better: "Only five Black women have ever served in the Senate, and Democrats who are trying to elect a sixth this year in Illinois worry that the chance may be squandered."

Squandered?

Yes, Stratton and Kelly are well-qualified Black women running for Congress, but surely that should be celebrated rather than discouraged, especially since their leading rival, Rep. Raja Krishnamoorthi, is not exactly some white guy with a golden retriever as a prop. Rep. Danny K. Davis was right when he said there was "no way around" the reality that some would vote for one Black female candidate and some for another, but he might have helpfully added, "nor should there be," since the presence of both women reflects strength in diversity. We suggest you ignore all of that nonsense and choose the candidate you think will represent you the best.

That happens to be our view in all of the races.

You can't do anything about gerrymandering at Tuesday's election. But guess what it makes it worse? When only a fraction of eligible voters decide all-important primaries.

So, head to the polls, folks. If you are interested in our endorsements, we've got 'em for you online.

But we'd rather you voted against all of them than not vote at all.

Grab the scissors. Our 'bedsheet ballot' is here.

Here are the Chicago Tribune endorsements in the March 17 primary election. Endorsements are made only in contested races.

TAKE THIS WITH YOU THE VOTING BOOTH. (Yes, it's legal.)

U.S. CONGRESS

1st District Republican: No endorsement
2nd District Democrat: Donna Miller
5th District Democrat: Mike Quigley
5th District Republican: No endorsement
6th District Democrat: Sean Casten
6th District Republican: Niki Conforti
7th District Democrat: Dr. Thomas Fisher
7th District Republican: No endorsement
8th District Democrat: Melissa Bean
8th District Republican: Jennifer Davis
9th District Democrat: Laura Fine
9th District Republican: John Elleson
10th District Democrat: Brad Schneider
11th District Republican: Jeff Walter
13th District Democrat: Nikk Budzinski
13th District Republican: Joshua Loyd
14th District Republican: No endorsement
15th District Democrat: Paul Davis
15th District Republican: John Bowby
17th District Republican: Dillon Vancil

STATEWIDE

Comptroller Democrat: Margaret Croke
Secretary of State Republican: Diane Harris

ILLINOIS STATE SENATE

6th Senate Democrat: Nick Uniejewski
9th Senate Democrat: Patrick Hanley
14th Senate Democrat: Ahmed Karrar
33rd Senate Republican: Jessica Breugelmans
36th Senate Republican: Brad Beekman
56th Senate Democrat: Kevin Hall
59th Senate Republican: Paul Jacobs

ILLINOIS STATE HOUSE

1st House Democrat: Guadalupe Rivera
4th House Democrat: Lilian Jimenez
8th House Democrat: Jill Bush
12th House Democrat: Paul Kendrick
13th House Democrat: James O'Brien
26th House Democrat: Kam Buckner
34th House Democrat: Cleopatra "Cleo" Cowley
35th House Republican: Charles "Chuck" Lay
40th House Democrat: Jaime Andrade Jr.
42nd House Democrat: Margaret DeLaRosa
52nd House Democrat: Maria Peterson
76th House Republican: Liz Bishop
84th House Democrat: Saba Haider
89th House Republican: Tony McCombie
94th House Republican: Norine Hammond
107th House Republican: Brad Halbrook
109th House Republican: Charles Meier
116th House Republican: Dave Severin
118th House Republican: Scott Doody

COOK COUNTY

Board president: Brendan Reilly
Assessor: Fritz Kaegi
Board of Review District 1: Juanita Irazzary
Board of Review District 2: No endorsement

COOK COUNTY BOARD OF COMMISSIONERS

2nd District Democrat: Michael Scott Jr.
5th District Democrat: Kisha McCaskill
6th District Democrat: Patricia Joan "Trish" Murphy
8th District Democrat: Jessica Vásquez
10th District Democrat: Bridget Gainer
12th District Democrat: Elizabeth Granato
15th District Republican: Gabriella Hoxie
16th District Democrat: Miranda Hernández

METROPOLITAN WATER RECLAMATION DISTRICT

Beth McElroy Kirkwood
Precious Brady-Davis
Eira L. Corral Sepúlveda

Due to a corporate edict, the Tribune cannot formally endorse in the GOP gubernatorial and U.S. Senate races. Readers are directed to chicagotribune.com/ opinion for our thoughts on these races.

OPINION



President Donald Trump on his way to the White House after his arrival on Air Force One at Joint Base Andrews, Maryland, on Wednesday. LUIS M. ALVAREZ/AP

The war in Iran is beginning to grate on Donald Trump



Daniel DePetris

Deep into its third week, the war in Iran is beginning to chafe President Donald Trump's wider foreign policy and domestic agenda. Trump, who is often immune from the types of repercussions other politicians typically face, now has his back against the wall as gas prices continue to rise, the global oil supply dwindles and lawmakers on Capitol Hill get increasingly antsy about why the United States needed to bomb Iran in the first place.

Based solely on military metrics, the United States has plenty of accomplishments to brag about. According to the Pentagon, Iranian ballistic missile launches are down by 90%. Iranian drone attacks have been reduced even more. Approximately 100 Iranian naval vessels have been destroyed, and it's safe to bet more will be hit by the time this column goes to press. Kharg Island, where the vast majority of Iran's crude oil is exported, is now in the Trump administration's crosshairs as it seeks to strangle Tehran's economy even further.

Yet nobody discounted the U.S. military's might. Even the most die-hard anti-American cleric in the Iranian political system did not harbor illusions that Iran could defeat the United States in conventional ways. What Iran is able to do, however, is use asymmet-

ric tactics to make the war as economically and politically painful for Trump as possible. Iran's whole war strategy revolves around targeting the Persian Gulf's energy facilities, deterring oil tankers from using the normally busy Strait of Hormuz and driving up energy prices so that Americans feel it in their wallets. That economic turbulence, the logic goes, would then create political problems for Trump at home with midterm elections less than eight months away.

Based on the statistics, Iran's strategy is working. About 100 tankers are stranded on either end of the Strait of Hormuz, bottling up traffic. Global oil supply will decline by 8 million barrels per day this month, according to the International Energy Agency, a consequence of producers such as Iraq and the United Arab Emirates shutting down production and oil-carrying cargo ships staying put. Hovering around \$100 a barrel, global oil prices are up by nearly 50% from a month ago. At the time of writing, a gallon of regular gas was 78 cents higher than it was a month ago.

For a president who railed at predecessor Joe Biden for high inflation and high fuel costs, these developments are awkward to say the least. Even Republican lawmakers normally eager to repeat the White House's political messaging can't deny the fact that thinner wallets aren't exactly great for the party's election prospects.

Trump administration officials spent their Sunday morning jumping on the political shows and trying to reassure

Americans that everything will be back to normal once the war is over. But that message goes only so far given the fact that Trump himself has been scatterbrained about when that date will come, what his definition of victory is and what he's even trying to accomplish.

Despite attempts at damage control, the war is not going according to plan. Inexplicably, the White House seemed caught off guard that Iran, with its leaders seeking sheer survival, would quickly escalate by taking shots at the Middle East's oil infrastructure and clogging up the region's key waterway. Trump, perhaps recognizing his initial assumptions were wildly off the mark, is now scrambling to reopen the strait by pressuring everybody from NATO to China to get more involved. Those calls have been met with eye-rolling and righteous indignation.

"This is not our war, we have not started it," German Defense Minister Boris Pistorius replied after Trump read the riot act to NATO countries. It's the height of irony that Trump, who not so long ago berated United Kingdom Prime Minister Keir Starmer for refusing to support the U.S. bombing campaign in its opening days, is now begging Starmer to send more British warships to the Gulf.

There are geopolitical factors to consider as well. The war is beginning to compromise some of the other aspects of Trump's foreign policy. Because Iran is deliberately squeezing the oil supply, the Trump administration has been forced to enact measures to cushion some of the blow. In early

March, the U.S. Treasury Department permitted India to purchase Russian crude oil at sea. On Thursday, the White House expanded that country-specific waiver worldwide: Russian oil on tankers can now be purchased for a 30-day period. The move is designed to make up for some of the Middle East's shortfall. The problem is that Russian President Vladimir Putin will now be earning more cash, perhaps as much as \$150 million a day, that could be repurposed for his war in Ukraine. This, in turn, will further complicate Trump's efforts to end the conflict.

Washington's China policy could be affected as well. Trump is now threatening to delay his summit with Chinese President Xi Jinping later this month if Beijing doesn't help unplug the Strait of Hormuz. Yet the Chinese choosing to do favors for Trump is difficult to imagine. And if the summit is postponed, the one-year trade and tariff truce Trump and Xi negotiated last year could be at risk of falling apart. If you think the global economy is chaotic today, just wait until the world's two largest economies slap each other with sky-high tariff rates and export controls again.

As boxer Mike Tyson once said, "Everybody has a plan until they get punched in the face." This applies to war as well.

Unfortunately, Trump's plan has been upended, and he's forced to find a new one on the fly.

Daniel DePetris is a fellow at Defense Priorities and a foreign affairs columnist for the Chicago Tribune.

Chicago should stop waiting for the old downtown to return

By Liam Stanton
SPECIAL TO THE TRIBUNE

For the past few years, Chicago's downtown debate has focused on one question: When will workers come back?

That is a worthwhile goal. Office vacancy in the Loop remains high, and many buildings are still operating far below their pre-pandemic occupancy. Some recovery will happen, and we should continue encouraging it.

But the idea that downtown will simply return to the way it looked in 2019 is increasingly unrealistic.

Great cities don't wait for the past. They build what comes next.

Cities around the world are already showing what that looks like. Montreal leaned into winter with festivals that draw huge crowds during the coldest months. Vienna's Christmas markets stretch across multiple plazas and streets. Melbourne revitalized its center by activating small laneways with cafes, art and nightlife. New York transformed Bryant Park from a troubled public space into one of the busiest urban parks in America through constant programming and seasonal markets.

These cities did not wait for old patterns to return. They redesigned downtown for how people live now.

Chicago should do the same. Chicago's Loop remains one of the most extraordinary urban places in the world. The architecture, the river, the transit network



People cross a busy Michigan Avenue crosswalk at Lake Street during rush hour Nov. 6, 2019. ANTONIO PEREZ/CHICAGO TRIBUNE

and the cultural institutions are unmatched. But downtown can no longer depend primarily on people who are required to be there for work.

The next chapter of the Loop has to be about people choosing to be there.

We also have to be honest about our constraints. Chicago faces serious fiscal challenges, and we are not in a position to solve downtown's future with massive new spending. That means the answer isn't large new construction projects. It's creativity — and making better use of the extraordinary assets we already have.

The first step is embracing something we often treat as a disadvantage: winter.

Chicago already hosts the Christkindlmarket in Daley Plaza,

one of the city's most beloved traditions. But the concept should expand beyond a single plaza that is often too crowded. Additional markets, lighting and winter programming across nearby streets could encourage visitors to explore multiple blocks rather than visiting one location and leaving. Why shouldn't we host the nation's premier winter markets?

Cities across Europe have shown that winter can become one of downtown's most vibrant seasons when it is designed well.

Second, downtown Chicago needs more life after 5 p.m. Today, the Loop often empties when the workday ends. That pattern made sense when downtown was primarily an office district. It makes far less sense in a hybrid-work world.

Chicago should establish a "Loop Nights" program — predictable evening programming from Thursday through Saturday featuring music, food markets, public art and neighborhood festivals. One place to start would be rethinking our restrictions on food carts. Chicago is famous for its neighborhood food culture, yet we make it illegal for vendors to prepare food on a cart. How about, for a few nights a month, we invite some of the best neighborhood restaurants and vendors to pop up in carts in the Loop? Maybe accompanied by a small concert as late as those that sprouted organically during pandemic times?

Cities that recovered fastest after the pandemic did something simple: They gave people reasons to come downtown at night.

And when more people are present, safety improves. Well-lit streets, active storefronts and steady foot traffic create environments where people feel comfortable spending time.

Third, Chicago should unlock one of its most unique assets: its alleys.

Few cities in the world have a network like Chicago's. Instead of treating alleys only as service corridors, the city should pilot programs allowing cafes, small bars and art installations in select locations.

With lighting, murals and seating, these spaces could become hidden destinations — the kind of discovery that makes cities memorable. Melbourne's laneways helped transform its downtown

economy, and cities such as Tokyo show how small, tucked-away spaces can become vibrant destinations.

Chicago's alleys could do the same.

Fourth, we should make downtown easier for small businesses to experiment.

Too many storefronts sit empty while entrepreneurs struggle with permits and costs. Chicago should create a fast-track pop-up permit allowing temporary retail, restaurants and cultural spaces to open in weeks rather than months. This would turn vacant storefronts into laboratories for new businesses instead of symbols of decline.

None of these ideas require reinventing Chicago. They require something simpler: connecting what already works and making downtown a place where people gather, not just a place where they work.

The Loop will always be the economic heart of Chicago. But its future will depend just as much on families visiting for the day, friends meeting for dinner, tourists exploring the riverfront and neighbors coming downtown for events.

For too long, we have been waiting for the old downtown to return. Chicago shouldn't wait. It should start building the next one.

Liam Stanton is a lifelong Chicagoan, small business owner and founder of The Chicago Style Project, a neighborhood advocacy group. He is running to be the 58th mayor of Chicago.

OPINION

Why Donald Trump's war could play into China's hands

By Lyle Goldstein
SPECIAL TO THE TRIBUNE

There are many plausible rationales for the U.S.-Israel war against Iran. Some proponents have even suggested that one goal is to deal a blow against China.

Former Secretary of State Mike Pompeo argues: "If this regime falls and gives way to a government that actually represents the will of the Iranian people, Beijing can say goodbye to the cheap shipments of crude oil that have helped power its economy."

Pompeo added: "But more than that, it will lose a critical foothold from which to project power in the region and undermine U.S. interests."

This is almost certainly untrue. Pompeo and those who agree with him fail to understand China-Iran relations and how Beijing might actually benefit from the current war.

Let's first consider Pompeo's claims about the Chinese economy. In fact, Moscow is a much bigger supplier of oil to Beijing than Tehran. Further, the war is well timed for both Russia and China. Because India has been reducing its imports of Russian oil to satisfy the demands of President Donald Trump's administration, the spare oil on the market will most likely find its way to China instead.

Moscow has been eager to expand its energy relationship with Beijing, an act that will provide lifeblood to Russia's economy. While major projects such as the Power of Siberia 2 pipeline have been on hold for some years, the Iran war will likely help Moscow's case for this new energy linkage. Beijing has taken some prudent steps in the present crisis to adjust its energy policies, but one reason China has been tepid on a new major oil pipeline from Russia is that China's thirst for oil has plateaued in recent years, and it even declined in 2024.

Problems in the Persian Gulf, moreover, are likely to give further impetus to China-Russia energy cooperation in the Arctic, since the Northern Sea Route has always been advertised in both countries as an alternative to the volatile route from the Middle East. It should also be kept in



A family arrives at a gathering in Tehran on March 5 to mourn the killing of Ayatollah Ali Khamenei. The attacks by U.S. and Israeli forces on Iran, including the assassination of the country's supreme leader, are confirming Xi Jinping's worldview that hard power is king. **ARASH KAMOOSHI/THE NEW YORK TIMES**

mind that China has developed a rail corridor that connects to Iran via Central Asia. There is additionally some limited evidence that Iran will permit Chinese shipping to pass through the Strait of Hormuz, while vessels of the U.S. and its allies will not be permitted to do so.

Pompeo also seems unaware that Beijing has spent the last couple of years topping off its large strategic petroleum reserves. The U.S. economy is likely to be hurt by quickly rising energy prices, and it's not at all clear that China will be hit harder, especially given America's inflation troubles.

Pompeo further claims that China will lose a strategic foothold for projecting power in the Middle East thanks to the Iran war, and this deserves close scrutiny.

Despite much speculation, China maintains no military bases in Iran or in the Persian Gulf area. True, there has been a series of joint naval exercises involving Iran, China and Russia, but these have been exceedingly small in scale with just a handful of warships. It's also notable that Iran has, for several decades, not imported a single major weapon system from China. In short, China's military relationship with Iran remains of minor significance.

In addition, China has decent relationships with many states that are rivals of Iran, for example Saudi Arabia, the United Arab Emirates and even Israel. There are thus very few signs that Beijing is on the verge of "projecting power" into the Middle East. China may even stand to bene-

fit militarily from the U.S.-Iran war, contrary to what Pompeo supposes. At the soft power level, China will gain prestige and influence, since it will appear in the eyes of much of the world as a restrained great power upholding the status quo — quite the contrast to the U.S., which is increasingly viewed as having gone rogue.

From a narrowly military-strategic perspective, China will benefit from the fact that more U.S. forces may shift from the Asia-Pacific into the Middle East, and U.S. military munitions stocks are likely to be further denuded. Also, Chinese strategists will get yet another chance to closely study U.S. military technologies and doctrines — and any weaknesses that could become apparent.

This final point is disturbing and raises the troubling possibility

that, should the U.S. dedicate serious effort to suppressing Chinese ambitions, Beijing may choose to participate more actively in proxy wars against the U.S. Already there are some concerns about intelligence sharing, for example, as Chinese satellite photos of U.S. military bases and deployments have been posted to the internet, and these photos are quite possibly aiding Iranian targeting.

China has traditionally sought to emphasize commerce and play peacemaker, avoiding risky involvement in regional conflicts. But if U.S. leaders continue to treat Beijing as an adversary, then soon it might start playing that role more actively.

Lyle Goldstein is director of the Asia Program at Defense Priorities.

Voice of the People

Election laws broken

The Tribune Editorial Board gave us an excellent synopsis of how broken our elections are in Illinois in its March 9 editorial ("Why independent candidates rarely make the ballot in Illinois").

It's not just independents who have to deal with these ridiculous requirements. This impacts parties like the Libertarian Party, the Green Party, the Democratic Socialists of America, the Party for Socialism and Liberation, and so on.

The Libertarian Party of Illinois and the Illinois Green Party have been working with legislators since at least 2013 to reform these election laws.

The first step is reducing the petitioning threshold to equal that of Democrats and Republicans. The second step, which wasn't introduced until 2016, is reducing the threshold for minor/recognized party status from 5% to more reasonable rate in line with Missouri and Iowa at 2% or to what the current average is across the entire Midwest at 3%.

To date, it hasn't gotten anywhere due to the old General Assembly regime (Michael Madigan and John Cullerton) and the current regime (House Speaker Emanuel "Chris" Welch and Senate President Don Harmon). The bills haven't been allowed to leave the Rules Committee in the House or whichever committee the bills are assigned from in the Senate.

Libertarians have also had to fight that same fight since 2020 in Cook County alone, and their growing support since that election is nothing short of remarkable.

Just keep in mind that if you don't like the Democratic and Republican choices for public offices at the county level, feel free to pull a Libertarian ballot. — Jake Leonard, political director, Libertarian Party of Illinois, Nokomis

Any good candidates?

After watching endless attacks by political rivals on TV, I'm wondering if there are any candidates running who are



Janeen Bass, right, manager of customer service ethics, pulls out the Libertarian Party label, winning the third and final placement, during the Ballot Position Lottery for an upcoming election Aug. 17, 2022. The Democratic Party won the first placement, the Republican Party won second and Libertarians finished third. **ANTONIO PEREZ/CHICAGO TRIBUNE**

honest, morally principled, not in Trump's control, not in favor of Immigration and Customs Enforcement, and otherwise truthful and deserving of the public's trust.

Is this any way to conduct elections for public offices? — Michael Dolesh, Chicago

Ohio versus Illinois

I was born in Chicago but have lived most of my life in Ohio. I recognize my native state has quite a history of political shenanigans. But Illinois is in the middle of a good run of competent government without a focus on scandalous intrigue. The development is demonstrated by the fact that the biggest election year issue highlighted in the Tribune's lead Sunday article ("Lessons in finance, Pritzker's power") is the extent of Gov. JB Pritzker's political influence in a U.S. Senate primary.

Compare that to Ohio where we are in the midst of perhaps the biggest political corruption trial in history. The case has it all — backroom deals, bribes, tainted legislation, dark money contributions — even the suicide of a prominent official at the center of the scandal. We have a

utility company and executives accused of bribery and who just can't seem to recall conversations critical to perhaps the biggest corruption trial in Ohio history.

Illinois may have its corrupt political past, but Ohio is living in the corrupt present.

I now tell my Chicago relatives to enjoy what they have.

— Stephen Gladstone, Shaker Heights, Ohio

Slanted headline

On March 12, there was a terrifying attack on Temple Israel, a synagogue in West Bloomfield Township, Michigan. There were over 100 young children attending preschool at the time. Thanks to the heroic acts of security, well-prepared staff, police and emergency responders, no one died except the attacker.

The attack was a shock, but not a surprise, as acts of antisemitism have been on the rise. American Jews have been bracing themselves for further violence since the war in Iran started.

Sadly, I believe Americans have become numb to the increasingly common acts of terror that have plagued our country in recent years. A terrorist attack hardly gets notice if multiple victims aren't killed.

So I wasn't surprised when the Tribune reported the Temple Israel attack in the Nation & World section of the paper.

However, I was troubled when I saw the front-page headline on March 14 that read "Michigan suspect lost family in Israeli strike." The article itself is objective and fact-based. But the headline strikes me as biased, implying justification for this act of terrorism.

Many readers never go beyond a headline. Journalists and editors have a responsibility to be balanced in their reporting. This time, they missed their mark.

— Rebecca Jacobson, Highland Park

Bad advice to grads

I cannot agree with Jonathan Zimmerman ("NYU's decision to air prerecorded graduation speeches is cowardly," March 15). A graduation speech should be memorable for being inspirational, pithy and blessedly concise. A speech should congratulate the graduates, encourage them to work hard, enjoy their chosen fields of industry and service, and live with moral uprightness. His advice — "Submit one speech (to the administration), and give another" — frames the speaker as one who is unreliable and whose word cannot be trusted.

This is called lying, hardly advice to emulate. — Pamela J. Pugh, Hamlet, Illinois

Call out censorship

The op-ed by Jonathan Zimmerman reminds me of four years ago when I saw New York University alumnus Adam Sandler give a commencement address at its Tisch School.

Sandler was heartfelt and sincere, but there were plenty of "Sandler" moments guaranteed to offend everyone.

I hope the next celebrity alumnus that NYU invites to give a presumably live, unrecorded, unvetted commencement speech to its graduating class has enough courage to call out this censorship of student thought and message control for what it is. Shame! — Mike Hughes, Chicago

Jobs at what cost?

I don't know what the future will hold for Elwood, but my friend in Dekalb, west of where a data center has been built, says her electric bill went up 85% last year.

What good is having the jobs there if you can't breathe? Or having your taxes lowered if you can't drink the water, if there is any to drink?

— Georgiana Dodd, Homewood

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