



All animals need equal consideration

Majority of India's gig workers remain out of govt.'s reach

Text & Context

THE HINDU

NEWS IN NUMBERS

Jharkhand districts in which flash flood alerts were issued

10 The Jharkhand weather department has issued a flash flood warning for 10 districts as heavy rain lashed large parts of the State on Tuesday. Dumaria in East Singhbhum registered the highest 217 mm of rain since Monday, the India Meteorological Department said. PTI

Onion stock for PDS that reached Chennai via Kanda Express

840 in tonnes. The second 'Kanda Express' — a dedicated railway rake carrying 840 tonne of onion from the buffer stock — reached Chennai on August 31, with the Tamil Nadu government planning to distribute 1 kg onion per ration card via the Public Distribution System (PDS). PTI

Number of corruption cases pending trial as of December 2025

7,229 As of December 31, 2025, a total of 7,229 corruption cases probed by the CBI were pending trial in courts, including 409 cases pending for more than 20 years, according to the Central Vigilance Commission's 2025 annual report. PTI

Keralam's monsoon rainfall deficit from June to August

22 in per cent. Keralam received 1,367.1 mm of rainfall during the southwest monsoon from June 1 to August 31, 2026, which was 22% below the normal rainfall of 1,746.8 mm, according to IMD data. Wayanad recorded the highest deficit among districts at 50 per cent, followed by Idukki at 44%. PTI

Share of asylum requests denied in the U.S. in June 2026

94.1 in per cent. U.S. immigration court data showed that 94.1% of asylum cases were denied in June 2026, while only 5.5% were granted, according to figures reported by the Transactional Records Access Clearinghouse (TRAC). PTI
COMPILED BY THE HINDU DATA TEAM

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Untouchability and the idea of ‘purity’

How does Indian law define ‘untouchability’? How has the Supreme Court interpreted ‘purity and pollution’? What did the Rajasthan High Court rule on purification? What facts would determine whether the Haldwani ritual amounted to untouchability?

LETTER & SPIRIT

Sahil Hussain Chaudhury

The story so far:

A *shuddhikaran* (purification) ritual was performed at Haldwani’s Ramlila ground on August 10, two days after Congress president Mallikarjun Kharge addressed a rally there. Mr. Kharge said the ritual made him feel the “sting of untouchability” and sought legal action, while the organisation that performed it offered a different explanation, citing slogans allegedly raised during the rally and Mr. Kharge’s earlier political remarks. The dispute raises a legal question beyond the immediate controversy: what does Indian law regard as untouchability when the alleged wrong is not denial of entry, but the “purification” of a place after a Dalit person has used it?

What does the law prohibit?

Article 17 of the Constitution declares that “untouchability” is abolished”, forbids its practice “in any form”, and says that enforcing any disability arising from untouchability shall be an offence punishable in accordance with law. The Supreme Court has recognised that Article 17 is enforceable against non-State actors as well.

The Constitution does not define “untouchability”.

Parliament gave effect to Article 17 through the Untouchability (Offences) Act, 1955, which was substantially amended and renamed the Protection of Civil Rights Act, 1955 in 1976. The Act punishes the preaching and practice of untouchability and the enforcement of disabilities arising from it.

Some of its provisions address familiar forms of untouchability: preventing entry into a place of worship, imposing social disabilities, or discriminating in access to public facilities and services. But the law is not confined to physically keeping somebody out. Section 7(1)(d) also punishes a person who “insults or attempts to insult, on the ground of ‘untouchability’, a member of a



Show of dissent: Congress workers march towards the Uttarakhand Secretariat in Dehradun on Tuesday, protesting a ‘purification’ ceremony at the venue of Mallikarjun Kharge’s Haldwani rally. PTI

Scheduled Caste”.

The law can reach conduct beyond denial of access, but the fact that an act affects or humiliates a Scheduled Caste person does not by itself answer whether Section 7(1)(d) is attracted. The provision requires the insult to be “on the ground of ‘untouchability’”.

How has the Supreme Court interpreted Article 17?

The Supreme Court addressed the scope of Article 17 in *Sukanya Shantha v Union of India* (2024), while striking down caste-discriminatory provisions in prison manuals and reviewing its earlier Article 17 jurisprudence.

The court described untouchability as connected to the caste system and its interconnected notions of “purity and pollution”. These ideas, it said, have been used to reinforce caste hierarchy and influence whom people associate with and how they treat one another. Article 17 rejects such notions.

The judgment also explains why the absence of a definition does not necessarily confine the scope of Article 17. It noted that even a broadly worded definition could become restrictive because discrimination can manifest itself through the “manifold complexities” of social life. Article 17 must therefore be capable of reaching untouchability in its

different forms and manifestations.

The court then stated the principle directly: “There cannot be any stigma attached to the existence, touch or presence of any person.”

The court’s reasoning is therefore not confined to familiar forms of exclusion. It also addresses the underlying caste idea of pollution: discriminatory treatment based on a person’s touch or presence.

What has the court said about such practices?

In *Surya Narayan Choudhary v State of Rajasthan* (1988), the Rajasthan High Court considered discrimination against Dalit devotees at the public Shrinathji temple in Nathdwara.

The court was told that Dalit devotees were permitted to enter only after undergoing a process of purification.

Crucially, the High Court held that Dalit devotees could not be subjected to an additional condition for temple entry that did not apply to other devotees, and specifically directed that the reported purification practice be discontinued, holding it discriminatory and violative of Articles 14, 15 and 17.

At Nathdwara, purification was imposed on Dalit devotees before they could enter a temple on equal terms. At Haldwani, the ritual occurred after Mr. Kharge had already used the venue, and

the reason for it is disputed. The *Surya Narayan Choudhary* case therefore does not decide the present controversy; it establishes the narrower proposition that caste-specific ritual purification imposed on Dalits as a condition of equal access can violate Article 17.

Where is the legal boundary?

Article 17 and the Protection of Civil Rights Act must also be distinguished from the Scheduled Castes and Scheduled Tribes (Prevention of Atrocities) Act, 1989, which creates separate criminal offences with their own ingredients.

Section 3(1)(r), for example, deals with intentionally insulting or intimidating an SC/ST member with intent to humiliate them in a place within public view, when committed by a person who is not an SC or ST. In *Hitesh Verma v State of Uttarakhand* (2020), the Supreme Court said that not every insult to an SC/ST person attracts the provision: the insult or intimidation must be connected to the victim belonging to the protected community. More recently, in *Gunjan @ Girija Kumari v State* (NCT of Delhi) (2026), the Supreme Court reiterated that “public view” is an essential requirement for the offence.

What would establish untouchability?

If evidence were to show that the venue was regarded as requiring cleansing because caste-based notions of pollution were attached to Mr. Kharge’s touch or presence, the reasoning in *Sukanya Shantha* case and the caste-specific purification considered in *Surya Narayan Choudhary* case would become directly relevant. If, on the other hand, the ritual was undertaken for reasons unconnected with caste, including the reasons cited by the organisers, its timing after Mr. Kharge’s rally would not by itself establish untouchability.

The word *shuddhikaran* cannot answer that question. The legal issue is the connection, if any, between the ritual and caste-based notions of pollution. (*Sahil Hussain Choudhury is an advocate and Constitutional law researcher from Assam*)

THE GIST

Article 17 abolishes untouchability in all forms, while the Protection of Civil Rights Act, 1955 penalises its practice, including insults based on untouchability.

The Supreme Court has linked untouchability to caste-based notions of ‘purity and pollution’, holding that Article 17 can address different forms of discriminatory treatment based on a person’s touch or presence.

Whether the Haldwani ritual amounts to untouchability would depend on evidence of a caste-based connection; the word ‘*shuddhikaran*’ or the ritual’s timing alone would not establish it.

What does Thailand’s new amnesty Act cover?

Who would benefit from the new Act? What are the shortcomings of the amnesty push?

Vighnesh P. Venkitesh

The story so far:

Thailand’s Peaceful Society Promotion Act, an amnesty initiative passed by lawmakers in July, came into effect on August 24, as the government under Prime Minister Anutin Charnvirakul seeks reconciliation with a large share of the population still leaning towards populist former leader Thaksin Shinawatra, a key figure at the centre of the country’s political turmoil.

What are the provisions of the new Act?

The Act seeks to grant amnesty to those convicted over protests or for “expressions motivated by political conflicts” from January 1, 2005, to July 16, 2025, except for offences involving corruption, lese majeste violations,

murder or causing serious injuries, and those against private entities on a case-by-case basis.

The Act has listed more than 40 categories of offences eligible for amnesty, including severe charges such as sedition, rebellion, cybercrimes and emergency violations.

The Act calls for the setting up of a committee, the “peaceful society promotion committee”, led by the Prime Minister or his deputy within a month to determine who qualifies for amnesty. The panel will have representatives from Parliament, human rights experts, and civil society organisation members.

In addition to granting release for current prisoners, the committee can also close investigations and prosecutions, dismiss pending court cases, and clear criminal records of those eligible for the amnesty. Government officials have said that the panel will review all political

cases recorded between 2005 and 2025 under the Act.

Who would benefit from the new Act?

The Thai Lawyers for Human Rights says that more than 5,000 individuals have been prosecuted for political conflicts since the 2006 coup, with a third of these happening after 2020, with around 300 of those involved being under the age of 18.

It said that, as of July this year, around 54 people remained in prison over political activities, but only around 10 of them would be eligible for amnesty since the others have Article 112 charges against them.

Other than those in prison, the Act would also clear the records of thousands with charges. This includes members of pro-Shinawatra bodies and anti-monarchy outfits as well as the royalists who took part in the ‘yellow shirt’ protests in 2006 that led to the coup and subsequent

ouster of Mr. Shinawatra and years of instability.

The current Bhumjaithai Party-led government, which came to power after a snap election following a short term as a minority government, is on thin ice, having to manage strong voices from multiple political alignments in the country, and the sweeping amnesty provisions, which can be interpreted for the pro-democracy outfits as well as the royalists simultaneously, is a strategic move to secure support.

What are the shortcomings of the amnesty push?

While the new Act will erase politically motivated criminal records for thousands of people, several organisations have questioned the exclusion of lese majeste provisions from its ambit. The draconian Article 112, critics say, has been used to silence dissent by governments, including the royalists and the populists, with even juveniles being charged and awaiting trial for defaming the King and senior officials of the royalty.

While the Act has listed sedition and rebellion as charges eligible for amnesty consideration, Section 112 remained non-negotiable during lawmakers’ deliberation. A minority faction of independent Senators had moved during the drafting period of the legislation to introduce a clause to grant amnesty for

Section 112 convicts under 18 years of age at the time of the offense, but this was set aside in a 126 to 15 vote.

Critics say that the new Act also has a provision explicitly stipulating that even the existing special rehabilitation and judicial diversion plans for minors cannot be applied to any youth facing a Section 112 charge. This ensures that the law serves as a “blunt instrument of absolute exclusion, stripping young pro-democracy activists of the legal protections normally afforded to children under both domestic and international human rights frameworks”, 112watch, a Thai organisation, said.

The legislation shows that political reconciliation in Thailand is “selective, conditional, and reserved only for favoured factions”, the organisation said in a statement condemning its clearance. “Excluding Article 112 – a provision historically used as a political weapon to suppress dissent – does not foster national harmony; it deepens societal wounds and institutionalises state impunity”, it said.

The group has also flagged the insertion of offences related to election fraud into the scope of amnesty under the Act, which could potentially clear individuals involved in collusion during senatorial elections, which is not related to the political expression that the government seeks to look beyond.

CACHE

India’s data centre boom is colliding with its climate reality

India’s data centre expansion is attracting billions in investment, but rising electricity and water demand, transmission bottlenecks, heat generation are straining already stressed resources; a national framework with enforceable standards is needed to manage these costs and protect consumers

Soumya Sarkar

India is in the middle of a data centre gold rush. Global tech giants – Google, Meta, Amazon, Microsoft – have committed billions to build facilities across the country. The government estimates that data centres will drive nearly \$200 billion in investment over the coming decade.

Many States in the country are competing fiercely for a piece of the pie. Maharashtra wants to be the data centre capital of the country. Telangana has declared data centres as “essential services.” Karnataka is reviewing its policy to attract more. Rajasthan is offering tax exemptions and cheap land. All eyes are on the opportunity, but none on the cost.

Data centre capacity in India has nearly tripled from 520 megawatts in 2020 to nearly 1.5 gigawatts today. By 2030, it is projected to hit 6.5 GW, which is a fourfold expansion in just four years. Electricity demand from these facilities is expected to rise from about 13 terawatt-hours (TWh) in 2024 to roughly 57 TWh by 2030. The Union Ministry of Power estimates that artificial intelligence alone will add 26.3 gigawatts of new demand by 2031-32.

No policy document, at the Central or State level, has assessed what guaranteed power costs the grid that is already strained under 45°C heat, or where the water will come from for cooling, or what the thermal load from thousands of servers will do to regions already teetering on dangerously high temperatures.

The resource reality

A 100 MW data centre consumes about 2 million litres of water daily. That is equivalent to the daily use of roughly 6,500 households. India’s data centres consumed an estimated 150 billion litres of water in 2024-25. By 2030, that figure is projected to more than double to 358 billion litres annually.

The water use matters because data centres are clustering in India’s most water-stressed regions. Rajasthan extracts 147.11% of its annual groundwater recharge, the second highest rate in the country. Several groundwater assessment units in Maharashtra are classified as semi-critical. Telangana’s Irrigation Minister confirmed in May 2026 that 16 districts were under groundwater stress. Hyderabad’s surface water supply dropped 20% during the summer of 2024 due to poor monsoon recharge, forcing the water board to ration supply. Mumbai’s reservoirs stood at just 44.5% of capacity in March 2026.

The water these facilities consume is not accounted for in any State policy. None of the policies require public disclosure of daily water consumption. None require a hydrogeological assessment before approval. None mandate that water sourcing must not compete with agriculture or municipal supply.

The electricity situation is equally concerning. India’s power grid is already straining under record demand. Maharashtra’s peak power demand hit 27,230 MW in April 2026, the highest ever handled by the State utility. Two-year waits for 220 kV grid interconnections across the country are already lengthening project timelines.

Transmission constraints are also



GETTY IMAGES

becoming a critical bottleneck. India curtailed 300 GW-hours of renewable energy in the first quarter of 2026 alone, simply because the grid could not carry it, according to an analysis of Central Electricity Authority data by Ember Energy, a specialised consultancy. Over the past five years, India has met only about 80% of its annual transmission targets. One in four major transmission schemes is running a year or more behind schedule. As a result, 20 GW of renewable energy capacity faces connectivity delays of more than four months.

Rajasthan and Gujarat, which house the bulk of India’s utility-scale solar and wind, face the longest queues at pooling stations. The problem has become structural in the country. Solar projects are being built faster than the wires to carry their power. This matters because data centres need reliable, uninterrupted electricity. If renewable energy cannot reach them, the power will come from coal, adding to the burden of carbon emissions that India is trying to curtail.

The heat they generate

Data centres do not just consume power and water. They also generate heat. And that heat makes the places around them hotter. A March 2026 study from the University of Cambridge, analysing 20 years of NASA satellite data, found that data centres raise land surface temperatures by an average of 2°C within a 10 km radius, with extreme cases reaching 9.1°C. The study estimates that approximately 340 million people globally live within these affected zones.

This is not a distant problem. Mumbai’s land surface temperature has already risen from 40.9°C in 2003 to 47.3°C in 2023, an increase driven largely by urbanisation and heat-trapping infrastructure. Hyderabad’s urban heat island intensity ranges from 5.74°C to

6.82°C, even as its urban area doubled between 2001 and 2020. The city recorded temperatures above 43°C in the summer of 2024.

The Cambridge finding creates a feedback loop. Data centres generate heat. That heat raises ambient temperatures. Higher ambient temperatures increase cooling demand. Increased cooling demand raises electricity consumption. Higher electricity consumption, unless fully renewable, increases emissions. And those emissions contribute to the very climate change that is making India hotter in the first place.

The governance gap

The data centre policies of various States offer generous incentives in the form of electricity duty exemptions, transmission charge waivers, stamp duty relief, and fast-track clearances. But they impose virtually no conditions. None of the major State policies require a grid impact assessment before commissioning. None require mandatory renewable energy sourcing. None require thermal load assessment for surrounding communities.

Telangana’s policy is particularly revealing. It classifies data centres as “essential services,” guaranteeing them uninterrupted power even during shortages. In a State where 16 districts face groundwater stress and temperatures have reached 47°C, this is a policy choice with direct consequences.

Maharashtra’s policy originally required 100% renewable energy for core operations. In June 2026, the State reduced that requirement to 51%, a dilution framed as improving project viability.

Gujarat’s new Data Centre Policy 2026-29 mandates at least 51% green energy sourcing. Karnataka’s IT minister told the State Assembly in March 2026

that the State was reviewing its policy over water and energy concerns. Tamil Nadu has linked incentives to renewable compliance. But these are exceptions, not the norm. And even where mandates exist, enforcement and verification remain weak.

“There is a risk that a significant part of the associated infrastructure cost could eventually be socialised,” said Vibhuti Garg, Director, South Asia at the Institute for Energy Economics and Financial Analysis (IEEFA), a think tank. “Where broader grid infrastructure is required, government support or appropriate financing mechanisms could help ensure that the cost is not simply transferred to consumers through higher electricity tariffs.”

“Governments should introduce phased power and water use standards with enforceable benchmarks,” said Prateek Aggarwal, Senior Programme Lead at Council on Energy, Environment and Water, a Delhi-based think tank. “A national AI Energy Star rating would let buyers and regulators compare how energy-efficient a facility or model actually is.”

What needs to change

India’s generation pipeline can absorb the additional demand from data centres. The Union Ministry of Power says capacity is not the constraint. The constraint is market design and transmission infrastructure.

Aggarwal argued that “India needs climate-intelligent power markets that price grid services separately, where short-term markets pay for ramping, storage, and demand response.” Ember’s analysis points to another near-term solution in the form of battery storage at renewable pooling stations. Roughly 3-4 GW of two-hour storage could have absorbed most of the curtailed generation in early 2026, according to its calculations. The technical pieces are in place but the gap is regulatory and commercial.

IEEFA has suggested that coastal locations offer advantages such as proximity to near-shore wind and solar, and access to seawater for cooling without desalination. But for now, most data centres are clustering around existing tech hubs of Mumbai, Hyderabad, Bengaluru, and the National Capital Region. These are precisely the places where water and grid stress are already most acute.

A national sustainability framework would help. It would establish minimum standards for renewable energy sourcing, water consumption disclosure, grid impact assessment, and thermal load evaluation. It would create a common set of expectations for investors and a common set of protections for consumers. It would also recognise that environmental constraints are economic constraints, and that ignoring them only creates larger costs later.

Data centres are not optional. They are critical infrastructure for India’s digital future. The question is not whether India should build them. The data centres will be built. It remains to be seen whether they will be built in a way that protects India’s water, power grid and climate, or in a way that leaves future generations to pay the bill. (Soumya Sarkar is an independent journalist based in New Delhi and Kolkata)



FROM THE ARCHIVES

Know your English

S. Upendran

What is the difference between “resume” and “biodata”? (Mootha Sarva Rayudu, Kakinada)

It is difficult to point out the difference between the two. In the Indian context, I guess one could say that there is no difference between them. A “bio-data” is a resume. A native speaker, on the other hand, may not understand what you mean by “bio-data”. The word does not exist in most native varieties of English. The words commonly used by native speakers are CV (curriculum vitae) and resume. In India, however, the word ‘bio-data’ is much more common than the other two.

Is ‘juggernaut’ derived from Lord Jagannath? (S. Bakthavathsalan, Gurgaon, Haryana)

Yes, Lord Jagannath of Puri has given us the word “juggernaut”. As you probably know, Lord Jagannath and his consort are usually placed on huge chariots and taken out in procession every year. Lots of people from various parts of the country come to see and participate in this event. Many people line up as volunteers to pull the heavy chariot. Whenever you have a huge crowd, accidents are very commonplace; they are just waiting to happen. There have been several reported cases of people accidentally falling and being crushed by the huge wheels of Lord Jagannath’s chariot. A person who was a witness to such accidents was a Franciscan missionary named Friar Odoric. He visited India in the 14th Century and wrote about his visit to Puri in a journal, which he published in Europe later on. In his journal, Odoric wrote in detail about the huge chariot of Jagannath and how the devotees threw themselves at the chariot wheels, allowing themselves to be crushed. According to Odoric, the people were offering themselves as a sacrifice to the Lord! The European readers were shocked and horrified when they read this, and began to associate the word “juggernaut” with a huge object that is out of control. The Friar’s story of the human sacrifice spread throughout Europe and by the 19th Century “juggernaut” began to be associated with a massive object that destroyed everything in its path. It was seen as a destructive force. It is interesting to note that “trains”, “tanks”, and even “automobiles”, when they were first introduced, were referred to as “juggernauts”! The word has a negative connotation in English. Here are a few examples.

Sandeep is very naive. He thinks it is possible to compete with the juggernauts of the industry.

Believe it or not, the skinny man standing over there is a political juggernaut.

What is the meaning of “cut off one’s nose to spite one face”? (Pranjal Kishore Sharmah, Jorhat, Assam)

This is one of those expressions that has been around for quite some time. If you wanted to get even with someone, or hurt the feelings of that person, would you do it by cutting off your nose? Would that be a sensible thing to do? It wouldn’t, would it? That’s what the expression ‘cut off one’s nose to spite one’s face’ means. It means harming oneself, perhaps much more than the person one is trying to hurt.

Harish loves to play tennis, but he refused to play with Suresh because he doesn’t like him. He was cutting off his nose to spite his face.”
Published in The Hindu on October 30, 2001

Word of the day

Lacuna:

a blank gap or missing part

Synonyms: shortage, lack, deficiency, paucity, absence, scarcity

Usage: *There is a lacuna in the report that needs to be addressed.*

Pronunciation: newsth.live/lacuna

International Phonetic Alphabet: /ləkjuːnə/

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

THE DAILY QUIZ

On September 2, 1946, an interim government headed by Jawaharlal Nehru began functioning as British India took its first major step towards the transfer of power

Prathmesh Kher

QUESTION 1

Which British constitutional initiative provided the framework for the formation of the interim government?

QUESTION 2

Who served as Commander-in-Chief of India while the interim government was in operation?

QUESTION 3

On what date did the Muslim League join the interim government?

QUESTION 4

Through what electoral mechanism were members of the Constituent Assembly, from which the interim government was formed, chosen?

QUESTION 5

On what date did the interim government cease to exist, and what major constitutional event brought its tenure to an end?



Visual Question:

Identify these members of the interim government from left to right. SELECTED WORKS OF JAWAHARLAL NEHRU, SECOND SERIES, VOL. 1, PP. 160–161

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

1. Who was the first Indian to win the Magsaysay Award as early as 1958? **Ans: Vinoba Bhave**
2. Who won the award in 1965 for public service? What was the title that he was known by? **Ans: Jayaprakash Narayan; Lok Nayak**
3. Name the Indian who won the award in 1974. Name the last and most prominent film featuring her? **Ans: M.S. Subbulakshmi. Meera**
4. Another award winner in 2005, this person was born into a family that had two distinguished Nobel laureates. She served as a

leading doctor and director of the Cancer Institute in Chennai. **Ans: V. Shanta**
5. A former IAS officer, this awardee led major campaigns, the most prominent of which was the National Campaign for the People’s Right to Information, which culminated in the Right to Information Act being passed. **Ans: Aruna Roy**
Visual: Identify this awardee. Cited for “guiding the people of [Andhra Pradesh] to end the scourge of child labour and send all of their children to school”. **Ans: Shantha Sinha**
Early Birds: Siddhartha Viswanathan | Piyaali Tuli | Tamal Biswas | Sunil Madhavan | Lalchand Bhutani

Take Bishkek to BRICS

PRIME MINISTER Narendra Modi's address at the 26th summit of the Shanghai Cooperation Organisation in Bishkek, Kyrgyzstan, comes at a time when Central Asia is diversifying its partnerships in all directions. A region long shaped by its Soviet past and one that still maintains economic links with Russia, its five countries are now also looking to China for trade, investment and infrastructure, and to Iran and the Gulf for access to the south, though the ongoing conflict complicates the latter. The region's growing strategic importance and shared security concerns, including terrorism, have led India and all Central Asian countries except Turkmenistan, which maintains permanent neutrality, to establish strategic partnerships. This evolving context makes the PM's visit even more significant. The PM's speech focused mainly on two issues: Connectivity and terrorism. The absence of direct land access has constrained trade and wider economic and cultural engagement. There is no overland access through Pakistan, and Afghanistan's airspace remains beset by security risks. But connectivity goes far beyond building roads and railways. At its core, it is about shaping the economic and strategic geography of Eurasia. India, therefore, must find ways to expand economic engagement while overcoming the limitations imposed by geography. A starting point could be to focus on products and services that do not depend on roads — services, digital systems and technological investments. On terrorism, the Prime Minister is right to call on the international community to collectively dismantle the ecosystem of terror, including its financing and recruitment networks. The reality New Delhi must recognise, however, is that the international political will against terrorism has weakened. Over the past year, Pakistan has largely overcome its diplomatic isolation, and it is set to assume the organisation's rotational chairmanship. In June last year, SCO defence ministers could not agree on the references to terrorism in their joint statement. China possesses greater financial resources than any other member and is heavily investing in Central Asian infrastructure as part of the Belt and Road Initiative. Delhi should therefore place greater weight on its individual partnerships with member states.

The agreement with Uzbekistan on the long-term supply of uranium is a step in that direction. Central Asian countries are emerging as multi-vector actors. Rather than choosing between competing powers, they are seeking multiple options to improve access to market. India should become one of those options — and use a multilateral forum like the SCO to advance bilateral relationships. That is a strategy New Delhi should carry forward to BRICS, as it prepares to host its 18th summit.

Real Creator IAS Edition https://t.me/+2RvD_RGf9mjMzg1

Red label for salt, sugar and fat is a good start

AMID RAPIDLY expanding concerns about Indians' growing consumption of food high in sugar, refined carbohydrates, salt and unhealthy fats comes the FSSAI proposal to implement front-of-pack warnings in the form of red, hexagonal labels on package food. Sweetened beverages will carry a separate warning. The proposal comes weeks after the Supreme Court pulled up the apex food regulator for failing to move on warning labels. It is a welcome step towards addressing alarming levels of obesity, particularly among children — India now ranks second globally, after China, for the number of children who are overweight or living with obesity.

Given that eating behaviour is complex and influenced by a number of factors, including gender, economic wherewithal, awareness and faith-based restrictions, there has been scepticism about the effectiveness of food warnings. But there is also evidence that such interventions can change consumption patterns. For example, Chile witnessed a 24 per cent drop in sugary drink consumption after it introduced black octagonal warning labels on packages in 2016. Clarity and legibility are key; a previous FSSAI proposal to use a health star rating system was criticised as such stars are usually perceived as positive and warning labels bearing them have been associated with increased consumption of unhealthy foods.

The notification and timeline for implementation are still awaited. Experts have warned that the two-or-more-unhealthy ingredients threshold in the first of the intended two-phase implementation could leave out products that are high in just one unhealthy ingredient. There are concerns that the proposed font size may be too small to be effective. Warning labels, finally, can only be one part of a larger approach. Addressing the obesity epidemic — which exists alongside malnutrition — will require a broader public-health response that includes raising nutritional awareness, stronger regulation of junk food and nudges towards healthier lifestyles. A red label on a packet may not, by itself, make people eat better, but it is a useful place to start if it makes it easier to tell healthy choices from harmful ones.

Football, before and after Messi

INTERNATIONAL FOOTBALL has lost its grandest experience, which was watching Lionel Messi. Time, grief and wear and tear took their inescapable toll on the Argentine, who announced his retirement on Monday through a post on Instagram. There is a sense of loss and mourning, because no one player has had such a vast impact on a major sport's footprint as Messi. He scored goals, hatched assists, won trophies and honours, conquered glory and immortality. But most poignantly, he embodied the beauty in the beautiful game.

In 21 years at the pinnacle of the sport, he saw the game transform from the preserve of artistes to that shaped by athletes, the game getting brutally physical, the movements predetermined in the board-room. But Messi remained as he was when he first burst through — a shapeshifting genius immune to the changes around him. Roles, positions, and hairdos changed, but the magnificence of Messi's game remained untarnished. He came closest to the sport's ideal as anyone ever has. His genius was simple and uncomplicated, football with a frictionless lightness, a complicated game made to look ridiculously simple, a task of merely finding angles and spaces, precision and perfection, of brush-stroking the ball with a swish of his left foot to the back of the net.

Whether he is the greatest of all time is a meaningless debate. Only Messi could measure Messi or gauge the true depth of his gifts. The two men who could have arguably judged his greatness are dead, Pele and Diego Maradona. The scale of measurable achievements would not capture the scale of immeasurable experience that was watching Messi. International football, after Messi's departure, will be a less pleasurable feast.

INDIA'S GDP growth of 7.8 per cent in the first quarter once again exceeded expectations, continuing a pattern seen over the past several quarters. Growth surpassed both the median forecast of 6.8 per cent by professional forecasters and the RBI's revised projection of 7 per cent. The outperformance underscores the strength of India's domestic drivers and its ability to navigate an increasingly uncertain global environment.

Even amid continuing conflict in West Asia and weather-related uncertainties, high-frequency indicators had signalled strong momentum. Robust industrial activity, healthy consumption and strong goods exports, alongside accelerating government investment, were the key drivers of growth in the first quarter of this fiscal.

The residual impact of policy measures introduced last fiscal year, coupled with continued support through direct benefit transfers, also bolstered growth. Such programmes have expanded steadily, with 17 states now providing cash transfers, primarily to women. The impact of GST rate cuts was particularly visible in automobiles. Dealer discounts and higher disposable incomes resulting from income-tax relief provided additional support. According to data from the SIAM, sales of passenger vehicles, commercial vehicles and two-wheelers rose 26 per cent, 20.3 per cent and 18.3 per cent respectively in the first quarter.

Retail credit growth remained robust with other personal loans, a proxy for short-term consumption, growing at 14.2 per cent. Also, households were cushioned against the sharp rise in crude prices with government

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and oil companies absorbing most of it, particularly in the initial phase of conflict.

That said, as 2026-27 progresses, the growth-inflation mix is likely to become less favourable, with growth moderating and inflation rising. Crisil expects GDP growth of 7 per cent and inflation of 5.1 per cent.

The moderation in growth reflects a more challenging external environment, marked by disruptions from the conflict in West Asia, unresolved tariff issues with the US, weather-related risks and a strong base effect in the second half. The two exogenous factors that worked in India's favour last year, low crude oil prices and a normal monsoon, are unlikely to provide similar support this year.

Meanwhile, the conflict in West Asia has disrupted supply chains, increased insurance, freight and input costs, and is likely to weigh on both global and domestic growth.

Weather-related risks warrant close monitoring as El Niño conditions in the equatorial Pacific intensify. Over the past 25 years, five of the six El Niño years have resulted in below-normal rainfall. This year, cumulative rainfall was 14 per cent below the long-period average (LPA) at the end of August. While rainfall in July was 1 per cent above the LPA, August recorded a deficit of 16 per cent. The IMD has signalled below-normal rainfall in September.

There are, however, some mitigating factors. India's net irrigated area has risen by 10 percentage points to 59 per cent over the past decade, improving resilience to rainfall shocks. The country also holds ample rice and



DHARMAKIRTI JOSHI

As 2026-27 progresses, the growth-inflation mix is likely to become less favourable, with growth moderating and inflation rising. Crisil expects GDP growth of 7 per cent and inflation of 5.1 per cent

A master plan for Delhi with ecology & heritage at its centre



TARANJIT SINGH SANDHU

GREAT CITIES are defined not only by the infrastructure they build, but by what they preserve, restore, and pass on to future generations. Delhi is uniquely endowed in both respects. The Yamuna and its floodplains, the Ridge, urban forests, biodiversity parks and neighbourhood greens form the city's ecological foundation.

As India advances towards the Prime Minister's vision of Viksit Bharat 2047, Delhi must demonstrate how a growing metropolis can combine development with environmental restoration and heritage conservation. The Master Plan for Delhi 2047 (MPD-2047) provides an opportunity to place these principles at the heart of the Capital's future.

Climate change has fundamentally rewritten the rules of urban planning. Rising temperatures, extreme rainfall, acute water stress, deteriorating air quality and biodiversity loss directly affect the quality of life.

MPD-2047 envisages an interconnected Green-Blue network that integrates the Yamuna, the Ridge, forests, biodiversity parks, water bodies, drains, neighbourhood parks, and open spaces into a unified ecological system.

For centuries, the Yamuna has shaped Delhi's geography, history, and civilisation. Now, rapid urbanisation has placed unprecedented stress on its ecosystem and floodplains. MPD-2047 places the river at the centre of Delhi's ecological regeneration. Nearly 1,700 hectares of the Yamuna floodplains are proposed to be protected, conserved and ecologically restored.

To tackle pollution at its source, the strategy focuses on intercepting and treating drains flowing into the river through upgraded sewage treatment infrastructure, constructed wetlands, and bioremediation. Together, these measures will restore the river's ecological health and natural floodplain functions.

The larger objective, however, goes beyond environmental restoration. Delhi must also rebuild its relationship with the river. A proposed 52-kilometre cycling corridor, alongside walking trails, public greens, and managed recreational spaces, will reconnect citizens with the waterfront.

Complementing the Yamuna is Delhi's other major ecological pillar — the Delhi Ridge, an extension of the ancient Aravalli range. MPD-2047 plans the ecological restoration of approximately 7,784 hectares of the Ridge, prioritising native species and scientific ecosystem management.

Urban forests, biodiversity parks and ecological corridors will complement this network. When connected with parks, water bodies and other open spaces, they can create a citywide ecological framework supporting cleaner air, cooler neighbourhoods and healthier communities.

Few cities possess a historical legacy as rich and diverse as Delhi. Its forts, monuments, stepwells, archaeological remains, historical neighbourhoods and architectural precincts tell the story of the many eras that have shaped the city.

MPD-2047 envisages bringing around 1,500 heritage assets under Cultural Resource Management Plans, creating a systematic framework for their long-term protection and sensitive management. This will help move heritage conservation from an isolated effort towards a more structured and integrated approach.

A key part of this approach is adaptive reuse. Heritage buildings can be sensitively adapted for museums, libraries, hotels, offices and cultural activities.

The plan also seeks to make conservation more practical and economically viable through planning and financial incentives, including transferable development rights (TDR), façade retention and appropriate relaxation of space standards by the competent authority, while ensuring necessary fire and life-safety requirements. The objective is to ensure that conservation is not seen as a burden, but as an opportunity to preserve Delhi's identity while giving heritage properties a sustainable future.

MPD-2047 proposes heritage, cultural and festival circuits connecting monuments, historic precincts and public spaces. These can encourage visitors to experience Delhi not simply as a collection of individual monuments, but as a living historical landscape.

The aim is also to create heritage precincts that remain active beyond conventional visiting hours.

In this way, heritage conservation can become a powerful instrument of urban regeneration, tourism, employment and local economic development, while preserving the character that makes Delhi unique.

As India moves toward Viksit Bharat 2047, Delhi must prove that development and conservation are complementary, not conflicting. A Viksit Dilli must do more than grow. It must breathe better, live healthier, and honour the heritage that gives it a soul.

The writer is Lieutenant Governor, Delhi

wheat stocks, which should help contain food price pressures.

Agriculture itself is becoming more resilient as non-crop activities gain a larger share. While crop gross value added contracted by an average 0.5 per cent annually in the five years to 2023-24, non-crop agriculture, which now accounts for nearly 40 per cent of agricultural gross value added, expanded 6.5 per cent annually. Nor is the relationship between monsoons and inflation straightforward. Historical evidence suggests deficient monsoons do not always lead to higher food inflation. Foodgrain stocks, currently more than twice buffer norms, provide an additional cushion against price spikes.

Even so, these improvements do not fully insulate agriculture or the broader economy. Several crops without buffer stocks, as well as perishable vegetables, remain vulnerable to adverse weather. Weak monsoons can also hurt rabi production by reducing soil moisture and lowering reservoir levels. Agricultural output and food inflation therefore remain key variables to watch.

Although headline inflation eased in July and core inflation remained benign, upside risks persist. Our base case assumes Brent crude prices averaging \$82-87 per barrel this fiscal. The unresolved conflict in West Asia continues to keep oil prices volatile. Higher crude prices typically translate into slower growth, higher inflation and a wider current account deficit.

Core inflation, often viewed as a gauge of underlying demand pressures, also appears decep-

tively low. Strong demand conditions, rising fuel costs and other input pressures, reflected in near-double-digit wholesale price inflation, are gradually being passed through to consumers.

The automobile sector illustrates this well. Vehicle prices are likely to rise as manufacturers pass on higher costs to protect margins, while dealer discounts are gradually withdrawn. Combined with a high base effect, this should moderate automobile growth in the second half.

Unlike last year, the balance of risks now points towards possible interest rate hikes. Persistent inflationary pressures, coupled with an unresolved conflict in West Asia and weather-related risks, could bring monetary tightening back into consideration.

Despite the expected moderation in growth, India's macroeconomic buffers remain strong. Foreign exchange reserves cover more than nine months of imports, while corporate and banking-sector balance sheets are in robust health. The economy remains resilient, but the road ahead is likely to be less forgiving than last year. The challenge will be to sustain high growth in an increasingly uncertain global environment.

For now, tax relief and public investment continue to support activity. The Pay Commission's recommendations should provide an additional boost to consumption when implemented. Beyond cyclical tailwinds, sustained progress on structural reforms that enhance competitiveness will be critical to maintaining the growth momentum.

Joshi is chief economist, Crisil Ltd

Solution for stubble burning lies close to the farm



SHWETA SAINI

IN A few weeks, Delhi will again begin watching Punjab's farm fires. Governments will announce measures and farmers will again be asked not to burn paddy straw. But the economics facing farmers has changed little over the years: Bulky residue, a narrow window before wheat sowing, and a cost attached to almost every alternative to burning.

What has changed, however, is the value of parali itself. When we began working on crop residues, farmers in several locations were still paying to have straw removed. Today, in parts of Punjab, the same straw can fetch around Rs 1.5-2 per kg. Demand from power plants, CBG units and pellet manufacturers is slowly creating a market for what was until recently treated as waste.

This raises another question: If parali now has value, where should that value be created, and how much can remain with the farmer? Biochar offers one possibility. It is a carbon-rich material produced by heating biomass under limited oxygen, and can be made from crop residues such as paddy, maize, cotton and mustard stalks. Roughly 100 kg of dry parali can yield around 30 kg of char. Applied to soil, it can improve water retention and nutrient-use efficiency, while locking carbon away for a century.

This differs from using biomass only as fuel. Burning recovers energy but returns much of its carbon to the atmosphere. Biochar applied to soil can retain a significant share while also serving an agronomic purpose. For Punjab, this matters. Its rice-wheat system is under stress from declining soil quality, intensive fertiliser use, and groundwater depletion. Residue generated by the same system could improve its soils. The problem is where processing happens. Parali has to be collected, baled, stored and transported within the narrow window before wheat sowing. Long-distance transport of a bulky, relatively low-value material quickly eats into its economics. The farmer supplies raw material, while much value-addition happens after biomass leaves the village.

With biochar, the irony is greater. A farmer may supply the straw, see it processed elsewhere and later buy back a product made from biomass originating on farms like his. Why not, then, move the technology closer to the straw? India already understands decentralised rural processing. Wheat does not travel 100 km merely because flour requires machinery. The village chakki places processing close to where the commodity is produced and consumed. Paddy residue may need a similar rethink.

We have been developing a village-scale biochar system around a build-operate-transfer model. A technology provider initially installs and operates the unit, trains local operators and ensures quality and emission standards. Over time, the asset and capability can transfer to an FPO, SHG, or cooperative.

The government does not need to run thousands of such units. It can provide standards, training, concessional finance and initial support. Panchayats can help with land and coordination. Farmers could bring straw to a nearby processing point much as they bring wheat to a flour mill. Some biochar could return to their fields; the rest could be sold where markets exist. This changes the economics. Raw straw travels less, value addition happens closer to the farmer, and villages are not left with subsidised machinery nobody knows how to operate. It also changes the incentive to burn. Burning remains quick and cheap where alternatives involve cost, labour and uncertainty. Enforcement and machinery subsidies can help, but behaviour is likely to change when residue itself becomes valuable. As biomass markets develop, the question should be: Where should value from parali be created, and who should capture it? The answer may lie closer to the farm.

Saini is CEO, Arcus Policy Research. Sood is chairperson, Arcus Serves Foundation

40 YEARS AGO
September 2, 1986

NAM proposes sanctions

THE EIGHTH non-aligned summit began in Harare with a fervent appeal by top leaders for efforts to end the apartheid policies in South Africa. Similar action was suggested towards achieving a just international economic order and nuclear disarmament.



Bid to blow up bus in Delhi

TWO SUSPECTED terrorists tried to blow up a DTC bus in the Capital, leaving an explosive device in a briefcase on the bus near Kauria Bridge. Passengers noticed the briefcase just as the bus was about to start. Police and experts of the bomb squad rushed to the spot. The experts defused the device.

77 die in US plane collision

AN AEROMEXICO DC-9 airliner and a private

plane collided and crashed in balls of fire into houses in Los Angeles, killing at least 77 people. Teams of disaster workers spread out over a blackened square mile of houses and tree-lined streets, strewn with shoes, clothing and toys scattered by the airliner.

Judge among three shot

R P Gaiid, additional district and sessions judge, Jalandhar, and two others were gunned down by terrorists in the past 24 hours in Punjab.



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China, US are in race to connect science with industry. India must catch up



RAJA MANDALA
BY C RAJA MOHAN

BEHIND THE riot of robots running, dancing and playing at Beijing’s second World Humanoid Games last week is an ambitious Chinese project to turn China into the world’s leading science power. This ambition is rooted in President Xi Jinping’s call to fully mobilise “new quality productive forces” being unleashed by the current revolutions in science and technology. Xi is convinced that China’s next phase of growth cannot rely on cheap labour, large-scale manufacturing, infrastructure and capital accumulation. It must come from innovation.

AI is central to Xi’s strategy. Beijing’s objective is to diffuse AI across the physical economy — robotics, machine tools, automobiles, biotechnology, materials, energy, agriculture and scientific research. China’s manufacturing depth is its advantage. Beijing is betting that fusing digital intelligence with the world’s largest industrial ecosystem will make China the leading technological power.

For decades, China absorbed foreign technology, improved it through manufacturing and dominated production. It now wants to move upstream — from adaptation to original discovery. China spent 2.8 per cent of GDP on R&D in 2025; basic-research expenditure rose by 11 per cent. The manufacturing power now seeks to become a science superpower.

The logic is simple: AI accelerates discovery; discovery produces technology; technology transforms industry; industrial strength generates national power and gives China a geopolitical edge.

Washington is reaching a similar conclusion, coming from the opposite direction. The Trump administration’s Science: A New Golden Age, released in July, has been billed as the first major reset in US science policy since World War II. It begins by recognising Real Creator IAS Edition <https://whatsapp.com/channel/0029Vn2VRb6RGJOKH6oBd0F>

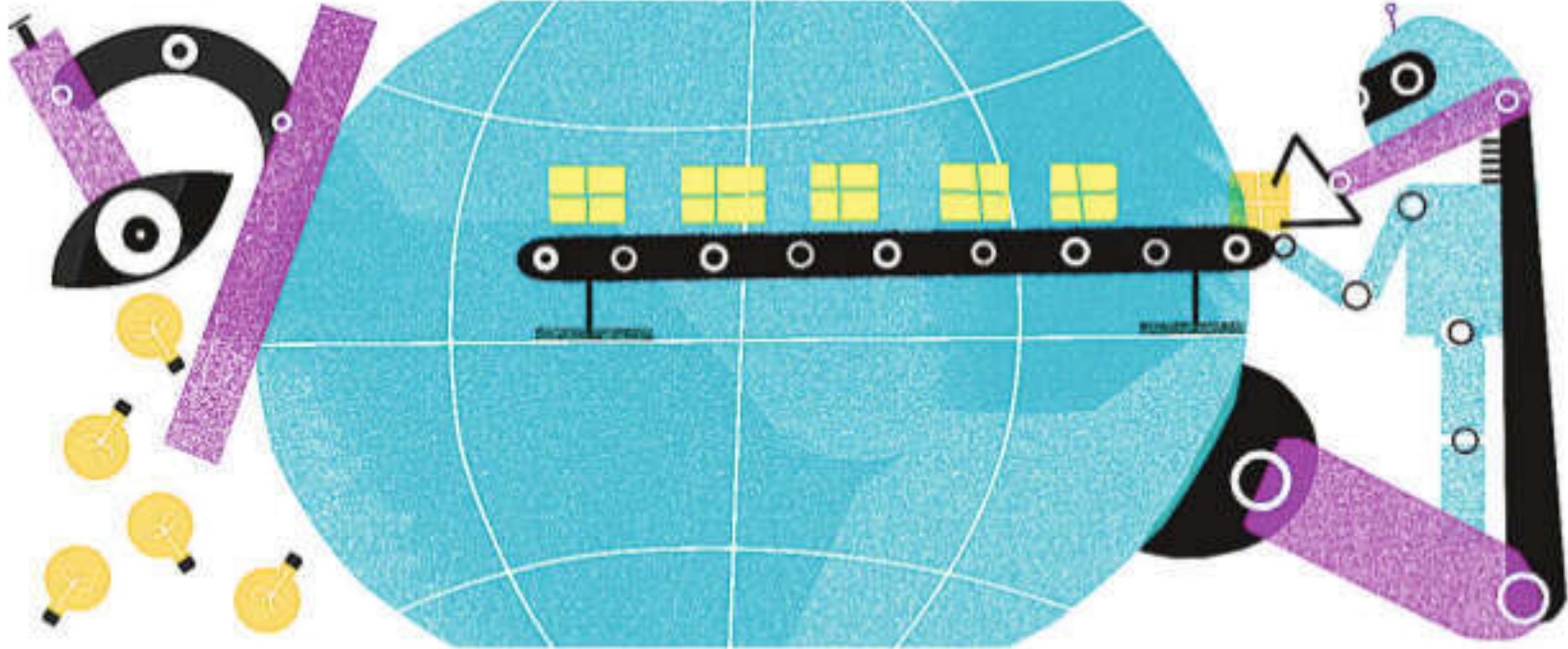


ILLUSTRATION: C R SASIKUMAR

American strengths — its great universities, laboratories, technology companies and capital markets. It also acknowledges the American weakness — the erosion of the capacity to turn discoveries into production.

Globalisation separated American innovation from manufacturing. Companies designed at home, produced abroad and depended on long supply chains. That model generated wealth but also vulnerabilities exposed by the pandemic, China’s rise and geopolitical rivalry. Washington now wants to reintegrate the production of knowledge and manufacturing.

Washington and Beijing see AI not merely as a general-purpose technology, but as an accelerator central to the production of new knowledge that in turn will transform industry. By making discovery continuous with design and manufacturing, AI-driven science will transform production itself — and turn scientific speed into economic power and geopolitical capability.

China begins with the largest manufacturing base and moves upstream into science. America begins with the strongest scientific system and moves downstream into manufacturing. China fears dependence on American technology; the US fears dependence on Chinese production. Both seek to close the gap between knowledge and production.

This contest is not about who unveils the cleverest AI model or the most sophisticated humanoid. It is about building the most effective ecosystem connecting universities, laboratories, entrepreneurs, finance, energy, factories, supply chains and markets

This contest is not about who unveils the cleverest AI model. It is about building the most effective ecosystem connecting universities, laboratories, entrepreneurs, finance, energy, factories, supply chains and markets

sities, laboratories, entrepreneurs, finance, energy, factories, supply chains and markets.

Where does this leave India? Delhi recognises the trend and has launched several new missions — on AI, semiconductor production and quantum technologies. It also has a draft robotics policy. But two weaknesses stand out.

First, ambition and imagination are concentrated in government declarations at a time when the private sector contributes more than ever to producing knowledge in the US and China. Indian capital rarely articulates a project for mastering the new forces of production or a new project for science and basic research. This was not always so. Jamsetji Tata helped create the Indian Institute of Science in 1909; the Kirloskars and other western Indian business families sent their children to the Massachusetts Institute of Technology from the 1920s. They recognised that independent India’s future lay in mastering modern science. The Sir Dorabji Tata Trust supported Homi Bhabha in establishing the Tata Institute of Fundamental Research, which formed the nucleus of India’s atomic energy and space programmes. Indian capital has sadly retreated from that tradition.

The Economic Survey 2025-26 puts India’s R&D expenditure at 0.64 per cent of GDP. In comparison, China spends about 2.8 per cent and the US 3.5. The World Intellectual Property Organisation estimates India’s total R&D spend

Kriti Sanon in an ad, me on the poll trail, who will tell us what to wear?



MEHBOOBA MUFTI

WHO DECIDES what a woman should wear? It is a question that India seems to answer differently depending on whether a woman chooses to reveal more or cover more. I remember fighting my first election in 1996. I would travel through rural areas campaigning in a kurta churidar, with a dupatta loosely draped around my neck. The situation was volatile, and many people were reluctant to come out because of the fear of militants. Those who did come were mostly men, especially young boys, for whom seeing a woman campaigning for an election was unusual and highly amusing.

For me, the experience was not always comfortable. My dupatta would slip from my shoulders, and sometimes the wind would lift my shirt. Instead of concentrating on what I wanted to say, I found myself worrying about my clothes. The next day, I opened my cupboard and found an abaya that I had brought back from Medina during Hajj. I put it on, took a scarf to cover my head and went campaigning.

Imagine if, instead of making that personal choice, I had been forced to go to court to seek permission to wear my abaya and hijab. I am not advocating hijab for every woman. Quite the contrary, I believe that every woman has her own understanding of comfort and freedom. For one woman, covering her head may provide confidence and freedom, while for another, revealing her shoulders may do the same. That is my point.

Today, two women have found themselves at the centre of two different controversies. One is being told that her clothes are inappropriate for Indian culture. The other was told by a high court that she could not insist on adding a religious headscarf to her school uniform. But the two cases raise the same fundamental question. Who gets to decide what a woman should wear?

The first is actor Kriti Sanon, whose appearance in a jewellery advertisement for Raksha Bandhan triggered a social-media storm. The controversy intensified after actor and BJP MP Kangana Ranaut criticised the advertisement. Sanon responded by arguing that the essence of a festival lies in its emotions and traditions, not in the clothes a woman wears. She did not stand alone. Among others, Rahul Gandhi came to her defence. Eventually, the jewellery company withdrew the ad.

Then there is Sukaina Rizvi, a student who had completed Class X at Tagore Public School in Attarsuliya, Prayagraj. She approached the Allahabad High Court seeking permission to continue wearing a hijab with her school uniform. The court dismissed her plea, holding, among other things, that she had not placed sufficient material to establish that wearing the headscarf constituted an essential practice of Islam. Unlike Sanon, Rizvi did not have celebrities or politicians rushing to defend her choice. Courts are supposed to be the last resort when citizens believe their rights have been infringed. When even this last door closes, one is left asking where a young woman should go. Rizvi is around my daughter’s age, and perhaps that is why I found myself relating to her dilemma.

The larger issue, however, goes beyond the two women. It begins when a woman’s clothing becomes a measure of her morality, character, religion or loyalty to a particular culture. Sanon’s neckline does not tell us whether she respects Indian culture. Rizvi’s hijab does not tell us whether she respects her school, her country or anyone else.

We celebrate women entering Parliament, occupying boardrooms and becoming pilots, soldiers, scientists, doctors and judges. We speak about equal opportunities, representation and independence. Yet we remain remarkably uncomfortable with one of the most basic expressions of personal freedom: A woman deciding what she wants to wear. We seem to celebrate women’s choices only when they conform to our idea of what is acceptable.

The problem is not merely conservative patriarchy. It is also the increasing politicisation of personal choices involving religion, clothing, marriage and relationships. Questions that should ordinarily remain within the sphere of individual liberty have increasingly become part of political and cultural battles. The so-called “love jihad” narrative is one example of how the personal choices of consenting adults can become matters of public and political scrutiny.

A woman must have agency over her own body, subject only to legitimate and constitutionally valid restrictions. This is also why the judiciary must be cautious about becoming an arbiter of personal morality or religious faith. The same principle of equal treatment should apply when religious practices become controversial, whether the issue concerns places of prayer, religious processions, symbols or practices like animal sacrifices associated with festivals. Constitutional freedoms cannot become conditional rights, protected when politically convenient and restricted when they become uncomfortable for those in power.

We do not have to agree with every choice a woman makes. We do not even have to understand it. But we should defend her right to make it.

The writer is contributing editor on international affairs for The Indian Express. He is a distinguished professor at the Motwani Jadeja Institute of American Studies, Jindal Global University and holds the Korea Foundation Chair on Asian Geopolitics at the Council for Strategic and Defence Research, Delhi

LETTERS TO THE EDITOR

Hormuz deadlock

THE IMBROGLIO between the US and Iran appears to stem from an inadequate intelligence assessment by America (‘In US vs Iran, all roads lead back to Hormuz’, IE, September 1). America must go beyond the objective of neutralising Iran’s nuclear threat and reassure the international community about the smooth conduct of global affairs. The possible way out now is not to pressure Iran over a nuclear deal, but to allow fair play in maintaining its nuclear programme under IAEA supervision.

Parag Deshmukh, Thane

THE STRAIT of Hormuz presents a situation similar to that of the Suez Canal, which also became deeply entangled in the Arab-Israeli wars and remained closed for nearly eight years (‘In US vs Iran, all roads lead back to Hormuz’, IE, September 1). The Suez experience has shown that once a major waterway becomes a bargaining instrument, restoring normal navigation requires extensive diplomatic efforts. The international community should build a stronger multilateral framework to reinforce the principle of commercial navigation and protect merchant vessels.

Vaibhav Goyal, Chandigarh

Meta settlement

META’S \$18-billion settlement acknowledges that social platforms harm children, yet avoids addressing the core problem: Algorithms designed to maximise engagement regardless of consequences (‘Meta’s US deal redraws line of accountability’, IE, September 1). Two-hour daily limits and curfews shift responsibility to parents while Meta’s business model remains unchanged. The issue isn’t usage duration but whether engagement-maximising feeds should be the default for young users. India must learn from this precedent. Effective regulation should demand that platforms prioritise safety over engagement by default, not burden families with constant monitoring.



SYED ATA HASNAIN

PRIME MINISTER Narendra Modi’s presence at the Shanghai Cooperation Organisation summit comes at an unusually consequential moment. The war in Ukraine continues, the Gulf has been shaken by the US-Israeli conflict with Iran, and the international system is searching for a new equilibrium. Hence, the significance of this SCO lies most in who is sitting around the table. PM Modi is there with Russia’s President Vladimir Putin, Chinese President Xi Jinping, Iran’s President Masoud Pezeshkian and the leaders of Central Asia. This is precisely where India needs to be.

The SCO has never been an entirely comfortable strategic space for India. Yet it is important. The PM’s bilateral engagement with Putin covered defence, energy, economic co-operation and the consequences of conflicts in West Asia and the Black Sea for maritime trade. Xi’s presence is equally consequential even without a formal bilateral meeting. India and China are major economies and neighbours whose interests intersect across Asia. This is strategic autonomy in practice: The ability to engage Washington, Moscow and Beijing without allowing any one relationship to determine the others.

What makes this summit different is Iran. The conflict has shown how rapidly a West Asian crisis can acquire Eurasian consequences. The PM’s meeting with President

That is why Bishkek matters beyond the SCO communiqué. The PM’s presence signals that India intends to remain fully engaged wherever Eurasia’s future is being shaped

In Bishkek, a lesson from Nalanda

Pezeshkian carried significance beyond bilateral ties. India emphasised diplomacy, protection of civilians and freedom of navigation and commerce. For India, Iran is also a geography. Pakistan denies India overland access to Central Asia. Afghanistan remains uncertain. Iran is vital to projects such as Chabahar and the International North-South Transport Corridor. After the Gulf crisis, West Asia and Central Asia can no longer be viewed as distinct strategic theatres.

Washington will examine Bishkek for signs of something larger: Whether China, Russia and Iran can transform dissatisfaction with the international order into durable institutional cooperation; whether alternative financial and connectivity structures acquire momentum; and where India positions itself. It would be mistaken, however, to interpret India’s presence as evidence of an emerging anti-Western alignment. Its interests are more complex.

The Central Asian republics understand this. They have relationships with Russia, growing economic engagement with China, and seek wider partnerships with other countries. This is an opportunity for India. I was in Kyrgyzstan in June for the Issyk-Kul International Forum. Before that, I received the SCO Secretary General in Patna. These interactions reinforced that Central Asia desires to rediscover the region’s ci-

vilisational importance. This offers India an advantage: Centuries of civilisational familiarity without a memory of domination. At Issyk-Kul, I spoke of what we in Bihar have begun describing as the Nalanda Approach. Ancient Nalanda was a knowledge ecosystem linking scholars and civilisations across Asia. That principle can acquire contemporary meaning through university partnerships, joint research, scholar exchanges, historical studies, technology collaboration and sustained intellectual dialogue.

India and Central Asia are geographically close but strategically separated. The absence of direct land access has constrained commerce, tourism, academic exchange and human interaction. Chabahar, the INSTC, air connectivity and new multimodal arrangements deserve greater attention.

That is why Bishkek matters beyond the SCO communiqué. The PM’s presence signals that India intends to remain fully engaged wherever Eurasia’s future is being shaped. Strategic partnerships can secure India a place at the table, and connectivity can give those partnerships substance. India has the ability to reconnect with Central Asia through knowledge, culture and civilisational memory. In a world once again dominated by contests for power, that may prove to be a remarkably durable form of influence.

The writer is Governor of Bihar

The writer is former chief minister of Jammu and Kashmir



SHASHANK R JOSHI

ON OCTOBER 3, 2023, South Lhonak Lake in Sikkim burst. A wall of water and debris tore down the Teesta. Homes vanished. Official tallies put the dead at over 50; dozens more were never found. The flood held the front page for two days. What did not hold the front page was the young man in Teesta Bazaar who lost his house, his insulin, and his mother’s medical records. The flood receded. But for six months after the cameras left, the real disaster was a cold chain that never returned, a prescription that could not be refilled, and a health system that had been counted as infrastructure, not as life.

We have framed glacier retreat as a cli-

mate change-related issue. After the latest disaster in Nepal, it is time to look at it from a health perspective. We know what happens when the water arrives. We still barely speak about what happens after it leaves.

Four waves of harm. Wave One: The immediate kill. Drowning, trauma, hypothermia. Kedamath 2013, Chamoli 2021, Sikkim 2023 — deaths were counted. Injuries were not. Crush wounds. Fractures. Frostbite.

Wave Two: The contamination. Glacial silt plus sewage plus animal carcasses is a laboratory for acute diarrhoea, hepatitis A and E, typhoid, skin infections and leptospirosis. When the primary health centre goes under, a pregnant woman delivers on the roadside. Vaccines warm. The outbreak begins after the rescue teams leave.

Wave Three: The invisible disruption. This is the largest wave, and the least

counted. Himalayan states carry a heavy load of non-communicable disease. A disaster like that in Nepal snaps the drug chain. Insulin needs refrigeration; electricity may be out for weeks. Dialysis patients are forced onto journeys of hundreds of kilometres, and tuberculosis treatment is interrupted.

Wave Four: The long shadow. After the Sikkim disaster, clinicians reported old patients relapsing and new ones arriving with

A disaster like that in Nepal snaps the drug chain. Insulin needs refrigeration; electricity may be out for weeks. Dialysis patients are forced onto journeys of hundreds of kilometres

Real Creator IAS Edition https://t.me/+2RvD_RG0mjMzg1 panic, hyperarousal and the inability to sleep when rain begins. Children stop going to school. Farmers watch a field turn into a stone bed. In the wetlands the flood leaves behind, mosquitoes appear at altitudes where they were never a public-health concern. The glacier redraws disease ecology.

Preparedness needs to be rewritten from a health perspective. First, map the downstream health footprint. ISRO and NDMA already rank dangerous water bodies. Overlay that map with Health and Family Welfare data: Primary health centres, sub-centres, cold-chain points, antenatal case loads, insulin-dependent patients, dialysis chairs. Second, treat early warning as a clinical intervention — to lift an oxygen plant, move vaccines, shift women in labour, and lock the NCD cupboard onto higher ground. Third, make the hill hospital climate-proof. The Na-

tional Programme on Climate Change and Human Health must name glacier-related disasters as a core hazard for Himalayan districts. Every district hospital in those catchments needs elevated drug storage, a solar-backed cold chain, a seven-day emergency kit for hypertension, diabetes, asthma and mental-health first aid, and household safe-water stock. Fourth, watch for 90 days, not 90 hours. Post-disaster, surveillance should be syndromic: Diarrhoea, jaundice, wound infections, breathlessness, distress and new-onset fever where vectors have new water. The next glacier tragedy will ask whether anyone counted the insulin, the dialysis chair, the labour room and the child who still startles when the river rises in a dream.

The writer is an endocrinologist and public health physician based in Mumbai

AROUND 8:30 PM, a doctor on duty in the Gynaecology Department of Kolkata's RG Kar Hospital rushes out for a quick break. Dressed in blue scrubs, the disposable covers on her shoes still on, she walks straight towards the food corner adjacent to the old Emergency building.

It was here, in the seminar room on the third floor of this building, that a 31-year-old postgraduate trainee was raped and murdered two years ago, a crime whose memory still casts a long shadow over the institution. The lower levels of the four-storeyed building are now a designated crime site, cordoned off by green covers.

The old Emergency building is among the few unlit spaces on the 30-acre campus. "You won't find a dark spot now. CISF jawans are stationed 24x7. In case of any problem, you can approach them immediately," says the doctor, a first-year resident, as she walks straight past a deserted canopy with worn-out banners and a few posters demanding "*bichar chai* (we want justice)".

Two years ago, this site, 'Abhaya Manch', named after the pseudonym given by the public and media to the RG Kar rape-murder victim, was the scene of one of the biggest protests Kolkata saw in the aftermath of the crime. For nearly three months, junior doctors from across the state, many of them young women like the victim, sat in protest here, demanding better working conditions and accountability from the Trinamool Congress government.

Many point to the tragedy, and the handling of the protests that followed, as among the many alleged mishandlings that triggered the fall of the TMC government and that led to the BJP coming to power in the state for the first time.

Since then at RG Kar, North Kolkata's key referral government hospital, where thousands once stood demanding accountability, daily life and medical emergencies have taken over. Some of the everyday demands the protesters raised then — rest spaces for doctors in the middle of their long, exhausting shifts and washrooms for women medical professionals — were drowned out, overtaken by dramatic political happenings in the state. Other, more visible changes were effected quickly. And as always, some things moved, others stayed still.

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PHOTOS: PARTHA PAUL

TWO YEARS SINCE RAPE-MURDER

ONE LONG NIGHT AT RG KAR

Two years after a former civic volunteer raped and killed a 31-year-old doctor on duty at RG Kar Medical College & Hospital, a lot has changed. Yet, gaps remain. SWEETY KUMARI tracks the night shift at a hospital that became the epicentre of a fierce anti-government campaign



(Above) Inside one of the wards at RG Kar Hospital in Kolkata, where doctors manage overwhelming patient loads; security personnel at the Trauma Care Centre from where the Emergency department now runs

ensure no unnecessary loitering takes place inside the campus."

While the heightened security is reassuring, it serves as a constant reminder of why that protection became necessary.

The intern from Varanasi says, "I have at least one 24-hour shift every week. When on night duty, my parents call me from Varanasi every few hours just to ensure I am safe. I still feel a bit uneasy going out for tea, but when I see the guards, it gives me confidence."

Yet, she says, it shouldn't have come down to this. Doctors should not have to face a tragedy and should not need CISF "just to feel secure", she says.

As the clock strikes 11.30 pm, the hospital's main gates are partly closed, routing all traffic through a guarded side gate. Between 11:30 pm and 12 am, a joint contingent of armed CISF personnel, administrative staff, and Kolkata Police officers march through the campus corridors, blowing their whistles. "We do this daily to build confidence among the nurses, doctors, and patient families. Troublemakers are deterred by this routine," says a Kolkata Police officer on duty at the RG Kar outpost.

Dr Md Doyel Nur, a postgraduate trainee

who grew up in Murshidabad and completed his MBBS from a private college in Bangladesh, grabs a midnight meal at an eatery near the old Emergency building. "If the CISF weren't deployed here today, I don't think women PGTs [postgraduate trainees] would take night-call duties as smoothly or easily," he says.

'We are right back at zero'

Despite the security fixes, many point to the broader structural problems that persist, such as the lack of adequate, clean toilets for patients and doctors and spaces where doctors can rest in between shifts.

It's 7:45 pm and a young medical intern whose family is from Bhagalpur, Bihar, is sitting on the footpath near the principal's office, holding a lukewarm cup of tea.

"If you are on duty for 48 hours and are on your periods, every time you want to change a pad or pass urine, you have to leave the department, walk about seven minutes all the way to your hostel. Are dedicated, safe washrooms, separate for women doctors, such a big thing that we are asking for?" she says.

She is soon joined by a few other women colleagues who have stepped out of their hostel to join an 8 pm night shift at the Trauma Care Centre.

One of her colleagues admits to a startling daily ritual: "Today, I have a two-hour

duty, so I drank enough water. But now I won't sip any more water. I avoid using the department washrooms, and it's impossible to walk back to the hostel every time."

On the ground floor of the Trauma Centre, Emergency Medical Officers, doctors, Group-D staff, and contractual workers share a resting space — it's also a space where an initial registry is maintained for cases that need police intervention.

One washroom caters to both the General Medicine and Trauma units at the centre. Inside the washroom is a small room that the female staff keep locked for their exclusive use, but it is hardly a substitute for separate washrooms.

Doctors also say that one of the key demands of the protesters — dedicated, fully functional on-call duty rooms split by gender — has gone unaddressed.

Resident doctors frequently work uninterrupted 24- and 48-hour shifts, and in the absence of dedicated resting rooms, they are often forced to take brief moments of rest on vacant hospital beds, makeshift couches, or empty seminar halls. It was during one such exhausting shift that the RG Kar victim, who had sought a few hours of rest in the seminar room late at night, was assaulted and murdered.

During Supreme Court hearings in the rape-murder case, the hospital had committed to creating a safer environment and laid down directives for separate, biometric-secured resting spaces for men and women doctors. But two years on, in the absence of any such separate areas to rest, the staff continue to share the common areas.

Trinnesh Mondal, a second-year Postgraduate Trainee in General Surgery, says, "Every department ought to have a dedicated resting room for doctors. After 4 pm, there is only one washroom left for doctors, and that is shared. The rooms where doctors go to rest are easily accessible — anyone can walk in," he says.

Dr Nur, the postgraduate trainee from Murshidabad, says that in the Orthopaedics and Surgery departments, male interns often stay back in wards to provide security and support to their female colleagues, because dedicated, secure doctors' rooms do not exist. Across departments, patients, doctors, nurses and contractual workers share the same cramped rest spaces and washrooms.

A junior woman doctor says, "One of the key theories surrounding Abhaya's case is that she was resting with the door open in a common duty room accessible to anyone. Today, many of us feel that our fundamental demands remain unfulfilled. We feel we

• THE CASE SO FAR

THE INCIDENT

On August 9, 2024, a 31-year-old second-year PG student was found unconscious in the seminar hall of the hospital's Emergency building, and later declared dead. Police registered a case of rape and murder

WHAT HAPPENED NEXT

● The West Bengal Junior Doctors' Forum launched a protest across all public sector healthcare facilities in the state

● On August 14, 2024, hundreds of thousands of people, predominantly women, hit the streets in what was called the 'Reclaim the Night' march

● Later that night, a mob breached the hospital, vandalised areas near the Emergency building, the crime scene

THE INVESTIGATION

● The Kolkata Police, which initially probed the case, arrested a civic volunteer, Sanjay Roy, as the prime accused on August 10

● On August 13, the Calcutta High Court officially transferred the probe to the CBI

● Former RG Kar principal Sandip Ghosh and former Tala police station officer-in-charge Abhijit Mondal were arrested and accused of delaying the FIR and of tampering with the crime scene

● The CBI continues to file supplementary chargesheets before the Sealdah court. The HC has directed it to conclude the probe in 3 weeks. Next hearing is on September 24, 2026

THE ACCUSED

● On January 20, 2025, the Sealdah court sentenced Roy to life imprisonment until death

● The CBI filed an appeal before the HC, seeking the death penalty

are right back at zero."

Calls and texts to Medical Superintendent and Vice-Principal Dr Saptarshi Chatterjee went unanswered.

The victim's mother, Ratna Debnath, now a BJP MLA from Panihati, too, refused to comment on the changes at RG Kar.

The West Bengal government recently reopened its review of the criminal case, with newly appointed Health Minister Dr Sharadwat Mukherjee announcing a fresh evaluation into the initial handling of the case.

There are other systemic problems, including the patient burden at RG Kar, that were spoken of in the aftermath of the rape-murder, but remain unresolved.

The hospital's Outpatient Department sees an average footfall of 4,500 to 6,000 patients every day and maintains a consistent inpatient bed occupancy of around 1,500.

"CCTVs have increased, but the central referral system that was supposed to be activated never materialised. This would have ensured that the pressure of district cases wouldn't fall entirely on tertiary centres like RG Kar," says Dr Mondal, the doctor in the General Surgery department.

The closure of the old Emergency building has further strained resources. "The combined pressure of Trauma Care and Emergency now falls entirely on one building," he says.

Speaking on condition of anonymity, a senior administrative official at RG Kar Hospital reveals that patient care infrastructure, too, faces critical shortfalls.

"The Emergency department handles at least 150 patients daily. In the absence of washrooms, bedridden patients must rely on their families to bring bedpans while ambulatory patients walk 150 metres to a pay-and-use toilet outside," the official says.

As the night wears on, doctors manage overwhelming patient loads in their wards. In the Urology department, a single junior doctor routinely manages between 50 and 60 critical patients per shift.

Around 1 am, a postgraduate trainee from the Labour Department steps out for a brief break during her 24-hour shift. "What you see on the surface is the change. There are CISF personnel everywhere. But our hostel and rest conditions remain in a pathetic state," she says.

Outside the women's hostel, a group of interns sit on plastic chairs, sharing momos and biscuits. One of them points to two women CISF officers sitting under a street-lamp and says, "The only real change in the last two years is their deployment. But we constantly wonder — all this security is only at RG Kar. What about the other government medical colleges across Bengal? What is the guarantee that such an incident won't happen somewhere else? And how long will the CISF stay here?"

A quiet moment

At 12:30 am, near Trauma Care, Payal Aich, 20, a resident of Sodepur, walks nervously through the courtyard, clutching a prescription. Her father, a liver cancer patient, has been rushed to the centre, and the doctors have told her to urgently buy an injection. Approaching a woman CISF officer, Payal asks for directions to the pharmacy.

The officer points to a dimly lit lane, instructing her to turn left and walk for five minutes. Hesitant, Payal asks, "Could you please accompany me? That lane looks deserted." The woman constable walks alongside her towards the pharmacy.

The quiet moment reflects the reality of RG Kar today: security personnel filling some gaps, while healthcare workers and patients confront others that remain — and are widening.

"Every department ought to have a dedicated resting room. The rooms where doctors go to rest are easily accessible, anyone can walk in," says a trainee doctor

OIL IMPORTS FROM VENEZUELA JUMPED 60.2% IN AUGUST

Russian oil imports fell 26% in Aug amid supply pressure, China factor

India's total oil imports in August stood at 4.62 million bpd, down 8.4% from July's 5.04 million bpd

Sukalp Sharma
New Delhi, September 1

INDIA'S OIL imports from Russia in August declined 26% from the historic highs in the previous month amid tighter Russian export availability as well as stronger competition from Chinese refiners, according to provisional tanker data.

Maintenance shutdowns at a few Indian refineries also likely contributed to lower crude intake.

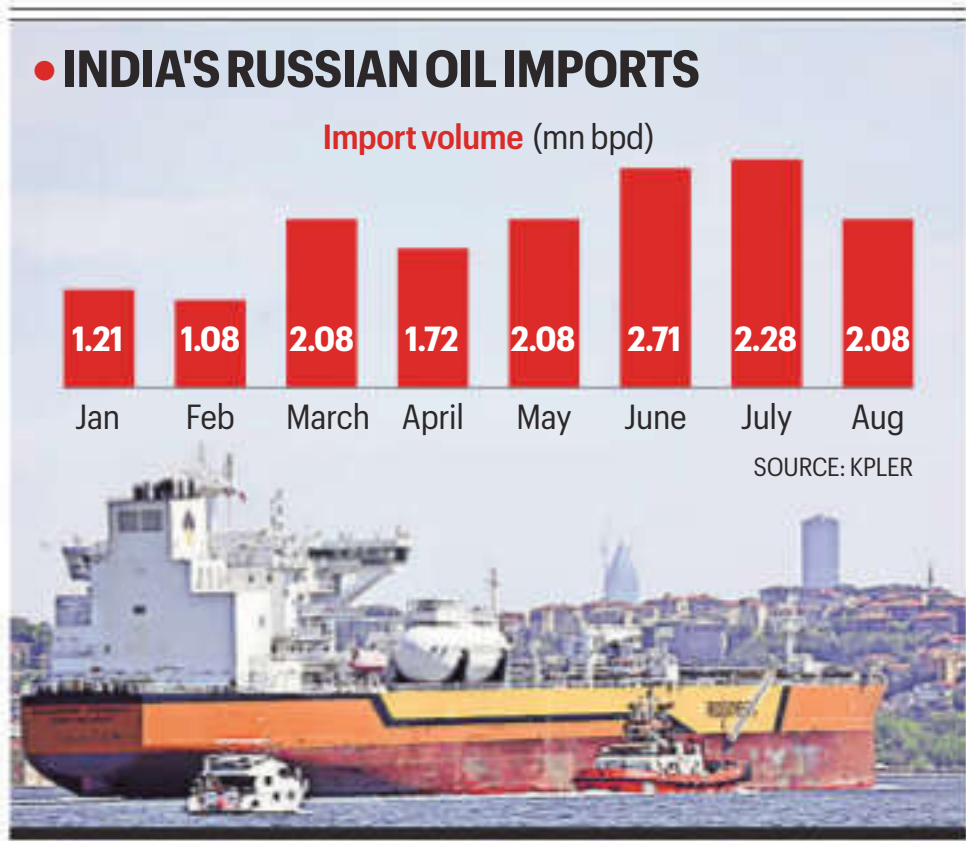
The fall in Russian volumes was the primary reason for the over 8% decline in India's overall oil imports in August. Notably, though, oil imports from Venezuela touched their highest monthly levels since 2020. With the US allowing Caracas's oil to flow into the global market, India restarted imports of Venezuelan oil a few months ago after nearly a year of zero imports.

According to vessel tracking data from commodity market analytics firm Kpler, India imported 2.08 million barrels per day (bpd) of Russian oil in August, down 26.3% from July's record levels of 2.82 million bpd.

India's total oil imports in

August stood at 4.62 million bpd, down 8.4% from July's 5.04 million bpd. Moscow's share in New Delhi's crude diet declined to 45% in August from 55.9% in July. According to Kpler, the shift points to market normalisation rather than a structural retreat from Russian crude, with flows expected to stabilise at 2.0 to 2.5 million bpd in the foreseeable future, which suggests that Russian oil is likely to remain the mainstay of India's oil imports. The import volumes, however, may come under some pressure due to the evolving energy market conditions with Russia's ability to export more being constrained and intensifying competition for Russian barrels from China.

"Russia is exporting less crude both to India and overall, just as China is competing more aggressively for available cargoes. The question for the coming months is therefore whether August represents a temporary retreat or the start of a period in which Russian barrels become scarcer, costlier and harder for Indian refiners to secure," said Abu Dhabi-based energy ana-



lyst Natalia Katona. Ukrainian attacks on Russia's oil and gas infrastructure is a key reason for the pressure on Russian oil exports. Attacks on export infrastructure in the Black Sea have become a tangible threat to navigation of energy tankers in the region.

Freight economics are incentivising avoiding the Black Sea routes altogether, according to Katona. For instance, moving a Suezmax tanker from the Black Sea port of Novorossiysk to India's west coast now costs about \$20 million, or roughly \$20 per barrel, compared with about \$13 per barrel if the tanker starts from the Baltic Sea ports. But dispatches from the Baltic Sea

ports carry their own risks, as Russian tankers sailing around Europe face detention or seizure by European countries.

"That has encouraged greater use of the Northern Sea Route (NSR), for which August and September are the peak traffic months even in a normal year due to the thin ice levels. With Black Sea drone threats adding to the pressure, Russian exporters are sending more vessels through the route, logically making China the most cost-competitive destination," Katona said.

Competition for Russian oil from China has picked up due to a few more factors, which in-

clude lower Russian oil exports as Moscow has been trying to maximise domestic refinery production to meet domestic fuel demand amid Ukrainian attacks on its energy infrastructure, and the fall in Iranian oil volumes available to Chinese refiners amid the Strait of Hormuz crisis.

India's crude import strategy has shifted sharply since March 2026 as Strait of Hormuz disruptions tightened West Asian oil flows and increased freight risks. Russian crude remains the backbone of India's import slate, while refiners have diversified aggressively towards African, North American, and South American barrels to offset the drop in supplies from the Gulf.

Interestingly, oil imports from Venezuela in August jumped 60.2% over July to 350,000 bpd, the Kpler data shows. With the US capturing Venezuela's then president Nicolás Maduro early January, Trump had said that Washington would take control of Caracas's oil sector. After that, a few commodity traders were authorised by Washington to sell Venezuelan oil globally, which had been under US sanctions.

About 40% of India's crude imports usually came through the Strait of Hormuz, and a large part of that supply has effectively been offline.

FULL REPORT ON
WWW.INDIANEXPRESS.COM



Finance Minister Nirmala Sitharaman met US Treasury Secretary Scott Bessent on the sidelines of the G20 Finance Ministers and Central Bank Governors meeting, in Asheville, on Monday. X/@FINMININDIA

Current account deficit widens to \$4.2 bn in Q1

ENS Economic Bureau
Mumbai, September 1

INDIA'S CURRENT account deficit (CAD) widened to \$4.2 billion, or 0.5% of GDP, in the first quarter of 2026-27, from \$3.4 billion, or 0.4% of GDP in the corresponding quarter a year ago, according to data released by the Reserve Bank of India (RBI).

The modest widening in the CAD came primarily on the back of a sharper merchandise trade deficit. The merchandise trade gap increased to \$86.1 billion in Q1 2026-27, compared with \$68.9 billion in Q1 2025-26, reflecting the continued pressure from India's import bill, the central bank said.

However, the impact of the wider trade deficit was partly offset by stronger earnings from services and higher remittance receipts.

Net services receipts rose to \$51.6 billion during the quarter from \$47.9 billion a year earlier. Services exports increased year-on-year across major segments, including computer services, other business services and transportation services, the RBI said.

The primary income account also provided some relief. Net outgo on the account, which largely reflects investment income payments, declined to \$10.5 billion in Q1 2026-27 from \$13.3 billion in the year-ago quarter, it said.

FOREIGN ASSETS DISCLOSURE SCHEME

Concerns rise over high fee on ESOPs, small investments

Aanchal Magazine
New Delhi, September 1

● *A salaried individual had invested Rs 90,000 in stocks listed in the US, now trading at a loss. The money transfer was part of the annual information statement (AIS) of the person's income tax return (ITR) but he did not disclose it separately in the Schedule FA (foreign assets). Under the new scheme, he will have to pay Rs 1 lakh upfront for disclosing the loss-making investment.*

● *An employee with a foreign company operating in India had the vesting details of his employee stock ownership plan (ESOP) as part of his salary, but had not declared it separately in the Schedule FA. He has to now pay Rs 1 lakh just as disclosure charges under the new scheme.*

When the government proposed the foreign assets disclosure scheme in this year's Budget, the intent was well specified — to address "practical issues of small taxpayers like students, young professionals, tech employees, relocated NRIs" among others.

However, the disclosure window, Foreign Assets of Small Taxpayers – Disclosure Scheme (FAST-DS), launched on August 16, has now resulted in doubts and questions as individuals face high fees and penalties. The problem is more acute for salaried individuals who have received restricted stock units (RSUs) or ESOPs, and not reported them before. Even for cases where there has not been any actual gain, the employees will now be required to pay Rs 1 lakh for disclosure under the scheme,

which is being seen as too steep an amount by many. "The ESOPs are part of my salary, just that I did not disclose it separately earlier. Asking for Rs 1 lakh as an amount for only disclosure is too high," the employee with the foreign company cited above said.

Change in status

Experts said that the change in status from a non-resident to an Indian resident needs to be taken note of by the authorities, especially for cases where salaried employees took ESOPs from their global companies. "Many of them were non-resident Indians (NRIs) then and were later deputed to India and became Indian residents. They did not disclose the old details earlier and are disclosing it now. After disclosure, you get the notices saying how did you acquire it? The NRIs have turned into residents, that has to be taken note of," a top executive with an asset management company said.

ESOPs are key salary components in many sectors, especially in tech sector, startups and foreign companies. The scale of ESOPs in India's net outflows can be seen from the sharp rise of the flows under "financial derivatives (other than reserves) and employee stock options" of the Balance of Payments (BoP) in recent years. In 2025-26, this figure stood at just under \$24 billion, up 8% from a net outflow of around \$22 billion in 2024-25. However, it rose sharply in 2024-25, almost tripling from nearly \$8 billion in 2023-24. Many employees are considering filing an up-

dated return for such anomalies rather than disclosing under the scheme, with greater scrutiny going ahead being one of the key concerns. When asked, tax officials pointed out that the Black Money (Undisclosed Foreign Income and Assets) and Imposition of Tax Act doesn't recognise updated returns for income that was never before taxed or disclosed. "So even if the updated return is filed, he'll still be liable to tax and penalty under the Black Money Act. That's why it is better to disclose under FAST-DS. There is no intention of more scrutiny for such declarations," an income tax official said.

'Disproportionate penalty'

The scheme has two categories: i) undisclosed and never-before-taxed foreign income or asset outside India up to Rs 1 crore; ii) asset up to Rs 5 crore outside India, which was already offered to tax or was acquired under non-resident status, but not declared properly in the ITR. Under the first category, an assessee needs to pay 30% of fair market value of assets or undisclosed income as tax and 30% as additional income tax in lieu of penalty, while for the second category, the disclosure fee is Rs 1 lakh. The question is also of materiality — the maximum amount of error allowed in the financial statements before they are considered wrong. Experts pointed out that if the amounts are not significant enough, the penalty of Rs 1 lakh looks disproportionate.

After Q1 surprise, economists hike FY27 GDP growth outlook

Siddharth Upasani
New Delhi, September 1

THE RESERVE Bank of India's (RBI) GDP growth forecast of 6.7% for 2026-27, made on August 5, is looking increasingly conservative, with economists making sharp upward revisions to their predictions after Monday's blockbuster 7.8% growth print for April-June.

Ranging from 20 basis points to 80 basis points (bps), the growth upgrades made by economists on Monday and Tuesday have been such that the consensus number is now 7.2%, up from 6.7% earlier, according to estimates of 10 economists. Their forecasts are now in the range of 6.9-7.5%.

GDP growth has been higher than 7% in the last three years: 7.3% in 2023-24, 7.2% in 2024-25, and 7.8% in 2025-26. A full-year growth print of over 7% in 2026-27 would make it four years in a row.

According to ANZ economists Dhiraj Nim and Sanjay Mathur, the April-June growth number "marked the 12th consecutive quarter of positive surprise relative to market expectations". While the RBI had forecast 7%, market economists were closer to 7.3-7.5%, with only a small number predicting that growth could be as high as 7.8-8%. However, even those who predicted such a high number have made a sharp upward revision to their forecast for 2026-27 as a whole. Soumya Kanti Real Creator IAS Edition <https://whatsapp.com/channel/0029Van2VRb6RGJOKH6oBd0F>

Ghosh, State Bank of India's Group Chief Economic Adviser, has raised his forecast by 70 bps to 7.3%, having predicted that growth may come in at 8% in April-June. "GDP growth has continued to surprise on the upside," said Upasana Chachra and Bani Gambhir, economists at Morgan Stanley, in a note. According to them, the strength in manufacturing and investment activity "aligns with our view of India being on the cusp of a capex up-cycle".

"The stronger-than-expected April-June data, alongside the robust tracking data for July-September so far, point to sustained growth momentum. Against this backdrop, we raise our FY27 real GDP growth forecast to 7.3% (from 6.7%)," they said. Those who didn't raise their growth forecasts admitted there is an upside risk to their predictions. However, some chose to keep their powder dry keeping in mind an expected slowdown in the second half of the year and the risks to the growth outlook.

For instance, ICICI Securities Primary Dealership's economists led by A Prasanna — who retained their forecast of 7% — see five risk factors for growth in the next three quarters: an unfavourable base effect, crude oil prices, any impact on agriculture growth and rural demand from sub-par rains, and the hit to India's exports from weaker foreign demand due to tighter financial conditions.

In the same vein, they expect the RBI to also consider interest rate hikes, as signalled by the central bank's officials in the minutes of the Monetary Policy Committee's August 3-5 meeting.

"Fiscal policy choices will also be crucial. In case the government chooses to stick to the fiscal deficit target, and given the front loading on the capex growth front, there could be marginal headwind to demand from that side as well," they added. As per the RBI's own forecast, GDP growth is seen at 6.4% in July-September, 6.5% in October-December, 6.8% in January-March 2027, and 7.3% in April-June 2027. The RBI's MPC will next meet October 5-7, where the central bank is expected to raise its own prediction of growth this year.

"The strong GDP data should bolster the MPC's confidence on growth, and sharpen its focus on inflation," Nomura's Sonal Varma and Aurodeep Nandi said.

"The key question is whether stronger growth will lead to more demand side inflationary pressures — which have been absent thus far, despite the surge in input costs."

Data released earlier this month showed headline retail inflation inched up to 4.45% in July from 4.38% in June — the second month in a row it was above the RBI's medium-term target of 4%.

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● THE OPERATIONAL FRAMEWORK NOTIFIED ON MONDAY PUTS CHIP DESIGN AT THE FRONT OF THE NEW SEMICONDUCTOR MISSION

Semicon 2.0: How India aims to build a domestic chip design ecosystem

Soumyarendra Barik
New Delhi, September 1

THE CENTRE'S Rs 1.27 lakh crore Semicon 2.0 programme has laid out a three-part push to build domestic chip-design companies, offering government-backed support for developing strategic semiconductor technologies, commercially viable chips, and getting those products deployed in the market.

The operational framework notified Monday puts chip design at the front of the new semiconductor mission.

Of the programme's six pillars and 10 categories, its first pillar is entirely focused on design, with separate tracks for chips required for national and strategic priorities, commercial

semiconductor products, and a deployment-linked incentive for newly developed chips.

The design push seeks to address a key gap in India's semiconductor ambitions. While the country has emerged as a major global base for chip-design engineers, much of this work is currently done for multinational semiconductor companies.

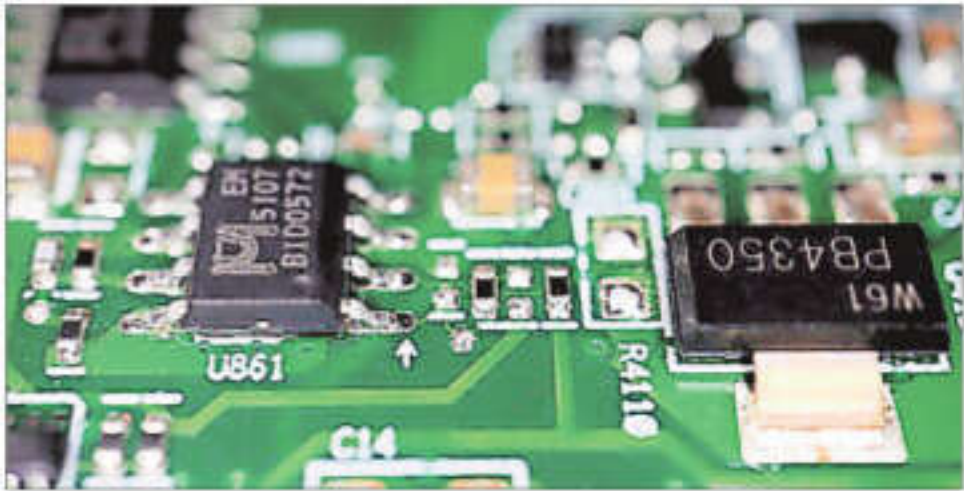
Semicon 2.0 seeks to build more Indian-owned intellectual property and fabless semiconductor companies — firms that design and sell chips while outsourcing their physical fabrication.

Boosting chip design

The first track is aimed at semiconductor technologies

considered important for national security and critical infrastructure. The government will identify IP, chips, systems-on-chip (SoCs) and modules that it wants developed, including building blocks for compute, memory, radio frequency, power, networking and sensors. A second track is meant for commercial chip-design companies.

Here, the government will provide access to expensive electronic design automation tools, multi-project wafer fabrication services, IP cores, compute subsystems and post-silicon validation facilities. Start-ups and MSMEs can receive milestone-linked seed funding of up to Rs 15 crore, or 50% of the project cost,



The design push seeks to address a key gap in India's semiconductor ambitions. REUTERS
Real Creator IAS Edition https://t.me/+2RvD_RG9mIjMzg1
The supported product until 1.5 times the government assistance has been recovered. For this commercial category, eligibility has also been widened to companies owned and controlled by Overseas Citizens of India (OCIs), provided they are incorporated and headquartered in India and maintain a significant operational and manpower presence here. The IP and associated design and development files will have to remain in India.

"I was also glad to see that the scheme has this time been opened up to companies owned by Overseas Citizens of India which is a very good decision, since they bring rich global experience that will help create truly advanced design companies in India," said Arjun Malhotra, co-founder of HCL and chairperson of the EPIC Foundation.

Helping Indian chips find buyers

Semicon 2.0 also introduces a separate deployment-linked incentive, aimed at the next problem after successfully designing a chip: getting customers to adopt it at scale.

Eligible semiconductor IP, chips and SoCs launched after the scheme's announcement will receive a reimbursement equivalent to 9% of their net sales for five years.

The benefit is capped at Rs 30 crore per application and Rs 120 crore for a company, including its group entities, across multiple products. This is particularly relevant for young fabless companies, which can face a hurdle convincing electronics manufacturers to switch from established overseas semiconductor suppliers to a newly developed Indian chip.

Broader ecosystem

The scheme is also aimed at filling gaps across the semiconductor supply chain. Companies setting up semiconductor-equipment R&D facilities, plants manufacturing wafers, photomasks, photoresists, substrates, chemicals and gases, testing facilities, or units producing semiconductor equipment and components can receive 30% capital expenditure support. Equipment manufacturers will additionally get a production-linked incentive that declines from 10% to 2% over five years on the value of their bill of materials sourced domestically. Large silicon wafer fabs will be eligible for 40% capex support.

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• DEFENCE

INS Nipun: Key boost to India’s deep-sea abilities



The INS Nipun diving support vessel. X/@INDIANNAVY

Sushant Kulkarni
Pune, September 1

THE INDIAN Navy commissioned INS Nipun, the second diving support vessel (DSV) of the Nistar class, in Mumbai on Monday. The vessel will strengthen the Western Naval Command’s deep-sea diving, underwater intervention and submarine rescue capabilities.

What is a DSV?

A DSV is a specialised platform that allows a navy to sustain complex underwater operations for extended periods, particularly in deep and challenging waters. Naval operations often require divers and specialised teams to inspect, repair, recover or intervene around ships, submarines and other underwater assets. A DSV provides the diving systems, medical facilities and support needed for such missions, reducing dependence on shore-based facilities, and enabling quick response to underwater contingencies. The Navy undertakes extensive diving operations in the Indian Ocean Region for submarine rescue, underwater inspection, testing or salvage, and recovery of objects, ships or aircraft lost at sea. Earlier, the Navy operated Russian-origin submarine rescue vessels and relied on a mix of shore facilities along with specialised diving units and suitably equipped naval vessels. But these lacked the multidomain operational capabilities and ability of long deployments at sea. In 2018, the Navy signed a contract with Hindustan Shipyard Ltd, Vishakhapatnam, for construction of two DSVs, the first of which — INS Nistar — was commissioned in July 2025.

‘Mother ship’

Admiral Krishna Swaminathan, Chief of the Naval Staff, said at the commissioning ceremony of the 9,000-tonne vessel: “Nipun adds specialised capability to support complex underwater operations and respond to emergencies in one of the most demanding and mysterious environments known to the world.” Nipun is installed with dive equipment and can undertake deep-sea saturation diving — this denotes operations where divers live under pressure for long periods to work deep underwater. “A side diving stage has also been provided for undertaking diving operations. The remotely operated vehicles further enhance the ship’s operational capabilities by facilitating diver monitoring and salvage operations,” the Navy said. Nipun also serves as the “mother ship” for deep submergence rescue vessels (DSRVs) “to evacuate personnel in case of an emergency on a submarine”, the Navy said. Currently, India has two DSRVs. Nipun has a self-propelled hyperbaric lifeboat — a pressurised lifeboat that can independently evacuate divers and diving compression chambers. It can help in recovering of damaged, sunken or stranded ships and equipment.

Maritime preparedness

“For a navy operating across the vast Indian Ocean Region, the ability to sustain specialised underwater operations at sea is an important part of preparedness. This is particularly relevant to submarine operations, where an accident or technical emergency can quickly become a race against time,” a retired Navy officer, who has served on submarines, told *The Indian Express*.

For India, this is significant as underwater capabilities become increasingly important to maritime security. “The induction of indigenous DSVs also means the Navy is building and sustaining specialised expertise and equipment domestically, while strengthening its ability to provide submarine rescue assistance to regional partners,” said the retired officer.

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• INDUS WATERS TREATY

With India rejecting Hague court order, the road ahead



AMITABH SINHA

THE PERMANENT Court of Arbitration, adjudicating on a dispute raised by Pakistan on the Indus Waters Treaty, has passed two more orders against India. It has ruled that India’s decision to put the Treaty in ‘abeyance’ was “not permissible under the Treaty or other applicable rules of international law”, and therefore the Treaty — which governs the sharing of six trans-boundary river waters between the two countries — remained “fully in force” and India continued to be bound by it. The Court also directed India to halt construction work at the Ratle Hydroelectric Project, as requested by Pakistan, till the technical dispute over it is settled. India has not been participating in this arbitration process, underway for four years, having maintained that the Court was constituted in violation of the provisions of the Treaty. A neutral expert had already been appointed to adjudicate on the same issue, and the Treaty does not allow parallel resolution processes on the same dispute. As such, India said the Court lacked legitimacy, and did not appoint its two arbitrators on the Court. The Court went ahead with its proceedings with two arbitrators appointed by Pakistan, and three ‘umpires’ nominated by institutions mentioned in the Treaty.

India’s rejection

India’s reaction to the two orders on Monday was on expected lines. “This so called Court was constituted by the World Bank in patent breach of the terms of the Treaty and India categorically rejects its so-called award... India’s decision to hold the Indus Waters Treaty in abeyance remains in force,” the Ministry of External Affairs said. The two set of rulings on Monday happened to be the fourth ‘award’ from the Court of Arbitration, set up in September 2022, to adjudicate on objections raised by Pakistan over the construction of a couple of hydropower projects in Jammu and Kashmir. All the ‘awards’ have, unsurprisingly, gone in favour of Pakistan. In its earlier ‘awards’, the Court has, among other things,

• THREE LEVELS OF DISPUTE RESOLUTION IN THE TREATY

Any ‘question’ over the interpretation or applicability of the Treaty has to be addressed first by the **Permanent Indus Commission**, comprising the Indus Commissioners of the two countries.

If they are unable to resolve the ‘question’, a ‘difference’ is deemed to have arisen.

If the nature of the ‘difference’ is one of the 23 different specified kinds, this can be referred to a **neutral expert**.

If the nature of the ‘difference’ is something other than the 23 specified types, it is considered to have become a ‘dispute’, which needs to be adjudicated by a **Court of Arbitration**.

The Court of Arbitration also comes into the picture if the neutral expert decides that the whole matter, or a



An IWT hearing at the Court of Arbitration, The Hague, in April.

part of it, should be treated as a ‘dispute’, or if both the parties decide on this route at any point of time.

In the present case, there was no agreement between the two Commissioners to treat the ‘difference’ as a ‘dispute’. Nor was there a recommendation from a neutral expert that it needed to be treated as a ‘dispute’.

Also, the World Bank had set up a neutral expert at India’s request. Setting up a Court of Arbitration on the same issue was about instituting a parallel process, which is not allowed in the Treaty. It could also lead to the absurdity of the two processes producing different and irreconcilable decisions.

Real Creator IAS Edition <https://whatsapp.com/channel/0029Van2VRb6RGJOKH6oBd0F> Council. Another alternative would be to get the Security Council or the UN General Assembly to refer the matter to the International Court of Justice.

The treaty Under the Treaty, ‘Eastern Rivers’ of the Indus system — Sutlej, Beas and Ravi — are for India. Pakistan gets water from the ‘Western Rivers’ — Indus, Jhelum, and Chenab.

• **The Treaty** allows India limited use of Western rivers too, but this has not been possible because of Pakistan’s objections to anything India builds on them

These are far-fetched scenarios, however, and unlikely to play out as per Pakistan’s desires. India has much greater clout at the UN, and can get such moves scuttled.

Besides these efforts, the other option for Pakistan is to try and create a narrative painting India as someone that does not respect international law or abide by treaty provisions. This is something that Pakistan is already indulging in, and the efforts are almost certain to intensify. India, besides creating a diplomatic counter-narrative, is preparing to fight the legal battle, if it becomes necessary. It is not that India does not have a legal case, and it is confident that it can defend its decision to put the Treaty in abeyance.

Road ahead for Pakistan

The best case scenario for Pakistan would be to get the UN Security Council to pass a resolution against India, framing its dispute over the Treaty as a security issue. It has been working towards that aim, and is almost sure to take a shot at it during the remaining four months of its tenure as a non-permanent member of the Security

Council. Another alternative would be to get the Security Council or the UN General Assembly to refer the matter to the International Court of Justice. These are far-fetched scenarios, however, and unlikely to play out as per Pakistan’s desires. India has much greater clout at the UN, and can get such moves scuttled. Besides these efforts, the other option for Pakistan is to try and create a narrative painting India as someone that does not respect international law or abide by treaty provisions. This is something that Pakistan is already indulging in, and the efforts are almost certain to intensify. India, besides creating a diplomatic counter-narrative, is preparing to fight the legal battle, if it becomes necessary. It is not that India does not have a legal case, and it is confident that it can defend its decision to put the Treaty in abeyance.

Road ahead for India

India’s main focus is on expeditious completion of the projects that will allow it to make full use of its rights on the three western rivers — Indus, Jhelum and Chenab — allocated to Pakistan under the Treaty. The Treaty’s provisions allow India to make limited use of these waters, but this has not been possible because of Pakistan’s repeated objections to anything India tries to build on

• LEGAL

Distinguished jurist: The unused route to appoint an SC judge

Amaal Sheikh
New Delhi, September 1

DECADES AFTER the Constitution came into force, one route to becoming a Supreme Court judge has never been taken. At a convocation address on August 30, Supreme Court judge Justice Ujjal Bhuyan pointed to Article 124(3), which allows the appointment of a “distinguished jurist” as a Supreme Court judge, and called it an “unused mandate” of the Constitution that “needs our serious attention.” He said that having a distinguished jurist on the bench would “diversify the Bench” and that they “would not remain constricted by narrow technicalities thereby being in a stronger position to deal with public law issues.” He said the “participation of... legal academia and scholars would have a defining impact on the judicial functioning of the Supreme Court.”

What the Constitution states

Article 124 sets out how the Supreme Court is constituted. Article 124(3) lists who can be appointed as a judge, i.e., a citizen of

India who has either served as a High Court judge for five years, practised as an advocate for ten years, or “is, in the opinion of the President, a distinguished jurist.” The first two routes are how the court has always been staffed. Most judges have been elevated from the High Courts, while a smaller number of lawyers have been appointed directly from the Bar. The most recent was Justice V Mohana, recommended by the collegium in May 2026 and sworn in the following month. The third category, the appointment of distinguished jurists, has simply never been used. Article 217 lays down the conditions for the appointment of a High Court judge. The 42nd Amendment, enacted during the Emergency, added a provision allowing the appointment of a “distinguished jurist” as a judge of the High Court. However, the provision was eventually repealed by the 44th Constitutional Amendment.

Where the clause came from

The clause was added during the Constituent Assembly debates on May 24, 1949, after H V Kamath moved an amendment

Appointing a judge: 3 ways

• The Constitution sets out who can be made a SC judge: a citizen of India who has either served as a HC judge for 5 years; practised as an advocate for ten years; or ‘is, in the opinion of the President, a distinguished jurist’.

• The first two routes are how the court has always been staffed. The third route has never been used.

saying the pool of candidates shouldn’t be “necessarily confined to Judges or Advocates.” He said that India needed a way to bring in “men or for that matter, women who are possessed of outstanding legal and juristic learning,” even if they had never practised law. He pointed out that judges of the International Court of Justice at The Hague are chosen on similar terms. B R Ambedkar didn’t object to the idea itself. His only hesitation was over the word “distinguished”, and he wondered whether “eminent” would be a better fit. He, however, left the final call to the Drafting Committee. The amendment eventually went through.

Who qualifies & why no one has

Justice Bhuyan offered two possible explanations for why the clause remains unused. “The first is that earlier in the view of the central government and thereafter of the collegium, there is not enough depth in the Indian academia to be considered for elevation as a judge of the Supreme Court. The second is that both the central government and the collegium have not seriously explored this provision thus far,” he said.

A “distinguished jurist” is generally understood to be anyone engaged in serious work in the practice, teaching or research of law, including those who do not require courtroom experience to fit the description. But this interpretation runs into a separate problem in India, where the Bar Council rules generally prevent full-time law teachers from practising law. A further complication is the process of Supreme Court appointments itself. Appointments today are initiated through the collegium system, meaning that a jurist would first have to be recommended by the Supreme Court collegium before the appointment goes to the government. In an interview in 2015 with *LiveLaw*, Upendra Baxi recalled being addressed as “Judge Baxi” by a professor, who had been told by Justice P N Bhagwati that Baxi would be made a judge within a few months. That appointment never materialised. Addressing the matter, Baxi said that “the Presidents of India have been looking with a telescope and have not found any jurist worth appointing as a Supreme Court Judge” and thus called it “a dead issue.”

• NEPAL DISASTER

Why risk-monitoring in the Himalayas is like looking for ‘needles in haystacks’



EXPERT EXPLAINS
AUSTIN LORD

SENIOR FELLOW AT STIMSON CENTER

THE FLOODS in Nepal have raised fresh questions about how well the Himalayas are prepared for rapidly evolving and cascading climatic and geological hazards. **Austin Lord**, a Senior Fellow with the Energy, Water and Sustainability Program at the US-based non-profit thinktank Stimson Center, has been closely examining the region’s evolving hazard landscape. In an interview with **Nikhil Ghanekar**, Lord discusses the sequence of events, the risk of ‘hazard constellations’, and the lessons the disaster holds for Nepal and the wider Himalayas. Edited excerpts:

What was the trigger and sequence of the Nepal flood?

The present consensus is that the initial trigger was a glacial detachment that included bedrock on the northern slopes of Langtang Lirung, a 7,000-plus-metre peak in the Langtang range. The exact triggering process is not entirely understood. That could be related to climate-related risks or gradual shifts at the site. Preliminary analysis indicates there may have been some minor movement of the glacial mass in the weeks or months before the event, followed by a tipping point. Once it failed, it swept down through a gully toward the Lhende River, which reaches the Chinese border. The source area was around 5,200 metres, so the flow descended a couple of thousand metres. It deposited a mixture of ice, rock and sediment, creating a temporary natural dam that blocked the river. There is still debate about how much water came from the glacier itself, from the melting of entrained ice, and from water that accumulated behind the landslide dam. The dam failed and sent a major pulse

of water downstream. The event reached the China border in roughly nine minutes. Footage from the Gyirong border facility shows a massive dark wave containing not just water but a large volume of material. The border facility was at a confluence with another tributary, the Gyirong River. The flow then continued downstream. Within seconds of hitting the Chinese facility, it was already moving back into Nepal. There was no realistic opportunity for people at the facility to warn communities downstream; many of those who could have generated an alert were themselves swept away. The flow then destroyed dams and hydropower projects downstream, recruited additional sediment, and swept through villages along the river corridor. The event continued into Nuwakot district and affected larger market towns in the floodplain. These affected areas are well beyond the 100-year or 500-year floodplain. This was a thousand-year-plus flood event, with significant impacts extending more than 100 kilometres downstream. The flood pulse also registered at

the India-Nepal border. The larger issue is the increasing frequency and intensity of cascading hazard chains. We have seen this in Chamoli; Sikkim, with the South Lhonak GLOF (glacial lake outburst flood); and in Nepal with the Melamchi disaster. Climate risks are interacting with and amplifying other disaster risks. These events are becoming more frequent and more intense.

Was the failed glacier identified as a vulnerable site?

Several places around Nepal have been identified as high-risk areas for glacial detachment and surges. There are glaciers immediately on the other side of Langtang Lirung that are high-priority research sites. But this particular location had no red flags. Even now, we are examining whether changes could have been detected in the days leading up to the event, but that would still require knowing where to look. Monitoring every glacier and every mountainside that could collapse is like looking for needles in haystacks. You need some signal to separate from the noise.

That is why remote sensing and satellite-based analysis are important, but different satellite tools answer different questions, and you have to know where to look. To know where to look, it’s important to engage local communities. Of over a dozen extreme events in the Himalayas over 10 years, almost all came from unknown places, except the South Lhonak GLOF which was a known risk. We are beginning to identify patterns, but there is no training dataset from the Alps or Norway that can simply be transferred to the Himalayas. The Himalayas have their own context and significant data scarcity and data sparsity.

What is the broader lesson for India, Nepal and the Himalayas?

The kind of mapping exercise undertaken by India’s Home Ministry and space agencies (to monitor glacial lakes and hazards) is an absolute necessity. It provides a baseline. Nepal does not have the same level of resources, and although some mapping has been done, it is not as comprehensive. Once you have those maps, you can

begin hazard zoning and modelling. But the key is monitoring. Remote sensing and satellite imagery are one part of the triangle. The second is fixed station networks — hydromet and seismic stations. The third is localised monitoring. You need to engage local governments, disaster managers and Community Disaster Management Committees. They can collect local data, report landslides and monitor impacts after storms. You also need people who are immersed in these environments. Yak herders and fishermen can notice changes in rivers, glaciers and glacial lakes. Oral histories with elders can reveal smaller avalanches, glacial-lake floods and other events that science has not recorded, helping identify potential hotspots. When you combine the station network, remote sensing and localised monitoring, you have a better chance of detecting changes and distinguishing the signal from the noise that tells you where to look.

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Innovative acquisitions

Recent TCS deal highlights changing dynamics

The latest deal announced by the country’s largest software company, Tata Consultancy Services (TCS), has underscored the need for tech firms to innovate and explore unconventional acquisitions. Last week, the company announced a five-year strategic partnership with German auto major Porsche, as well as an agreement to buy the luxury carmaker’s information-technology (IT) and management consulting subsidiary MHP Management-und IT-Beratung GmbH. TCS’ simultaneous deals with Porsche and MHP are being valued at around \$1.5 billion and \$373 million, respectively. Significantly, in sync with the times, the Porsche partnership will focus on industrialising artificial intelligence (AI) across operations, among other functions. With traditional mergers and acquisitions in the IT sector drying up in a fast-changing tech landscape, bundled deals may be the way to go. Besides TCS, some other IT companies are also opting for deals that package acquisitions and cutting-edge service-related agreements in parallel. Among others, Wipro signed a multi-year digital transformation deal earlier this year with Singapore-headquartered food and agriculture major Olam Group for an estimated value of \$1 billion, while acquiring its IT subsidiary Mindsprint for \$375 million.

This strategic route will enable tech companies to stay relevant in an AI-engulfed world. Several AI leaders, historians and tech executives have highlighted the advantages and risks of AI power in their own way. Elon Musk, founder and chief executive officer (CEO) of Tesla and SpaceX, has projected that AI would overshadow human capabilities within five years. Microsoft cofounder Bill Gates has argued that this unprecedented technology (AI) demands an unprecedented global response, adding that AI will either be the greatest equaliser ever invented or the worst source of injustice. Nvidia CEO Jensen Huang has opposed Mr Gates’ proposal of taxing robots, stating that AI may disrupt some jobs but will be a net job creator. Historian Yuval Noah Harari has pointed out that the AI battle is about trust shifting from humans to algorithms at a superfast pace. According to Mr Harari, this is the time to ask questions and that it might be too late by 2028 and certainly too late by 2036.

Against this disruptive backdrop, Tata Sons and TCS Chairman N Chandrasekaran recently referred to AI as a foundational and civilisational shift. Comparing AI’s infrastructural significance to landmark inventions like steam engine and the internet, Mr Chandrasekaran pointed out that AI was an opportunity that would unlock demand. At the same time, he told shareholders at the TCS annual general meeting in June that the company would have as many AI agents as human workers within the next few years, implying that traditional hiring would moderate. Even as AI has begun impacting the IT sector, including job losses at big tech, especially at entry levels, recent studies have shown the creation of specific AI roles in many companies. In the April-June quarter of FY27, TCS reported a net addition of 9,279 employees, with the headcount touching 593,798. This is the biggest quarterly net addition for the company in three years. The development follows the large-scale downsizing in the company last year, indicating possible redeployment as well as a demand for AI-related jobs.

At a time when the world is in the midst of a paradigm shift, imaginative pacts such as the one signed between TCS and Porsche may offer a template for the IT industry in long-term value creation and strengthening the deal pipeline.

Himalayan blunders

Unchecked human activity is amplifying disasters

The world received its loudest warnings about global warming these past few summers with wildfires in the United States (US), record-breaking heat in Europe, and now the tragedy of a yet another glacial lake outburst flood (GLOF) on the Nepal-Tibet border. The torrent of glacial debris that cascaded into the Bhotekoshi and Trishuli rivers resulted in over 1,000 deaths and more than 4,000 missing — among them Indians on the Kailash-Mansarovar pilgrimage and at an immigration centre located in the path of the flash flood. Nearly 12 per cent of Nepal’s hydroelectric generation has been incapacitated. GLOF-related tragedies have become increasingly frequent in the Himalayas, demanding a structured and cooperative response from the countries most impacted by this phenomenon — India, Nepal, Bhutan, China and Pakistan.

GLOFs are formed by a combination of the long-term forces of climate change interacting with local weather phenomena. Himalayan glaciers are melting at an accelerated pace, creating lakes in the friable rocks of these young fold mountains. As more meltwater fills these unstable lakes and monsoon rain adds to the pressures, these water bodies burst their banks and hurtle down the mountains at warp speed, carrying a deadly cargo of water, mud, ice, boulders and rocks. The fact that the Himalayas are also a zone of high seismic activity adds to the instability and unpredictability of this phenomenon. GLOFs of varying degrees of intensity have caused death and destruction in 2025, also along the Bhotekoshi river and in Dharali in Uttarakhand; in 2023 in Sikkim, destroying an ill-planned dam along the Teesta river; and in 2021 along the Rishi Ganga, badly damaging two hydropower projects. More than a decade before this, the 2013 flash floods in Kedarnath, where more than 5,000 people died at the height of the Char Dham pilgrimage season, offered a salutary warning of the dangers of over-construction and over-tourism in this fragile mountain terrain. Roads and tunnels unscientifically slashed into rock faces without regard for durability, hydropower projects located in steep upper river valleys in unsustainable terrain, and the proliferation of guest houses, hotels and *dhabas* on riverbanks to serve expanding numbers of religious pilgrims who can access these high-altitude temples with greater ease have amplified the human toll from these climate events. But lessons from these disasters are yet to be assimilated by local or federal governing establishments.

The Himalayas and the rivers that originate from it are critical for the livelihoods of millions of people within the Tibetan-South Asia geographies. While accurately predicting GLOF events is still extremely difficult, satellite and computer modelling can track changes in size and offer an early warning system of sorts. But the international collaboration that could make this system genuinely effective remains elusive. The Nepal-based International Centre for Integrated Mountain Development, which attempts to collate and share data from countries across the Hindu Kush-Himalayan system, is hampered by political tensions among member nations that make meaningful data-sharing challenging. India, with 11 states and two Union Territories bordering the Himalayas, remains uniquely vulnerable to the region’s changing ecology. Developing robust monitoring capabilities here and making hard decisions to limit development and tourism infrastructure would be useful first steps in saving its people from the worst consequences of climate change.

The silent takeover of India’s health care



NEHA BHATT

The shifting nature of ownership within India’s health care ecosystem — effectively a takeover by big finance, as it were — has had a profound impact that extends far beyond what meets the eye. Though this development has brought immense benefits, it is clear that they are not universally shared, straying from independent India’s broader vision to ensure that health remains a right, not a privilege.

In *The Silent Syndicate*, author and public policy expert Ameer Shahul delivers a timely, urgent investigation into how global financial interests are extending their reach deep into private health care, reshaping it with massive

cash injections. It follows his recent work, *Vaccine Nation*, another meticulously researched book tracing India’s vaccine and immunisation history since colonial times.

Excavating financial data, personal stories and ground-level reporting, Mr Shahul builds a compelling narrative of how this “syndicate” operates across all corners and poses great risks, with eye-opening financial detailing, policy shifts and stories of the good doctors and trusted hospitals undone by the pursuit of financial gain (with notable exceptions).

He begins with the telling transformation of Kimshealth in Thiruvananthapuram, once a “symbol of altruistic ambition”. It mirrors a wider trend across similar institutions originally established by visionary doctors to deliver affordable care, swallowed up by domestic and global corporate greed. Following a layered \$1 billion deal with Blackstone, Kimshealth now functions like a “fortress under foreign command, its corridors

humming with transnational energy,” the author observes.

As cardiologist and public health expert K Srinath Reddy writes of the book: “It shows how global players cynically view the healthcare needs of Indians as a ready-made market from which to extract enormous profits with little regulatory restraint.”

The book traces the origins of the acquisitions, with subtle shifts from the 1980s accelerating through the economic liberalisation of the 1990s. Structural adjustment programmes encouraged by the World Bank and the International Monetary Fund opened doors to private capital. With abysmal public spending on health, the role of private enterprise rose dramatically, bringing with it the first wave of corporatised, efficiently-run hospitals flush with innovation.

For the middle class that gained from this expansion, it is natural to view this shift as necessary progress. But Mr Shahul offers a stark counter-narrative: As health care began to be

seen as a major economic growth driver, foreign capital swooped in, targeting an expanding consumer market, with little interest in public health priorities and human rights. The author notes how private equity swept major players into its fold, from hospital networks such as Apollo, Fortis, Max, Manipal, and Medanta to diagnostic giants like SRL and Dr Lal PathLabs. The book should also be read as a cautionary tale for the education sector, where private equity is steadily making its way into schools.

“Healthcare was now an asset class. For PEs like Blackstone, India’s healthcare promised the one thing global investors craved: The predictability of illness and thus the certainty of cash flow,” writes Mr Shahul as he poses troubling questions like: Who truly owns India’s health care?

ILLUSTRATION: BINAY SINHA



Data centres aren’t India’s water villain

India’s water crisis has been created by decades of treating water as free. Prosecuting the newest user alone would be a policy failure

The moment data-centre water use starts appearing in cartoons in financial dailies and think pieces in business magazines, and President Donald Trump begins staking political capital on one of the most contentious issues in the United States, one knows that an engineering footnote has become a public policy dispute.

Artificial intelligence, cloud computing and hyperscale server farms are now routinely painted as villains in a country’s water story. A 100Mw data centre, critics warn, can draw roughly 2 million litres of water a day in conventional cooling conditions. Subsidising such facilities for a modest number of direct local jobs is increasingly described not as modern infrastructure-building, but as ecological asset-stripping.

It is a neat, emotionally satisfying argument, yet it is also an incomplete one. Data centres do deserve scrutiny. They must disclose water withdrawals, avoid potable freshwater wherever alternatives exist, pay fairly for local resources, and be held to strict recycling and discharge norms. But singling them out as the main cause of India’s water problem is to mistake visibility for scale.

The larger question is not whether data centres use water. They do. The question is whether India has a serious framework for comparing water use across sectors, locations and economic outcomes. Water, the country’s most valuable natural resource, is still treated as a cheap input for agriculture, industry and urban expansion rather than as a scarce economic asset that must be priced, measured, and governed.

Consider the arithmetic of proportion. Agriculture accounts for around 90 per cent of India’s freshwater

withdrawals, by most standard estimates. Within that, India continues to encourage crops and trade patterns that export enormous quantities of “virtual water” — the hidden water embedded in rice, sugar, cotton, livestock products and other commodities.

Ashok Gulati and other agricultural economists have long warned of this distortion. India’s rice exports often exceed 20 million tonnes a year. Depending on assumptions about water intensity, that can translate into tens of billions of cubic metres of embedded water leaving the country annually, much of it drawn from the stressed groundwater belts of Punjab, Haryana and parts of Telangana. Sugarcane adds another layer of irony. The push for ethanol blending may reduce some fossil-fuel dependence, but when the feedstock is water-intensive cane or grain, the environmental burden is partly shifted from oil imports to groundwater depletion.

This is the real paradox. As a nation we continue to subsidise the draining of our own water tables through free or under-priced power, open-ended procurement signals, and export incentives that do not account for embedded water. Rice, sugar, cotton, textiles, leather, mining, metals, steel, chemicals, pulp and paper are all part of the same water economy. Some withdraw water for irrigation. Others use it for washing, cooling, dilution, slurry transport, boilers, bleaching or effluent treatment. Yet public outrage is far more likely to gather around a data-centre campus than around the slower, dispersed and politically familiar overuse of water elsewhere.

Of course, data centres’ local footprint can be real, especially if they draw on municipal freshwater, pri-



SACHCHIDANAND SHUKLA

The paradox of a ‘women-friendly’ sector

India’s livestock sector is widely regarded as one of the most dynamic drivers of rural transformation. The sector now contributes nearly one-third of agricultural gross value added, while India has emerged as the world’s largest milk producer, accounting for almost one-fourth of global milk output. Milk production has increased sharply — from about 147 million tonnes in 2014-15 to more than 239 million tonnes in 2023-24 — alongside rapid expansion in dairy, poultry, and allied value chains.

For millions of smallholders and land-poor households, livestock has become an important source of income diversification, livelihood resilience, and risk management. Because livestock activities are largely home-based and compatible with domestic responsibilities, the sector is also increasingly portrayed as a pathway to women’s economic empowerment.

Yet beneath this success story lies a more complex and less visible reality. Our analysis of nationally representative Time Use Survey data for 2019 and 2024 reveals a striking paradox in India’s livestock transition: Women’s participation in livestock activities is increasing, but the gains from commercialisation remain uneven and often exclusionary. Between 2019 and 2024, women’s participation in livestock activities in rural India increased from 11 per cent to 15 per cent, with especially sharp growth in market-oriented livestock work across several states and agro-ecological regions.

However, this expanding engagement has not been accompanied by any meaningful reduction in unpaid domestic responsibilities. Rural women continue to spend nearly 286 minutes per day on household chores and caregiving — almost seven times more than men. Rather than redistributing labour within households, commercialisation is often adding to women’s existing responsibilities, creating a “double burden” in which market-oriented work is added to unpaid care work.

These findings challenge the common assumption that rising female participation in agriculture automatically signals empowerment. Livestock has long been viewed as a “women-friendly” sector because it enables women to combine productive work with household responsibilities. Women feed animals, collect fodder, clean sheds, process milk, and care for small ruminants, making them central to livestock production systems across rural India.

Yet the structure of livestock value chains remains deeply gendered. While women contribute a substantial share of labour, men continue to dominate higher-value activities such as marketing, asset ownership, access to credit, and engagement with extension systems. Women contribute labour, but men frequently retain control over the income generated through commercialisation.

This is the central contradiction of India’s rural transformation: Women are entering markets without exiting unpaid work. The problem, therefore, is not simply one of labour burden, but also of recognition, control, and access to economic returns. In this context, the growing participation of women in agriculture does not necessarily represent empowerment. In many regions, it reflects what scholars describe as “distress feminisation,” where women absorb additional labour because of male migration, shrinking farm profitability, and limited access to non-farm employment opportunities.

Our analysis also reveals important regional disparities. Women’s participation in livestock is particularly high in arid, rainfed, and hill regions, where livelihood options are limited and livestock often functions as a coping mechanism. States such as Rajasthan, Bihar, Madhya Pradesh, and Jharkhand have witnessed especially sharp increases in women’s involvement in both own-use and market-oriented livestock activities. Yet much of this work remains informal, unpaid, and weakly connected to market power or income control.

Education emerges as another critical factor. Higher educational attainment is strongly associated with lower participation in livestock activities, particularly for women. This suggests that livestock continues to function as a fallback occupation for women with limited access to better employment opportunities. At the same time, livestock remains one of the few sectors where women can participate relatively easily, especially in contexts where mobility constraints and social norms restrict access to non-farm work. The challenge, therefore, is not to reduce women’s participation, but to improve the quality, productivity, and returns from that participation.

vate tankers, or groundwater in already stressed urban regions. Their power demand can also increase indirect water use through the electricity system. But the solution is regulation, not reflexive demonisation.

Indeed, data centres may be among the easier parts of the water problem to discipline. Modern facilities are moving towards closed-loop liquid cooling, air-cooled chillers, seawater cooling in coastal locations and reclaimed municipal wastewater. These systems are not costless; they need energy, infrastructure and thorough local safeguards. But they are measurable and auditable. A server farm can be required to report water usage effectiveness, source only non-potable water, use recycled supply, meet zero-liquid-discharge standards and publish watershed-level impact data.

The right test, therefore, is economic productivity per litre. How much value, employment, strategic capability and ecological damage does each litre generate across sectors and places? Ronald Coase’s insight on social cost remains useful here. Externalities persist not because one actor is uniquely wicked, but because rights, prices and liabilities are poorly defined. Groundwater is extracted as if it were a private entitlement, though its depletion is a public cost. Electricity subsidies hide the cost of pumping. Industrial water is often priced below scarcity value. Urban wastewater remains under-treated even as industries queue up for fresh supply. In such a system, blaming one visible sector may produce satisfaction, but not conservation.

India needs a water policy that is boring in design but radical in effect: Measure, price, disclose and recycle. First, all large users, including agriculture and certainly industrial clusters, mines, steel plants, chemical units, paper mills, textile processors and data centres, should face transparent water accounting.

Second, high-stress basins should carry stricter permitting rules, with recycled water made mandatory for new industrial loads. Third, trade and subsidy policy must incorporate a virtual-water lens. It makes little sense to celebrate exports that earn thin margins while silently liquidating groundwater capital.

Fourth, farm policy must move away from rewarding water intensity. Minimum support price signals, power subsidies and procurement systems should encourage crop choices aligned with local water endowments. Millets, pulses and oilseeds cannot remain rhetorical favourites while paddy and cane continue to enjoy the real incentives. Replacing unmerited free power for borewells with better-targeted income support would be politically difficult, but it is more honest than pretending that data-centre restrictions will rescue Punjab’s aquifers.

The hard truth is that India’s water crisis has been created by decades of treating water as free and depletion as someone else’s problem. Data centres are part of the new demand curve and must be governed accordingly. But the real policy failure would be to prosecute the newest user while protecting the oldest distortions.

The writer is group chief economist, L&T. The views are personal

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Doing so requires moving beyond token references to “women’s empowerment” in agricultural policy. First, women need stronger ownership rights over livestock assets and direct access to institutional credit. Second, extension systems, producer organisations, and dairy cooperatives must become genuinely gender-responsive rather than continuing to treat male farmers as the default participants.

Third, labour-saving investments — including fodder systems, improved water access, and mechanised feeding technologies — are essential to reduce women’s time poverty. Finally, childcare services and rural care infrastructure must become integral components of agricultural and rural development policy.

The Time Use Survey offers a powerful reminder that development cannot be measured solely through rising participation rates or market integration. Who works, for how long, under what conditions, and with what control over returns are equally important questions. India’s livestock revolution will remain incomplete if it continues to rely on invisible and unpaid female labour.

Unless commercialisation is accompanied by redistribution of care responsibilities, improved market access, and greater control over productive assets, women’s expanding role in livestock may deepen existing inequalities rather than transform them. The real question is not whether women are participating more in livestock — they already are. The real question is whether India’s rural transformation is finally prepared to value their time, labour, and agency.

The writer is senior research fellow, International Food Policy Research Institute-South Asia. The views are personal



OUR VIEW



Apple has cash: it needs a big leap into the AI pie

Its robust finances and mass-market presence grant Apple's new CEO John Ternus plenty of strategic space to get its act together on AI. The company's innovative core faces a big test

John Ternus, who has taken charge of Apple Inc as CEO, inherits a mixed bag of fortune. The company, worth some \$4.6 trillion, has more than 2.5 billion active devices in people's hands and an enviable cash pile, but is widely seen as an artificial intelligence (AI) laggard. The iPhone marketer was late to Generative AI, has yet to wow users with Agentic AI, and earned eyerolls with its first attempt at AI-run Siri assistance. For its AI services, it mostly relies on Google's Gemini. Apple Intelligence, its own version of this technology marvel, has been thinking different. While Microsoft, Meta, Alphabet and Amazon invest big capital in data centres and AI infrastructure, a capex race that some investors fear has overheated, the *Financial Times* estimates that only about \$51 billion of Apple's \$383 billion in assets are fixed. This levity sets it apart from the balance sheets of other Big Tech majors.

Apple's financial heft offers Ternus plenty of space to manoeuvre. It generated \$109.4 billion in revenue in its June quarter, up 16% year-on-year. Gross margins have hovered around 46-50% over the past year, while its net cash is placed above \$62 billion. This gives investors the comfort that Apple can fund its AI game without quick returns from this hot frontier of technology. It has begun filling AI gaps. It snapped up Canadian AI company DarwinAI, which rejigged neural networks for model-use efficiency. It bought French startup Datakalab, a specialist in on-device AI and computer vision. This year, it paid nearly \$2 billion for Israeli AI startup Q.ai, even as it explored acquisitions of AI-chip firms for its server processors. Apple's gadget wins have stemmed from its mastery of design and user

interfaces. Co-founder Steve Jobs sought novel fusions of hardware and software. Tim Cook gave the business an industrial boost, turning its supply chain, custom silicon and installed base into a mega profit spinner. While Cook will stay on as executive chairman, Ternus is likely to reshape the product portfolio.

In terms of market addressal, Apple has an edge granted by access to iPhone users, among others. Instead of chasing OpenAI or Google, it can push intelligence deeper into its range of devices. Its new Siri AI hints of it. Q.ai's tech could go into AirPods or Vision Pro. On the flip side, the smartphone-upgrade cycle has grown weary and the company faces global antitrust scrutiny for what it charges apps in need of market access, even as reliance on others for AI would risk its gadgets losing appeal should a wave of AI-gizmo rivalry arise. Its commitment to privacy is seen to constrain its speed in this race, although its launch of agentic tools in Xcode gave it a bump-up in developer esteem. Last but not least, if its bet on custom chips and edge models fails to deliver truly transformative AI, Apple could find itself selling pricey hardware in a market defined by cloud-based intelligence. From India's point of view, with about a quarter of its iPhones made in factories here, we need a larger bite of its global value chain. From Ternus's perspective, Apple must get its outlays right. It has lifted its R&D spend to a bit over 10% of revenue. As an engineer who oversaw the success of its A- and M-series of custom processors, Ternus need not make a "dent in the universe," but must still show investors how Apple's new AI chips, products and services can churn out profits without letting the capital discipline slacken that has made Apple so valuable.

GUEST VIEW

India Inc is on a growth-buying spree with an upsurge of M&As

Integration is where real value gets created when companies seek acquisitions to scale up speedily



SUBODH RAI
is managing director, Crisil Ratings.

For much of corporate India's recent history, mergers and acquisitions (M&As) have been viewed as an occasional growth lever, deployed selectively when opportunities aligned. That is changing. Increasingly, M&As are being used as a core strategic tool to pursue scale, capabilities and market leadership in an environment where speed can be as important as strategy. Annual M&A volumes have more than doubled since 2016-17, reflecting a growing conviction among corporate leaders that these can speed up growth, provide entry to new markets and acquire capabilities that would take years to build organically. In many cases, an acquisition is a competitive necessity more than an option.

What makes the current cycle interesting is the strength of the financial foundation underpinning it. Corporate balance sheets today are considerably healthier than they were a decade ago. Over the years, India Inc has navigated a succession of disruptions, from economic shocks and supply-chain disruptions to geopolitical uncertainty. Yet, rather than getting weakened, many companies have become more resilient.

Revenue growth and profitability have held up through periods of volatility and balance sheets have strengthened materially. The median net debt-to-operating profits ratio for corporates rated by Crisil Ratings declined to about

1.3 times in 2025-26 from 2.4 times in 2016-17. This improvement has created financial flexibility, enabling companies to pursue strategic acquisitions.

At the same time, the approach to organic expansion has become more measured. In an environment shaped by geopolitical complexity and uncertain demand conditions, managements are becoming selective about where and how they allocate capital. This discipline is a sign of maturity.

As a result, Indian companies are increasingly using M&As to complement organic growth strategies. Healthy capacity utilization levels and lower leverage have preserved balance-sheet headroom, allowing businesses to act decisively when opportunities arise.

The motivations vary across sectors. In pharmaceuticals, healthcare, enterprise technology, artificial intelligence and consumer businesses, acquisitions are often about gaining access to technology, talent and intellectual property. In cement and metals, the rationale differs. Acquisitions offer a faster path to capacity expansion, compressing project timelines from several years to as little as one to three years.

Yet, while the strategic logic of a buy-out may be compelling, execution ultimately determines outcomes. A Crisil Ratings analysis of 100 large debt-funded transactions offers an important lesson. Roughly two-thirds of the deals broadly met expectations. Successful acquisitions delivered meaningful scale expansion within one-two years, broadened geographic reach or improved profitability as synergies began to materialize.

The remaining one-third tell a different story. Integration challenges accounted for about half of the underperforming deals, while regulatory delays and cross-border execution complexities were also significant contributors. These experiences reinforce a fundamental reality: announcing an acquisition is often the easiest part of the process. Too often, organizations

assume that a strong strategic rationale alone guarantees success. In reality, value creation depends on what happens after the transaction closes. Disciplined integration, effective change management, timely synergy capture and rigorous oversight of leverage are what separate successful acquirers from those that fall short.

This is especially important from a credit perspective. Encouragingly, acquisitions have generally translated into stable or positive credit outcomes. Around three-fourths of ratings were reaffirmed or upgraded following acquisitions, while a majority of these acquirers reduced leverage on or ahead of plan within two years. The benefits of greater scale, improved diversification and operational synergies often offset the temporary increase in debt associated with their acquisitions.

Where outcomes have been weaker, the key factors were elevated leverage, industry cycles turning unfavourable, growth taking longer to materialize and regulatory hurdles delaying execution. These are risks that can be managed with planning and strong governance.

India's corporate leaders face an important balancing act. M&As will continue to play a critical role in accelerating growth, building competitive advantage and responding to rapidly evolving markets. However, acquisitions cannot become a substitute for investing in core capabilities.

For success, companies should not just pursue inorganic growth, but also strengthen innovation, technology, talent and operational excellence. They must view acquisitions not as an end but as one component of a broader value-creation strategy.

The M&A opportunity for India Inc is significant. But long-term success will depend on how effectively acquisition deals are executed. Disciplined capital allocation, strong integration capabilities and sustained investment in organic strengths will remain the true determinants of durable value creation.

10 YEARS AGO



JUST A THOUGHT

We're here to put a dent in the universe. Otherwise why else even be here?

STEVE JOBS

THEIR VIEW

Why UPI may never be able to outmode the use of cash

MADAN SABNAVIS



is chief economist, Bank of Baroda, and author of 'Corporate Quirks: The Darker Side of the Sun'

India's Unified Payments Interface (UPI) has completed 10 years of operations and has been a phenomenal success. It is now an integral part of our financial ecosystem and used by individuals irrespective of income class for making payments. The system has matured enough for the regulator to talk about making someone pay for its use. A question often asked is this: If even a ₹10 transaction with a hawk can be done using UPI, does it mean regular paper currency is becoming redundant?

Data from the Reserve Bank of India (RBI) throws up interesting trends. The currency in circulation was around ₹42.46 trillion in August and is increasing at a good pace. In fact, 2025-26 recorded an increase of ₹4.38 trillion, the largest after demonetization in 2016. In 2017-18, it increased by almost ₹5 trillion after a decline in 2016-17. During 2020-21, there was an increase of ₹4.14 trillion, the second most, amid covid as people accumulated cash as a safety buffer. On average, we witness an increment of ₹2-3 trillion

every year. Before demonetization too, there were similar increments, implying that people at large still prefer the same level of cash. This also means that from the central bank's perspective, it may not yet be time to slow down the printing of currency notes.

So, what is driving this uptrend in India's demand for paper currency? There are two sets of reasons. The first relates to the advantage of anonymity and the second to a fear of digital transactions.

An anonymity preference is apparent in five use-cases. The first are payments for property transactions. Sellers often insist on cash payments in part for the sale of homes and land. Even developers do it, as they may need to pay cash bribes to get clearances for their projects (land certificates, water and power connections, etc) and fend off local land sharks. Several layers of authorities being involved leads medium and small developers to use speed money to keep their projects on track and reduce cost overruns. While state-wise Real Estate Regulation Authorities have helped make the system more transparent, there are still challenges. The cash component in realty deals can go up to 30-40% if it is a resale or 10-15% in the case of a primary sale. If it is a patch of land, the cash ratio could be even higher.

Second, cash is still used widely for buying gold ornaments. There is a limit of ₹2 lakh for purchases with cash payments. Beyond this level, one needs to provide a PAN number. So, buyers try to avoid leaving an audit trail by making cash purchases. While corporate jewellery retailers follow the rule, a multitude of smaller establishments in the unorganized sector tend to accept large cash payments. Often, the amount is split into multiple bills to accommodate the customer. Otherwise, doing business would be harder.

Third, wads of cash are accumulated by various political parties for use during elections. Large sums are spent on various campaign expenses or given as gifts to voters. While this is illegal, such transactions are hard to track. Given that we have elections in some states or municipalities every year and the cost of wooing the electorate is rising, this demand for currency doesn't flag.

Fourth, cash is often used to settle bills for expensive functions like marriages. This

helps keep such transactions anonymous and avoid tax burdens. In some places, it can yield substantial savings on hotels, halls, banquets and bands. The amounts involved can range from a few lakhs to crores. Further, marriage gifts often involve cash. Ironically, the tracking of credit-card payments made by taxpayers incentivizes the use of cash.

Notably, several small-time vendors have stopped accepting UPI payments and are now insisting on cash to avoid an audit trail. UPI-record revelations of several hawkers having earned large sums by selling foodstuff during the last Kumbh Mela attracted the taxman's interest. These stories have led some users to revert to cash. While the individual amounts would be small in relative terms, taken together, they would amount to a considerable sum.

On the other side, instances of digital fraud have irked people, especially the older generation of folks who are not savvy with technology. The momentum of UPI adoption was anyway weaker among the elderly

and complex app designs are a deterrent as well. However, with online fraud on the rise and India's redressal system still a work-in-progress, many individuals have withdrawn from the digital payments system.

Lastly, the precautionary motive has grown after covid, with people keeping cash at home for emergencies. During the pandemic, there were several instances of hospitals and nursing homes insisting on cash payments for admission amid uncertainty over reimbursements from insurers, given the surge in hospitalization. That experience stoked the habitual holding of cash among Indian households, with some keeping a handy stash upwards of ₹50,000.

Cash is also used by anonymous donors who do not wish to be identified by recipients or their peers. Migrating everyone to digital transactions and away from cash seems almost impossible. The age factor alone would make a compulsory shift unfair. The fact that many commercial practices remain opaque and involve speed money will always make cash a useful tool for expediting processes. And if the state keeps a tighter watch on transactions made by individuals, it may push them to rely even more on paper money to eschew identification.

These are the author's personal views.

There exist too many use-cases of trail-free paper money that digital payments can't supplant



THEIR VIEW

How India's growth record keeps its dream of development alive

Contrary to claims based on miscalculations, India's economic trajectory needs only a slight pick-up to achieve its 2047 target



V. ANANTHA NAGESWARAN
is chief economic advisor, Government of India

On 30 August, *Bloomberg* published a long article ([tinyurl.com/yc5r5hsk](https://www.bloomberglive.com/yc5r5hsk)) arguing that India's ambition to become a developed nation clashes with its growth gap. The argument rests on a comparison that does not hold. It sets a growth requirement, measured in dollars, against India's achieved growth, measured at constant prices. Those are two different quantities. Once they are placed on the same footing, the gap shrinks to a fraction of what the article describes.

Start with India's recent record. The country reported real growth of 7.8% year-on-year in the first quarter of 2026-27. In nominal terms, growth was 10.3%. The reading is consistent with several high-frequency indicators: purchasing managers' indices, GST collections, sales of two-wheelers and passenger vehicles, bank credit and export growth.

India has held annual growth above 7% since the pandemic, which few nations have managed. It has done so while bringing the average inflation rate down and keeping its public finances in order. India's debt-to-GDP ratio has fallen by about 7 percentage points since 2020-21, among the sharpest reductions in the G-20.

Real growth has been harder to come by everywhere since the pandemic. Manufacturing competition has intensified, supply chains have been weaponized and trade restrictions have proliferated. Tariff and non-tariff barriers have been erected, and interest rates have risen. There have been two energy shocks, one in 2022 and another in 2026. The boom in artificial intelligence has been shared by only a handful of nations. For the rest, it has brought uncertainty and steeply higher prices for electronic goods.

It is easier to grow when the global backdrop is benign. It is more creditable to grow when the backdrop is uncertain and at times hostile. India's post-pandemic performance belongs to the second category. In that light, it deserves credit rather than criticism.

Now to the measurement problem at the heart of the *Bloomberg* article. Economic size, for the purpose of international comparison, is denominated in a common currency, usually the US dollar. For any country other than the United States of America, the growth rate of dollar GDP is the sum of its nominal GDP growth and the change in its exchange rate against the dollar.

When institutions such as the International Monetary Fund project future growth, they have to make an assumption about the exchange rate. They are not in the business of forecasting currencies. So they assume that relative purchasing power parity holds. Under that assumption, the rupee depreciates by the difference between



Indian and American inflation if the latter is lower, as it usually is. Dollar GDP growth is thus nominal growth less that difference, which reduces to India's real growth rate plus the US inflation rate.

Take the period from 2000 to 2024. The article says India's GDP grew at 6.3% a year over those years. In real terms, that is right. In dollar terms, India's GDP grew at 8.8% a year. Exchange rates do not always follow inflation differentials. The rupee's performance against the dollar in 2024-25 and 2025-26 is proof of that. The inflation gap narrowed, yet the rupee weakened. Over long stretches, though, currency movements and inflation differentials tend to converge.

The article's own numbers show what the correct comparison looks like. It cites India's per capita income at \$2,813 in 2025 and a 'high-income' threshold of about \$18,000 dollars by 2047. That is a rise of roughly 6.4 times over 22 years, or about 8.8% a year in dollars per head. Add half a percentage point for population growth, and the requirement works out at about 9.3% growth in dollar GDP. That is close to the 9.25% figure quoted in the article, and it is a dollar-denominated requirement. Set beside 6.3%, a constant-price number, the shortfall looks like three percentage points. Measured properly, against the 8.8% dollar growth India actually recorded, the shortfall is about half a percentage point.

The arithmetic ahead does not call for heroic assumptions either. India's GDP stood at \$3.91 tril-

lion in March 2026. If real growth averages about 7% over the coming decade and American inflation averages 3%, dollar GDP will grow at 10% a year. That takes India to just over \$10 trillion by March 2036. Assume the pace then slows to 7% in dollar terms as the base widens. By 2046, GDP would be a shade under \$20 trillion.

The article points to India's net FDI flows, youth employment and its savings and investment rates. These are real constraints that are worth taking seriously. It is worth remembering, though, that India reached 7% real growth while bound by them. They describe headroom rather than a ceiling. As they are addressed, they leave space to do better rather than worse.

There is also a question of what we are measuring. A country's development status is better judged by the quality of its growth and the standard of living it delivers than by a single measure of economic size. Some countries have reached impressive numbers on that measure by borrowing heavily. The bill falls due long after the headlines have moved on.

The global environment over the next 20 years will be harder for India than it was for the countries that moved from the third world to the first after World War II. India has its task cut out.

That is a fair thing to say. It is not fair to say that India has already failed or has little chance of success. That's a preconception masquerading as a forecast.

These are the author's personal views.

MINT CURATOR

AI secrecy mustn't leave us in the dark about its real impact

Its closet use could spring surprises if there's no way to research it



CATHERINE THORBECKE
is a Bloomberg Opinion columnist covering Asia tech.



The AI industry must let others analyse this technology's usage patterns. ISTOCKPHOTO

Do you have any artificial intelligence (AI) secrets? Maybe the better question is: Would it concern you if your most intimate chatbot queries were shared with your family, colleagues or bosses?

For all the hype, AI still carries a stigma. I have been tracking the mounting backlash for a while. It has become deeply uncool to admit that you used AI to help you with your art, not to mention that it will be judged more harshly. And trust in Big Tech leaders, often for valid reasons, is abysmal. Bashing AI on the internet gets a lot more applause than defending it. So perhaps it should not be surprising that a don't-ask-don't-tell economy now seems to be driving the next tech revolution. That should make us all wary of what happens in the dark.

A global KPMG-University of Melbourne study last year found that 57% of employees across 47 countries admitted that they have used AI in non-transparent ways, including presenting machine-generated content as their own or avoiding revealing when they used the technology to complete work tasks. The same report found that rates of non-transparency among students rose to roughly two-thirds and I can't imagine how that could be over-reported. A survey last November in Japan, where adoption remains relatively low, found that 59% of young professionals never or almost never disclose AI assistance when submitting work.

Part of the reason for this secrecy is that even as business leaders encourage adoption, research shows that it's still ostracized in the workplace. More Americans now talk openly about their AI use with managers and colleagues, a June study from Atlassian found, yet doing so carries a "steep penalty." Even when the output itself was identical, participants rated hypothetical peers who disclosed using AI as 10 times "lazier" and were 24 percentage points less likely to recommend them for a high-visibility project. No wonder employees are unlikely to shout their prompts from the rooftops.

This may also start to explain one of AI's ongoing economic conundrums. Productivity gains not visible in macro data may be accrued by individual workers who have little incentive to reveal them.

But this culture of secrecy can create other risks for businesses, whether it's data leaking to unapproved tools, or a lack of knowledge-sharing across teams. The obvious first step is a clear, accessible policy spelling out when AI can be used and when it must be disclosed. Managers should also encourage prompt-sharing, tips and open conversations about experiments.

There are other consequences to a tech shift unfurling in the shadows that extend well beyond the office. Ask friends how they use chatbots when no one is watching, and the answers might make you gasp. A digital archive project dubbed 'What We Tell AI' is already collecting anonymous confessions via boxes placed in public spaces across the US. They offer a glimpse at the increasingly intimate ways this technology is being embraced. People are using AI to compose birthday messages to relatives or cheat on homework and the *New York Times* Spelling Bee game. Others admit they are in love with ChatGPT, or view it as a best friend. They are not the use-cases that dominate earnings calls.

AI firms publish reports on how people are adopting their products, but some researchers say this is necessarily selective. Firms preparing for major public offerings or defending enormous spending may be incentivized to highlight productivity gains and have less reason to dwell on other uses. That leaves policymakers with an incomplete picture of a technology proliferating rapidly in people's jobs, relationships and private lives, including children's. Regulators hoping to not repeat past mistakes should demand greater transparency from tech companies to let external researchers study how their products are actually being utilized and what effects they are having.

The secrecy also reveals a larger problem for the industry. They are still left hoping that eventually its value will be stronger than the shame of turning to their services. That contradiction is especially stark among youth. Young adults in the US are the most likely to think AI will have a negative effect on society, but they are also the group that says they use chatbots the most, according to a June Pew survey.

The AI revolution is not being televised; it may be too disjointed for that. The message that this technology could put us all out of work, or at worst kill us all, is hard to dismiss as paranoia. But it is not stopping people from asking for dating advice either. That may tell us more about AI's future impact on society than another survey on how many minutes it saves on digital coding tasks. What people are unwilling to admit matters more than what the AI industry is willing to measure. ©BLOOMBERG

MY VIEW | EX MACHINA

India is innovative but we mustn't starve ideas to death

RAHUL MATTHAN



is a partner at Trilegal and the author of 'The Third Way: India's Revolutionary Approach to Data Governance'. His X handle is @matthan.

The Simputer was the first genuinely original computer that India built. As the legal advisor to the project, I was lucky to own one of its first colour units off the production line, and I had hours of fun with its truly novel interface and advanced features.

For those who have never heard of it, the Simputer was a palm-sized touchscreen device designed in Bangalore at the turn of the millennium, years before Apple turned its attention in this direction. In 2001, *Time* magazine called it one of the best and most innovative portable technologies to bridge the digital divide in the developing world, but you will not see any in production today because it died a premature death.

For years, I attributed the demise of the Simputer to unfortunate timing. I convinced myself that we had built a product before the world was ready for it, and that was the reason why it did not take off. With the benefit of hindsight, I think I was being too kind. Not only is the Simputer not the only example of

Indian innovation that hasn't scaled, it's not even the only technology product I have advised that hasn't.

At around the same time, another Indian entrepreneur, Chetan Maini, was developing India's first fully electric car—the Reva. By the late 2000s, with about 3,000-4,000 units on the road across more than 24 countries, the Reva was the most-sold electric vehicle (EV) on the planet—well before Tesla made EVs desirable. This was yet another example of world-class Indian innovation creating a new product category well before global majors. But as good as the Reva was, it too eventually ran out of road and became a footnote in history.

It is frequently suggested that Indians are incapable of coming up with new and innovative products. But we do that all the time—often years in advance of the rest of the world. What we seem to lack is the ability to take those ideas and turn them into commercial successes.

All inventions, no matter how cutting-edge, require investment to make them production-ready. Compaq invested \$50 million in the production of its iPaq series of computers at around the same time as the Simputer, but all the Simputer team needed to take the project across the finish line was

₹50 crore—an amount that it could have secured from a single government order of 50,000 units. That order never came, and despite their best efforts, the team only ended up raising ₹4.5 crore of angel funding and debt.

This is the kind of order that governments around the world have typically issued to support the development of new industrial capabilities in the national interest. The early American semiconductor business survived precisely because the Apollo mission and the Minuteman missile programme bought almost everything that early chip-makers could produce. This not only gave them a guaranteed market needed to support the fledgling industry until economies of scale kicked in, it also allowed them to develop the process knowledge required to manufacture chips at scale. All of which drove costs down to the point where the technology finally made sense for the consumer market.

More recently, it was a series of Nasa con-

tracts that kept SpaceX alive long enough to remake the economics of spaceflight. A committed public buyer can do what no private investor will—absorb the risk of being first.

Are we not willing to make the level of investment required to take innovations to market? After all, what really distinguishes

Apple and Tesla from their peers is their willingness to subsidize their visionary products, often at a loss for several years, until they dominate the market they set out to create. This is how technological prowess is built. Invention is cheap. That is not where market leadership is established. That is only won by those who build the capacity needed to deliver at scale.

At the same time, it is incorrect to say we have never made large technology bets. After all, Reliance Industries invested more than \$20 billion in a nationwide 4G network and then offered the service free for months to win its first 400 million mobile subscribers. This was how Jio came to dominate the telecom space with such speed. Where it counts, we

lack neither the capital nor the courage to make bold technology investments.

Indian capital is not timid. We are more than willing to stake a fortune on new paths to proven outcomes. Yet, as significant as it was, Jio was an audacious wager on distribution rather than invention. We could not find ₹50 crore to bring a device we invented into production, but 15 years later, we invested 3,000 times as much in deploying 4G technology that someone else invented.

A country can only ever become an engine of innovation when three things work in tandem: procurement that gives untested products an early market, capital patient enough to absorb years of losses and the courage to commit to something the world does not yet believe is possible. We have all three, but tend not to deploy them on the unproven. Our capital prefers safe bets to risky bets, and our procurement system is all but built to avoid the audit trail of a failure rather than take a chance on being first.

The next Simputer has already been invented. We need to find it, nurture it and feed it the capital it needs to become everything the Simputer could not be. Whether it thrives or dies, as that ahead-of-the-curve device did, will depend on where we decide to put our money.

The pioneering Simputer's failure holds a lesson on what our innovations need for their market survival



CONTRAPUNTO

You drown not by falling into a river,
but by staying submerged in it

- PAULO COELHO

Current Topics

Himalayas have immense untapped hydel potential, but planners should weigh risks before commissioning dams

Dams have been around for at least 5,000 years, but until 1880s they were built mainly for irrigation, flood prevention, and storing or diverting water. Once electricity came into the picture, though, dams quickly became insanely ambitious. Look at China's Three Gorges Dam, for example, or the \$168bn project being built on Brahmaputra's course through Tibet. It's not a matter of scale alone. Bhakra was massive for its time, but it was set almost at the end of Satluj's mountainous course. Now, large dams are being built higher and higher upstream. That isn't a problem of itself when mountains are sturdy and river flows predictable. But that doesn't sound like the Himalayas.

Last Wednesday's devastating flood in Bhote Koshi river is only the latest reminder of the risks we run while trying to transform the Himalayas with dams, roads, tunnels, etc. Back in 1950s or 1960s, when many blueprints for Himalayan dams were made, global warming was not a concern. You had to worry about cloudbursts, and monsoon floods, and factor those into designs. Now, warming is making slopes and glaciers unstable. The Bhote Koshi flood occurred after a glacier broke. We saw this closer home in 2021, when a similar rock-and-ice avalanche destroyed Uttarakhand's Rishiganga hydel project.

Engineers use decades of rainfall and waterflow data to design dams with adequate safety margins. But how do you factor millions of tonnes of rock and ice coming down in seconds? Scientists say many Himalayan peaks are held together by "permafrost" – like nuts in an ice cream, rocks and mud stick together only till the ground remains frozen. In a warmer world, that can't be taken for granted. The next glacier collapse, and the flood it causes, could be far worse.

That should give pause to planners eyeing the untapped hydel potential of the Himalayas. World's energy demand is growing rapidly. AI and electrification of transport have become the latest drivers, which explains why, say, Alphabet has signed multi-billion-dollar commitments for hydroelectricity in US. India cannot give up hydel either. But we need new assessments and technologies to tackle new risks. Dams and hydel plants take years to build, but can be destroyed in minutes, as we saw at Rishiganga. If higher safety margins push up costs, and make some plans unviable, let's not hesitate to shelve them. Safety of ecosystems, people and projects – in which national resources are invested – should be a major deciding factor.

Ask The Dog

When it comes to animal behaviour, we don't get it.
Animals aren't born to serve us

A dog in Nepal has refused to leave its territory, days after the Aug 26 floods swept away Trishuli Bazaar, among the worst hit, and now a ghost town. Locals who survived, and rescuers, have made their own meaning – it's waiting for 'owners' to return, it doesn't understand, it is a 'mere' dog. Folklore, mythology, urban legends are replete with stories of dog-loyalty – Japan's Hachiko is a celebrated example. Then, there was the Great Dane called Just Nuisance, in naval base Simon's Town, near Cape Town, the only dog enlisted in British Royal Navy. His daytime role was to help in fundraisers; his night job was to ferry back to base inebriated sailors – he misplaced none. Dogs are almost synonyms for loyalty, duty. The one prism – the human prism – they apparently live to serve.

Dogs, horses & cattle, elephants & chimps, to name a few nonhuman species, are all 'things', to be 'owned', without 'personhood'. If some philosophers argued that 'personhood' makes humans superior, where 'personhood' is the ability to reason and evaluate, others argued that if that were the case, very many *humans* would not qualify either. Darwin onwards, science debated, then understood that the human mind isn't in any fundamental way 'superior'. Yet, the human approach has largely remained that nonhumans have no rights. Thus, from inflicting violence on animals to their displacement, human 'needs' take precedence.

What does it say, then, when this dog stays put, without panic, just stoic. Were it to be treated as a person, we may find it has questions. How many will you remove or evacuate the next time a mountain tells you something? Down millennia, because they lived close to humans, dogs have witnessed some of the worst things we've done. Maybe, the dog in Nepal is holding up a mirror.

Mosquito bytes

In the man-machhar conflict, there are no doubts as to who's the winner

Jug Suraiya

It's what's called an asymmetric war. One side has had between 15 million and 20 million years of evolution to develop tactical and strategic skills for use against the adversary. The opposite side has had a mere 2 million years to prepare for battle.

In the man-machhar conflict – which intensifies when the stagnant water of monsoon rains provides a fertile maternity ward for mosquito larvae to develop into winged terrorists carrying dengue and malaria – the numeric odds are heavily stacked against us humans.

The ancestors of the dengue-spreading Aedes mosquito and its cousin, the malaria-spreading Anopheles, came into existence millions of years ago, while the human genus is a new kid on the block, having been around for a measly couple of million years, and us Homo sapiens being babes in the wood at just about 300,000 years.

It's not just the numbers that are against us and in favour of machhars. Dedication, discipline, and single-minded purpose are also on the side of the mosquito.

The mosquito's proboscis, which is the equivalent of a nose, consists of six microscopic needles. Female mosquitoes are the ones that bite, the males being buzzy bodies who leave their opposite gender to get on with the job, which they do with a vengeance.

Ms Mosquito attacks her prey like a dive bomber on steroids. Two of her needles pierce the skin of the victim like sharp blades, another two are serrated like saws to cut through tissue, another needle injects saliva that stops blood clotting, allowing the last, straw-like, needle to drink up like a sailor on a Saturday night bender.

This is the mosquito's core competence, its sole purpose of existence. It's what it has concentrated on doing, and perfecting, for millions of years.

In the meantime, what have we been doing? Footling around inventing – or should that be discovering? – fire, devising the wheel, giving rise to a Kalidas and a Shakespeare, a Tansen and a Beethoven, doing brain surgery and rocket science, and generally getting side-tracked by all manner of distractions and timepasse.

Yes, mosquitoes suck. But as their unabated Operation Sting shows, we've proven to be the real suckers.



secondopinion

Javier Dale



Columnist based in Barcelona

When Wolfgang Amadeus Mozart died on Dec 5, 1791, the news spread like wildfire through Vienna, but not across the rest of the world. Mourning for the musical genius grew like a slow chain reaction, gradually enveloping music lovers in nostalgia. His works remained, of course, and there was always the prospect of his concertos and operas returning to the stage. But it would be Mozart again, not a new Mozart. The despair of those who loved his music must, therefore, have carried a certain resignation: such is life; what can we do? It belonged to an older world, when something that ceased to exist also ceased to be.

Provocative though the comparison may sound, it is a fair one: Messi is to football what Mozart was to music. And his announcement that he is leaving the Argentina national team, is the second step towards the coming nostalgia for the No. 10. The first was his move to MLS, a lesser league where his achievements come with the qualification of weaker opposition. The second is this farewell to Argentina, a World Cup and three finals later, accompanied by the sad sentence that also hung over the farewell to Jorge, his father, and travelling companion through life: "I have doubts about whether I will carry on."

Messi's story with the national team began in Aug 2005, with an early and severe red card, and ended a little more than a month ago with defeat to Spain in New Jersey, followed by a final confrontation in which the Argentine took no part. Knowing now that he was carrying the grief of losing both his father and his national team, gives that match, the last played by Argentina's No. 10 in the Albiceleste shirt, a different meaning. It colours it with tragedy, but also with heroism: the image of a star fighting against time to produce

one final flash of brilliance.

Nostalgia, however, is deceptive. Looking back from 2026, it is easy to imagine that Messi was always a god in Argentina. He was not. His commitment to the country and the national team was questioned because he had lived in Barcelona since the age of 12, even though it would be difficult to find an Argentine anywhere who displayed more 'Argentinity' than Messi. For years, the word "pechofrio" was used against him – literally



'cold-chested', roughly the idea of a choker, someone supposedly lacking heart when it mattered.

His performances for Argentina were measured largely through failure. There was Olympic gold in Beijing in 2008, yes. But Argentina went no further than the quarterfinals at the 2006 and 2010 World Cups, lost the 2007 Copa América final, and went out in the quarterfinals again in 2011. By the time Messi had turned

26 – the age at which Diego Armando Maradona had already lifted a World Cup – his senior international trophy cabinet was empty. Meanwhile, at FC Barcelona, he was producing one extraordinary performance after another, and there were few trophies he did not win.

Then, in 2014, Messi finally carried Argentina to a World Cup final, only for Germany to beat them. In 2016, he led them to another Copa América final, which ended in defeat after the No. 10 missed a decisive penalty in the shootout. The

team, even if few had ever possessed one player of such extraordinary ability. Messi returned to the Albiceleste, but not immediately to trophies. Not until 2021, when Argentina finally won the Copa América, one month before he was forced to leave FC Barcelona.

Perhaps, having lost his Catalan home, Messi found his Argentine home again. Perhaps Argentina, knowing that Messi had lost Barcelona, finally embraced the prodigal son. Because the Copa América triumph of 2021 was followed by the 2022 World Cup, the victory that completed Messi's reconciliation with Argentina. Then came another Copa América in 2024. And then the 2026 World Cup final this July. Messi's persistence, and his longevity despite years of criticism, helped give Argentina the most glorious, sustained period in its football history.

History now teaches us to see Mozart simply as a genius. It spends less time on the details of his struggles. His relationship with power and with the public was often complicated. Under Joseph II, he encountered professional limits and frustrations. In Vienna he initially enjoyed enormous success as both pianist and composer, although demand for his concerts declined towards the end of the 1780s. Some of his operas were received more enthusiastically in Prague than in Vienna. And yet, *The Magic Flute* brought him tremendous popular success shortly before his death. His last breath brought the final consensus: what a genius he was.

Soon, Messi's football will belong to nostalgia and beauty. Now, as he says goodbye to Argentina, it is worth remembering that his career was also contradictory and imperfect. If only to avoid the mistake of believing that we, as human beings, are defined by what happens to us. We are defined, if anything, by how we respond to what happens to us.

Dale is a sports writer for La Vanguardia, a Spanish newspaper

AI Can Create Tragedy Of Commons In Talent Market

If every employer replaces entry-level jobs with automation, who'll be business leaders in 2050? Govt must work with industry to reduce negative consequences of company-level short-termism

Deep N Mukherjee



For millennia, the practice of apprenticeship – novices guided by masters – ensured a supply of future leaders. But as AI takes over entry-level jobs, where will business leaders and specialists of 2050 come from?

Entry-level jobs in many sectors, such as software, financial services, and law, are most impacted by AI. Stanford University's latest AI Index reports that employment among software developers aged 22-25 fell nearly 20% after 2024, even as the headcount of senior professionals grew.

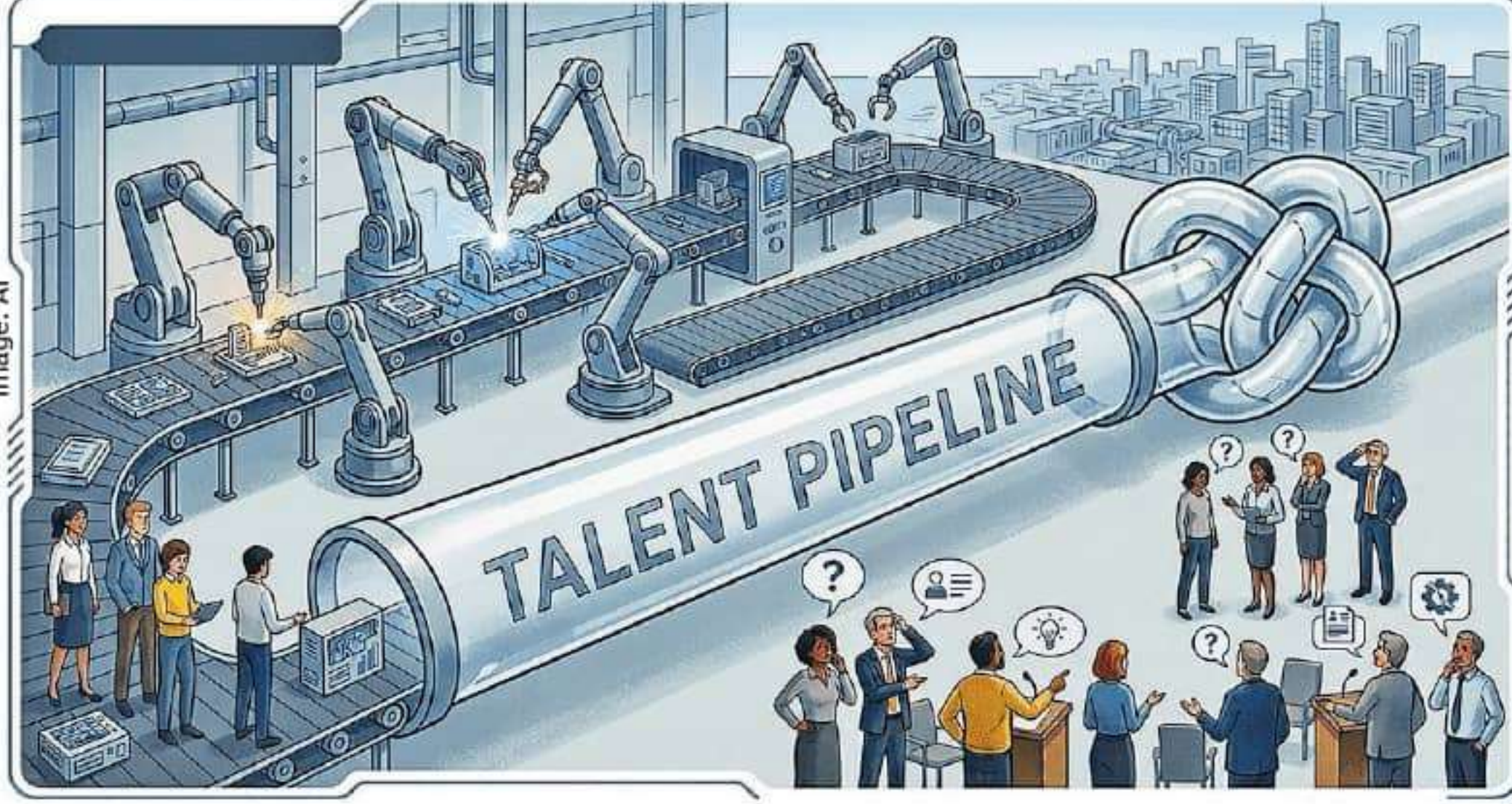
Entry-level jobs are easier to automate because they involve repetitive actions, and simple rule-based decision-making and documentation. But when AI takes over such jobs, at least some novices will never get to be masters, particularly in existing skills.

The consequences go beyond unemployment. IIT considered automation has a history of disrupting not only skill development, but also causing social harm. In 2009, Air France's Flight 447 nosedived into the Atlantic, killing 227 passengers. Investigation found that extensive cockpit automation may have reduced pilots' cognitive skills. They took longer to react to irregular signals, and were less prepared to handle a crisis.

Psychologist Lisanne Bainbridge's 1983 paper, *Ironics of Automation*, was prescient in this respect. Bainbridge explained that when simple tasks are automated, the expert human is supposed to only monitor the process under normal conditions. Just like ChatGPT does not realise when it is hallucinating, automated systems do not know they are failing. A human is expected to jump in to solve the crisis. But identifying failing automation requires strong judgement, which cannot develop without long practice and exposure to challenging situations. Flight 447 led to a revamp of pilot training, with

more intense manual training to counter the adverse impact of cockpit automation.

Societies should be aware that thoughtless AI automation can create a scarcity of talent capable of handling highly complex crisis situations in the future. In *The Perils of Using AI to Replace Entry-Level Jobs* (Edmonson et al. 2025), the authors say, firms that eliminate junior roles today are eating their own talent pipeline. If today's junior cohorts don't get trained by learning from seniors, especially in handling unstructured situations or crises, the future senior cadre hollows out. When the layer of ageing specialists retires, there are no competent successors.



Don't organisations know this? Why do they give in to short-term productivity pressure and automate entry-level jobs? It's because they treat the supply of talent as a given. While they understand that today's entry-level hires will be the senior managers and domain experts of 2046, they hope, somehow, society will supply this talent in future. But when enough organisations stop hiring at the entry level, the ecosystem can't replenish talent. Economists know this as the 'tragedy of the commons'. While it's not any one organisation's immediate headache, it impacts the sustainability of all organisations.

While AI is likely to create new roles that are not in existence today, the threat to the future talent pipeline is real, and society may have just about enough time to act. BCG's AI at Work Survey 2026, covering 14 countries, finds 72% of the 12,000 respondents are regular AI users. Further, 61% of respondents believe at least half their jobs can be performed by AI in the next three years. This survey suggests that automation potential does not equal immediate labour impact. Industries with high automation potential, such as banking and legal services, are yet to see widespread scaled deployment. It is likely to play out over a five-year period. That's the time societies have!

Govt, academia, and industry need to act and invest together to avoid the future talent crunch. Globally, govt efforts to reskill workforce with AI are becoming common. Singapore's Skills Future Initiative supports its citizens with funding options and training. US Department of Labor has launched AI-focused Apprenticeship Programmes, by providing resources, training, and flexible programme pathways to build an AI-ready labour force. Singapore's AI Apprenticeship Programme provides hands-on apprenticeship in AI to young learners.

Given the scale of India, a multipronged approach is required. In addition to apprenticeship programmes, elements of Germany's dual vocational system may be adopted. Graduates may be placed in vocations at organisations, and initiatives focused on AI and deeptech.

Classroom lectures may be reduced to below 50% of the coursework. Business schools may consider operating like medical colleges. Here, industry jobs get outsourced to business schools, and actual delivery of projects to industry is the core curriculum, not a two-month internship.

Fundamental rethinking in training and education mode is required, beyond incremental tweaking.

The writer is a risk management consultant & visiting faculty at IIMs Ahmedabad & Kolkata

Calvin & Hobbes



Harvinder P Singh

Sab Sikhian ko hukam hai, Guru maneyo Granth" – all Sikhs are enjoined to accept the *Granth* as their Guru. These were the parting instructions of Guru Gobind Singh, the last Sikh guru, who codified the Sikh law and ended the line of human gurus. It was the fifth Nanak, Guru Arjan Dev, who had compiled its first version: The *Adi Granth* and installed it in the Golden Temple on Sept 1, 1604. Guru Gobind Singh subsequently added the hymns of the later gurus, establishing it as the final, sovereign and eternal Guru of the Sikhs.

Guru Granth Sahib starts with *Japuji Sahib*, Guru Nanak's first proclamation after attaining Self-realisation. Its opening words, *'Ek Omkar'*, signify

oneness of the universe; rest of the Granth simply elaborates its essence. Alongside hymns of Sikh gurus, it contains teachings of 30 saints from different religions, castes and regions of Bharat. Their teachings are poetically rendered and set to rhythmic music based on 31 distinct *ragas* in this voluminous scripture.

The underlying theme of the Granth is that of universal brotherhood emphasising equality, justice and compassion.

While Guru Nanak proclaimed, *"Na koi Hindu na Mussalman"* – Hindus and Muslims are not dissimilar; Saint Kabir declared: *"Awwal Allah noor uppaya, kudrat ke sab bandey, ek noor tey sabh jag upjayaa, kaun bhaaley ko mandhey"* –

God created the primordial light from which all beings and the universe emerged; so who then is good or bad.

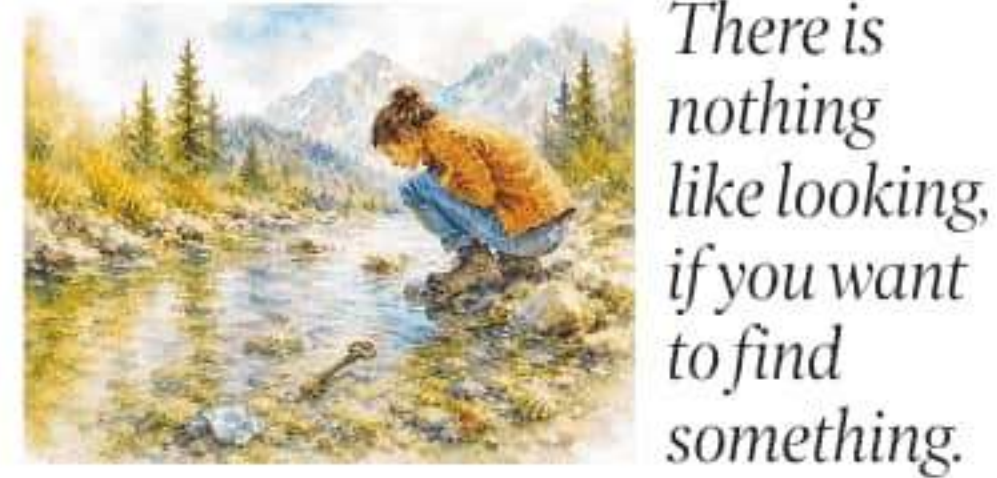
To attain inner peace, the Granth urges us to align with *'Hukam'*, a word derived from Arabic, meaning 'Divine Order'. *Hukamey andar sabko, bahar hukam na koe, Nanak hukamey je bujhe ta haumai kahena koye* – everyone is subject to this law and no one is beyond it, O Nanak, one who has understood this, is freed from ego. Guru Arjan Dev similarly writes: *Nako moorakh, na ko siaana; varte sabh kichh tera bhaanaa* – no one is foolish and no one is wise; everything unfolds according to His will.

Cautioning man against falling prey to perils of *maya*, illusion, Guru Teg



THE SPEAKING TREE

Sacredspace



There is nothing like looking, if you want to find something. You certainly usually find something, if you look, but it is not always quite the something you were after.

JRR Tolkien

Universal Teachings Of Guru Granth Sahib

Bahadur, ninth Nanak, wrote: *Jio supna ar pekhna, aise jag kio jaan; In mein kachu sachu nahin, Nanak bin Bhagwan* – world is like a dream, nothing in it is truly real, O Nanak, except God. Herein lies the importance of gurus, whose grace alone enables one to attain supreme truth and ultimate wisdom leading to *anand*, joy. In words of Guru Ramdas, the fourth guru, *Bani guru, guru hai bani, vich bani amrit saarey* – the Word is the Guru, and the Guru is the Word, within these divine words lies all ambrosial nectar.

Guru Granth Sahib doesn't belong to any faith, as its compositions embody a universal outlook. It offers ethical guidance to all humankind, especially those on a spiritual journey, through relatable language and practical wisdom.

Economy

WEDNESDAY, SEPTEMBER 2, 2026

IN THE NEWS

JET FUEL GETS COSTLIER, LPG PRICES RISE



AVIATION TURBINE fuel (ATF) prices on Tuesday were hiked by 5.46%, while the price of commercial LPG, used by establishments such as hotels and restaurants, was raised by ₹9.50 per 19-kg cylinder, in line with a rise in their international benchmarks.

CNG PRICES RISE BY ₹2 IN MUMBAI AMID CRISIS



Mahanagar Gas Ltd (MGL) has raised the price of compressed natural gas (CNG) by ₹2 per kg in Mumbai and other operating areas, citing a sharp increase in input gas costs following the ongoing crisis in West Asia. The hike follows Indraprastha Gas Ltd (IGL) hiking CNG price in Delhi

ITR filing for AY27 touches record 78 million



A record over 78 million ITRs have been filed for assessment year (AY) 2026-27 till August 31, the income tax department said on Tuesday. Last year, over 73 million income tax returns (ITRs) were filed by September 16, 2025, the extended deadline for filing returns for non-audit cases for AY 2025-26. This also includes over 59 million ITR-1 and ITR-2, which were filed by the due date of July 31.

Petrol, diesel sales soar on erratic monsoon



PETROL AND DIESEL sales by India's three state-run fuel retailers surged in August as erratic monsoon rainfall boosted fuel demand from farmers and motorists, preliminary industry sales data showed on Tuesday. Petrol sales by Indian Oil Corp (IOC), Bharat Petroleum Corp Ltd (BPCL) and Hindustan Petroleum Corp Ltd (HPCL) soared 9.1% to 3.48 million tonnes in August, compared with 3.19 million tonnes in the corresponding period a year ago.

AGENCIES

SOFTER DEMAND WEIGHS ON FACTORY ACTIVITY, FRESH ORDERS & HIRING IN AUGUST

Manufacturing PMI hits 5-yr low

SHUBHAM RANA
New Delhi, September 1

INDIA'S MANUFACTURING SECTOR growth fell to a five-year low in August due to slower demand, with the HSBC India Manufacturing Purchasing Managers' Index (PMI) moderating to 52.8 from 53.5 in July. Softer demand conditions during the month led to weaker increases in buying levels and stocks, as well as a mild decline in employment, S&P Global said. Meanwhile, hikes to selling charges were confined to fewer than 7% of panellists, as cost pressures faded and several companies sought to protect order books, S&P Global said.

The August manufacturing PMI is the lowest since August 2021 and also below the long-run series average of 54.2, S&P Global, which compiles the PMI, said on Tuesday. A PMI reading of more than 50 denotes expansion in activity from the previous month, while a print below 50 indicates contraction.

FACTORY FATIGUE



cates contraction.

Manufacturing PMI fell for the third consecutive month in August, signalling a loss of momentum as growth of both output and new orders slowed to five-year lows, S&P Global said. India's GDP data released Monday showed that the manufacturing sector grew 9.2% in the April-June quarter, the quickest in three quarters.

"Demand trends softened

across two of the three industrial groups tracked by the survey, with consumer goods the exception. Overall, new business increased at a marked rate but one that was the slowest for five years. Panellists attributed the weaker upturn to challenging market conditions and subdued appetite for some products," S&P Global said.

The rise in exports moderated from July but manufac-

■ PMI declined for the third straight month as output and new orders growth hit five-year lows

■ Input buying growth hit 62-month low as firms aligned purchases with weaker demand

■ Price pressures eased, with output-charge inflation slowing to its weakest level in 45 months



CAD widens slightly to 0.5% in Q1, reserves shrink by \$8.1 bn

● FCNR inflows to boost capital account in current quarter

SHUBHAM RANA
New Delhi, September 1

INDIA'S CURRENT ACCOUNT deficit (CAD) widened marginally in the April-June quarter (Q1FY27) from a year ago due to higher energy prices and a wider goods trade deficit on the back of the war in West Asia, the Reserve Bank of India (RBI) data released on Tuesday showed.

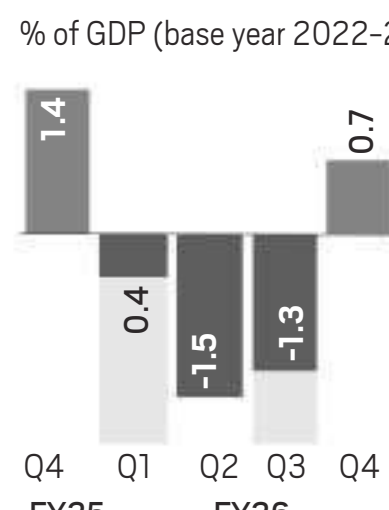
The CAD rose to \$4.2 billion, or 0.5% of GDP, in the June quarter from \$3.4 billion, or 0.4% of GDP, in the year-ago quarter. The current account was in a surplus of \$6.5 billion in the January-March 2026 period.

A rising import bill driven by higher energy prices is likely to broaden India's current account deficit in the current quarter, economists said, but no major risk is expected. "CAD can be higher in Q2 because the trade deficit was higher in July. But we don't see any extreme risk to the full-year CAD number which was expected earlier in the year," said Sakshi Gupta, principal economist at HDFC Bank.

The overall Balance of Pay-

DEFICIT DRIFT

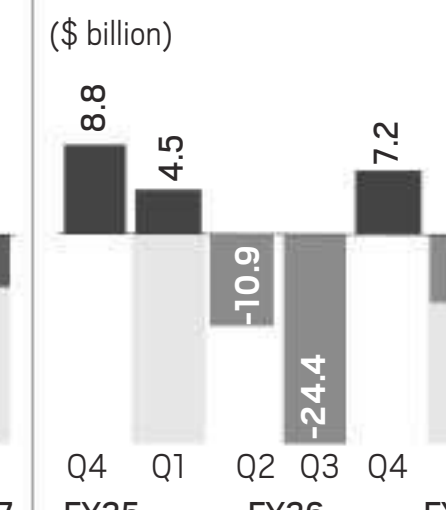
Current account balance
% of GDP (base year 2022-23)



Source: RBI



Accretion to forex reserves
(\$ billion)



■ Current account deficit seen comfortable near 1% of GDP

■ Higher energy costs threaten to widen current account deficit

ments (BoP) was an \$8.1-billion deficit in April-June against a surplus of \$4.5 billion in the year-ago quarter, as capital inflows could not fully cover the CAD.

However, large capital inflows through the RBI's special FCNR window for non-resident Indians and record-high forex reserves are likely to keep India's BoP deficit in check in FY27, economists said.

A revival in foreign portfolio inflows in the July-September quarter should also support the BoP position. Foreign portfolio investment

(FPI) recorded a net outflow of \$9.6 billion in the June quarter, compared to a net inflow of \$1.6 billion in the year-ago quarter.

According to data from the National Securities Depository Limited, India saw net FPI inflows worth \$7.7 billion in equity and debt in July-August.

Credit rating agency Icrs expects the CAD to widen to around 0.9% of GDP in FY27 from 0.7% in FY26, while remaining "comfortably manageable". "This would be comfortably financed, aided by the sizeable FCNR(B) inflows,

which should lead to an accretion to reserves in FY27 after a gap of two years," said Icrs' chief economist Aditi Nayar.

In April-June this year, CAD widened as the merchandise trade deficit rose to \$86.1 billion from \$68.9 billion a year ago. Net services receipts increased to \$51.6 billion in the first quarter of FY27 from \$47.9 billion a year ago. "Services exports have risen on a year-on-year basis in major categories such as computer services, other business services and transportation services," the RBI said in a release.

Personal transfer receipts, reflecting remittances by Indians, rose to \$42.9 billion in Q1FY27 from \$33.2 billion a year ago. Net outgo on the primary income account, mainly reflecting payments of investment income, fell to \$10.5 billion in the June quarter from \$13.3 billion in Q1FY26.

In the financial account, foreign direct investment (FDI) recorded a net inflow of \$6.1 billion in Q1FY27, higher than \$5.2 billion a year ago.

Non-resident deposits (NRI deposits) recorded a net inflow of \$2.8 billion in April-June compared to \$3.6 billion in Q1FY26. Such deposits are likely to rise sharply in September quarter thanks to the RBI's FCNR(B) scheme, which is expected to have drawn over \$80 billion till August 31.

The softer sales environment was reflected in work-force and purchasing decisions as employment in the sector fell for the first time in two-and-a-half years, though the rate of decline was "only fractional", S&P Global said.

Input buying expanded at the weakest rate in 62 months as some firms restocked while others trimmed purchases in line with softer demand, S&P Global said. Stocks of finished goods increased for the second month running, with companies linking the accumulation to lower-than-expected sales.

Price pressures eased in August. Manufacturers faced higher costs for materials such as steel and transport, but the overall rate of inflation was the weakest in six months, S&P Global said.

As input cost pressures eased, firms limited the increase in their selling prices. The rate of output charge inflation was the slowest in 45 months and below its long-run trend, S&P Global said.

West Asia fallout to clip EPC margins

SAURAV ANAND
New Delhi, September 1

LARGE ENGINEERING, PROCUREMENT and construction (EPC) companies are set to see operating margins fall 50-70 basis points to 8.2-8.4% this fiscal, as higher commodity, freight and insurance costs stemming from geopolitical disruptions outweigh the benefit of stronger project execution, according to Crisil Ratings.

The margin compression comes even as revenue growth of large, diversified EPC companies is expected to improve by 100-200 bps to 9-10%, powered by accelerating investment in generation and transmission, steady government infrastructure spending and overseas opportunities. Crisil's assessment covers 14 large EPC companies with aggregate revenue of more than ₹3.8 lakh crore last fiscal.

Cost pressures have intensified across key inputs including cement, steel and bitumen, while freight and insurance costs also remain elevated. Materials typically account for 55-60% of total costs for these companies.

Modi on GDP: Keep growing, ignore naysayers

● PM bats for Swadeshi push; FM says growth is secular

FE BUREAU
New Delhi, September 1

SLAMMING "NAYSAYERS" FOR allegedly spreading negativity despite India's 7.8% growth in Q1FY27, Prime Minister Narendra Modi said the pace must be maintained.

Calling for greater support for domestic production, Modi invoked the "Swadeshi Mantra" and "vocal for local", urging citizens to strengthen India's self-sufficiency. The prime minister also called upon citizens to avoid unnecessary travel abroad, to choose getting married in India rather than overseas, and to refrain from buying gold unless necessary.

Indian economy remained resilient in Q1 with GDP growth at a better-than-expected 7.8%, despite a challenging global environment. Analysts are now forecasting GDP growth to be around 7-7.5% in FY27 as against less than 7% estimated earlier.

In a video post on 'X' on Tuesday, Modi congratulated citizens for the latest growth figures, attributing the performance to their determination and perseverance despite the difficult global environment. "I would like to congratulate the citizens of India. 7.8% growth," he said, describing the performance as "an embodiment of collective strength."

The Prime Minister pointed

NIRMALA SITHARAMAN,
FINANCE MINISTER

Political parties have every right to question the government but should not undermine the efforts of ordinary citizens



Our policy is right. Our intention is clear. And the strength of 1.4 billion citizens is taking the country to new heights

to the turmoil facing the global economy, including wars, supply-chain disruptions and continuing uncertainty since the Covid-19 pandemic. "The world is engulfed in war. There is news of war all around. The world is in crisis. The supply chain is completely disturbed," Modi said. "From the time of Covid-19 till now, there has been no stability anywhere. Despite this, India is progressing rapidly," he added.

Modi said India must now build on the momentum rather than become complacent. "We have to maintain this pace. We have to grow," he said, stressing that self-reliance would be crucial to sustaining economic expansion.

He said the country must work to fulfil the aspirations of its younger generation and achieve developed-nation status as India approaches its 100th year of independence. "Our policy is right. Our intention is clear. And the strength of 140 crore citizens is taking the country to new heights," Modi said.

Speaking at the G20 summit in Asheville, North Carolina, Finance Minister Nirmala Sitharaman said, "I'm so pleased to say that this growth is secular. The growth is across the board. Manufacturing grew by 9.2% and financial and professional services grew by 12.1%."

Everyone participating in the summit, she said, was full of appreciation that, despite the global challenges, India has managed to achieve this kind of a growth even in the first quarter of this financial year. She added that this "bodes well for the rest of us."

Vedanta bets big on Northeast oil

SAURAV ANAND
New Delhi, September 1

VEDANTA OIL & Gas has partnered with Beicip-Franlab India to accelerate exploration and production growth in the Northeast, with the integrated subsurface programme having the potential to unlock up to 300 million barrels of oil equivalent (MMboe) of additional resources and reserves across the company's regional portfolio.

The programme will cover nine Open Acreage Licensing Policy (OALP) blocks and one Discovered Small Field (DSF) block, bringing seismic interpretation, resource evaluation and development planning under a common technical framework. It will focus on identifying new drilling opportunities while extracting additional value from existing discoveries and producing assets.

Beicip-Franlab will undertake geological and reservoir studies, seismic interpretation, prospect ranking, resource assessment and field-development planning across priority assets, including Hazarigaon and Rudra in the Northeast. The

opportunities identified will subsequently move through Vedanta Oil & Gas' technical-assurance and exploration-to-development processes.

"The Northeast holds significant untapped hydrocarbon potential and is a key pillar of our growth strategy," said Jim Johnny Gast, Interim CEO and Whole Time Director, Vedanta Oil & Gas.

He said the partnership would combine advanced subsurface expertise with integrated technical capabilities to accelerate prospect maturation and strengthen the exploration portfolio.

"This programme will help build a robust pipeline of drill-ready opportunities while supporting our commitment to increase domestic energy production and contribute to India's energy security," Gast said.

Through integrated subsurface evaluation and development planning, the programme aims to improve resource visibility, accelerate appraisal and field-development decisions and create a clearer pathway from exploration to production.



EXPORTERS FLAG RISKS

■ Commerce ministry met exporters ahead of Goyal's US visit

■ Industry representatives shared concerns over US market access

■ Goyal will raise exporters' concerns with US officials

■ Goyal attends G-20 trade ministerial meet Sept 30-Oct 1

■ India-US bilateral trade talks remain a key focus



■ Key sectors including pharma, textiles & engineering participated

■ Exporters face a 10% additional US tariff

■ Section 301 investigation over excess capacity remains a concern

■ Proposed US sanctions bill could impose tariffs up to 100%

■ US order numbers rose, but order sizes declined

the conference — to hold bilateral talks as both sides negotiate a Bilateral Trade Agreement (BTA).

The Tuesday meeting was chaired by Additional Secretary Darpan Jain, who acts as India's chief negotiator for the proposed BTA. Representatives across critical export sectors—including pharmaceuticals, engineering, textiles, agriculture, chemicals, auto components, marine products, and

electronics—attended the meeting, alongside delegates from apex trade bodies including CII, FICCI, Assocham, and FIEO.

"The additional secretary wanted to understand the situation of exports to the US, what the order bookings are, which sectors are doing well, which sectors are not doing well, and whether there are any concerns that the US can be requested to address," an

industry official who participated in the meeting said.

While India is facing the same level of additional tariff of 10% as other major exporters to the US, exporters are worried about what the second investigation on excess manufacturing capacities under Section 301 of the Trade Act can bring. The first investigation on the use of forced labour had brought these 10% additional duties on India and

59 other countries.

The industry was also concerned about the Lindsey O. Graham Sanctioning Russia and Iran Act of 2026 that has been passed by the US Senate and is before the US House of Representatives. The bill empowers the US President to impose additional tariffs of up to 100% on countries buying oil from Iran and Russia.

India's exports to the US had been flat in April-June of this financial year but increased 12.8% year-on-year in July as uncertainty over tariffs imposed under Section 122 of the Trade Act and Section 301 were settled.

"In the last month, the number of orders has increased, but the size of the orders is going down. The number of buyers placing orders has increased. There is a trend of de-risking that has been noticed on the part of buyers. They are now splitting their orders among different countries," another industry official said.

Some exporters sought early conclusion of the BTA, which would reduce uncertainty in India's biggest market.

Own the phone

Ownership is the starting point; the test is products consumers actually choose

THE NEW MOBILE phone manufacturing scheme (MPMS) is attempting something that the first production-linked incentive (PLI) scheme could not: create an Indian smartphone brand with the scale, technology, and product capabilities to compete with global and Chinese rivals. The distinction matters. The first mobile PLI was overwhelmingly about manufacturing success, attracting Apple’s suppliers, Samsung, and other global manufacturers, and turning India into a major production and export base. It also had a separate category for domestic companies, with the stated objective of creating Indian manufacturing champions. Lava, Bhagwati Products (Micromax), Optiimus, Padget Electronics, and United Telelinks Neolyns were among those approved under that category. Yet the domestic companies, barring exceptions such as Dixon Technologies, struggled to meet the scheme’s incremental production targets.

The lesson from the first PLI should therefore be central to assessing the new scheme. The problem was not simply that Indian companies lacked a production incentive. They lacked the scale, product differentiation, technology, distribution, and brand strength to take on Samsung, Xiaomi, Vivo, Oppo, and others in a fiercely competitive market. Indeed, the experience of the first PLI showed how much easier it was for a company with an established global brand and large manufacturing orders to scale production than for an Indian company to build a consumer brand at the same time. The government is now trying to address that gap by making the second segment of MPMS explicitly about the ownership of the product, rather than merely its manufacture.

That is the right direction, but it also raises the harder question of whether subsidies can solve what is fundamentally a product and market problem. The new scheme is considerably more targeted: an Indian brand must have more than 51% Indian ownership, Indian management control, hold its intellectual property and trademark in India, and have in-house design and research and development (R&D) capabilities in the country. It can receive 5% on eligible sales, another 3% for Indian design and R&D, and up to 1.5% for domestic sourcing. This is more meaningful than simply subsidising output. But the government should be careful not to equate an Indian-owned company with an Indian product. Ownership is only the starting point. The real test is whether these companies develop technology and designs that consumers choose over established alternatives, build scale without continually depending on state support, and eventually export products because they are competitive, rather than because they are subsidised.

The government’s decision to ask prospective Indian brands to develop designs that can compete with the best in their segments is therefore more important than the size of the ₹62,500-crore outlay. If, as Electronics and Information Technology Minister Ashwini Vaishnaw says, three companies can bring such products to market within 10-14 months, the government will get an early indication of whether the new approach is working. But it should measure success differently this time. The first PLI demonstrated that India could manufacture smartphones at scale; the new scheme has to demonstrate that Indian companies can design, own, and sell smartphones at scale. The ultimate measure should not be how many companies qualify for incentives, or how much production they generate while the incentives last, but whether at least one Indian brand emerges strong enough to compete when the subsidy disappears. Otherwise, India risks repeating the manufacturing success of the first PLI without solving the more difficult problem it has now set itself: building a product company of its own.

Trump's popularity has reached a critical point

PRESIDENT DONALD TRUMP can dismiss public opinion polls as “fake news” all he wants. That won’t change the fact that the commander-in-chief is in political distress — even according to survey outlets that usually give him more favourable ratings.

Perennially reliable RealClearPolitics, as of Monday, averaged Trump’s job approval rating a hair under 40% — dismal even for this polarising, second-term president. Credible polling averages from *The New York Times* and *Silver Bulletin*, the Substack published by veteran political analyst Nate Silver, also show Trump drowning with American voters, both with ratings of around 38%.

Trump’s numbers have been cratering in data recently gathered by Morning Consult, Rasmussen Reports, and RMG Research — all dependable polling outfits that regularly show higher job approval ratings than their competitors. In their three most recent polls, the Oval Office caretaker registers an average job approval rating of around 44% (Morning Consult), 42% (Rasmussen), and 43% (RMG Research). Those numbers are in line with the ones produced by firms and academies that Trump and Republicans often dismiss as biased or incompetent.

So why do some polling outlets typically show Trump with higher job approval ratings than competitors? And why isn’t that currently the case?

Rasmussen, whose pro-Trump messaging has caused Democrats to view its data suspiciously, generates presidential approval tracking numbers from a “likely voter” screen that breaks down as follows: 35% Democrat, 33% Republican, and 32% independent. “We are pretty confident that our likely voters-based numbers do, in fact, reflect national likely voter sentiment,” Ted Carroll, the firm’s president, told me. As for Trump’s drop in their daily surveying, Carroll blamed the Iran war: “When there is news that points towards a favourable resolution of Iran hostilities, we see single night jumps,” he explained. “When bad news comes, we see it reverse.”

In addition to measuring voters’ assessment of Trump’s job performance, RMG gauges his political strength broadly by asking them to focus on issues, presenting them with this question: Offered a choice between four candidates of “equal character and competence”, do you prefer candidates who advocate “Trump-like policies”, those associated with “traditional” Republicans, “traditional” Democrats or socialists? New York Representative Alexandria Ocasio-Cortez? The plurality of voters RMG surveys have typically opted for the “Trump-like policies” candidate.

But that has steadily changed since Trump returned to the White House. “When President Trump took office in January 2025, 38% said they preferred Trump-like policies. It’s down to 28% now. The number saying ‘traditional R’ is catching up,” RMG President Scott Rasmussen told me.

RMG’s findings track with what other pollsters and political analysts are seeing. Trump’s loyal voting base is as invested in him as ever. That’s not insignificant. These are the Americans responsible for his unnaturally high floor of support in surveys dating to his first presidency. Yet Trump won twice (and lost once but only narrowly) because his electoral coalition coopted Republican regulars of all stripes: fiscal conservatives, free traders, foreign policy hawks, constitutionalists, voters who favour measured statesmen over bombastic provocateurs. In 2024, Trump’s breadth of support was particularly impressive, with backing from Hispanics and younger voters that was higher-than-usual for a GOP nominee. But the numbers with all of them are eroding, leaving Trump and his party politically exposed as the mid-term polls approach.

Trump’s apparent solution is to air a major advertising campaign that puts him and his second-term record front and centre for the voters to consider as they mull which party to support this fall — or, in the case of many apathetic GOP voters, whether to vote at all. Yet the president’s strategy presupposes that voters are only unhappy, as one congressional Republican recently claimed, because the “leftwing media” hoodwinked them into believing as much. Good luck with that.

ECONOMIC D-DAY

USA's OPERATION ECONOMIC OUTCAST LESS A TEST OF IRAN THAN OF CHINA; DIRECT EXPOSURE LIMITED FOR INDIA

Iranian sanction, Chinese arena

THE US’S LATEST sanctions offensive against Iran marks a significant escalation in Washington’s attempt to turn economic coercion into a decisive instrument of statecraft. Unveiled on August 24 and described by President Donald Trump and Treasury Secretary Scott Bessent as an “economic onslaught”, the campaign — officially designated Operation Economic Outcast by the US Treasury — seeks to do what earlier sanctions have struggled to achieve: Sever Iran’s remaining links with the global economy.

The rhetoric is revealing. Bessent’s comparison with D-Day suggests Washington sees the campaign not as another incremental sanctions exercise but as the economic endgame of a broader confrontation with Tehran. It comes after months of military pressure, disruption of Iranian maritime activity, and efforts to constrain Iran’s ability to export energy. The objective is not simply to punish Iran, but to eliminate the economic space that allows the Iranian state to sustain itself.

The logic is straightforward. If military action has constrained Iran’s physical capacity and maritime pressure has restricted its trading options, sanctions are designed to attack the financial infrastructure that allows Tehran to absorb those pressures. The ultimate target is Iran’s economic oxygen.

The immediate backdrop is the failure of ceasefire diplomacy and the continued Iranian disruption of shipping through the Strait of Hormuz. For Washington, Iran’s ability to continue generating revenue despite the pressure represents unfinished business. Oil remains particularly important as it provides the resources necessary to sustain the Iranian state and the Islamic Revolutionary Guard Corps.

Operation Economic Outcast therefore expands the battlefield beyond Iran itself. The US is increasing the risks for third-country companies, banks, and intermediaries that facilitate Iranian commerce. New sectoral measures cover digital assets, technology, gold, aviation, and shipping — areas that have become

HARSH V PANT

Vice President, Studies and Foreign Policy, Observer Research Foundation, New Delhi

important conduits for Iranian revenue generation and sanctions evasion.

Around 60 entities, individuals, and vessels across jurisdictions including the UAE, China, Hong Kong, Singapore, India, and Europe have also been targeted for allegedly supporting Iranian oil exports, procurement networks, or cyber operations. This is what distinguishes the latest campaign from a conventional sanctions exercise. Washington is no longer simply attempting to make transactions with Iran expensive. It is seeking to make the entire ecosystem surrounding those transactions dangerous.

The message to third countries is blunt: Neutrality may not be enough. Financial institutions, traders, shipping firms, and governments that provide Tehran with a lifeline could themselves become targets. Yet, the effectiveness of such a strategy will depend less on the number of names added to a sanctions list than on whether Washington can persuade the principal remaining buyers of Iranian commodities to change their behaviour. And here, the China question becomes unavoidable.

Iran’s economic survival has increasingly depended on China. Beijing has accounted for the overwhelming majority of Iranian oil purchases in recent periods, with estimates placing its share at roughly 80-90%. The US can sanction another trader, vessel, or intermediary. But if China remains willing and able to purchase Iranian oil, Washington will struggle to achieve Tehran’s complete economic isolation. The sanctions architecture hence runs

into a larger geopolitical problem: the US is attempting to coerce Iran while managing its much more consequential confrontation with Beijing.

The stakes are considerably larger than Iran. Iranian oil exports to China have already declined sharply from earlier peaks of around 1.4 million barrels per day to roughly 500,000-plus barrels per day in recent months. But the crucial question is not simply if the volume has fallen. It is whether Beijing will accept further cuts under US pressure or whether it will build increasingly sophisticated mechanisms to preserve access to Iranian energy. This is where Operation Economic Outcast will ultimately be tested.

India occupies a considerably less consequential position in Iran’s economic ecosystem. New Delhi largely abandoned regular Iranian oil purchases following the tightening of American sanctions around 2019. Bilateral trade, once substantially larger, has contracted to \$1-1.6 billion in recent periods. Indian exports are dominated by agricultural products and pharmaceuticals, while imports from Iran are comparatively limited.

There was a brief opening for Iranian crude sales under a US waiver earlier in 2026, but India did not emerge as a major purchaser. The latest US measures nevertheless have a direct Indian dimension. Four India-based firms and three Indian nationals have been sanctioned for facilitating or importing Iranian petroleum and petrochemical products, transactions collectively valued at about \$119 million.

Coping with food and fuel shocks

N CHANDRA MOHAN

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

THE PROSPECT OF the Global South, including India, being adversely impacted by supply-side shocks emanating from Russia’s war with Ukraine and the US-Israel conflict with Iran is definitely not good news. Russia’s conflict has entered a more dangerous phase in its fifth year as both sides are relentlessly attacking each other’s grain ports and vessels. There is a sense of déjà vu as this conflict threatens a food crisis, given that the warring parties are major exporters of wheat, barley, and sunflower oil. The uneasy lull in West Asia has been broken by US and Iran strikes, all of which implies that the Strait of Hormuz — through which a fifth of global oil supplies pass — remains shut. Global oil prices remain elevated as a consequence.

A global food crisis also stalked the Global South when Russia invaded Ukraine in February 2022. Prices of wheat and other essentials spiralled up due to disruption in the Baltic Sea region that hindered exports from Ukraine and Russia. But these adverse risks abated in a year due to a UN-sponsored Black Sea grain initiative that allowed the free passage of ships transporting grain. That deal collapsed in July 2023. What makes matters worse this year is that Russia has rejected a Black Sea truce as it saw no grounds for “half measures” that would offer respite to the other side. There is bound to be a major uptick in wheat prices as Russia and

Ukraine have a combined share of 27.4% in global wheat exports.

Global wheat prices are surging also due to climate change. Crop prospects are somewhat bleak with persistent drought conditions in the southern plains in the US, which have impacted hard red winter wheat output. The US will register its worst harvest in half a century. Wildfires and record heat conditions are expected to adversely impact wheat production in

countries like France in the European Union. Australia’s wheat output has declined due to the anticipated dry conditions and rising fertiliser costs. All of this is bound to impact food security in the Global South. The number of acutely food-insecure people in the most vulnerable nations could rise by a fifth to 247 million by end-2027, according to the World Food Programme.

As if all of this weren’t bad enough, global food prices will remain high due to El Niño conditions that happen every two to seven years. El Niño has hit global coffee and cocoa prices. This surge in coffee prices is seen in countries like Brazil. Maximo Torero, chief economist at the Food and Agriculture Organization, told the *Financial Times* that “right now, my con-

cern is durum wheat and rice”, adding that a combination of El Niño and lower fertiliser usage in Australia, a major wheat grower, and India, the world’s biggest rice producer, was threatening to hit yields. “It’s a compound effect that is dangerous,” according to him. Sugar production has declined across the Asia-Pacific during strong El Niño episodes with India banning exports.

Fuel shocks due to the West Asian conflict compound the bad news for the Global South and highly energy import-dependent countries like India. There is a view that global food shocks are more consequential as the world has adjusted to the supply disruption in the Strait. Nothing could be further from the truth. Consider the travails of Saudi Arabia, the largest oil producer in

the region, in shipping out its oil due to the blockaded Strait. It has depended on its East-West pipeline which extends from its eastern oilfields to the Red Sea port of Yanbu to supply to Europe and Asia. But the attacks of the Iran-backed Houthi forces in the Red Sea have forced it to rely on a route through the Suez Canal that is longer and costlier for its oil exports.

Since the US-Iran war began on Feb-

ruary 28, Brent spot prices in March-August have averaged \$98 a barrel, up 41% from March-August 2025. The rise in the Indian crude oil basket is of a similar order of magnitude. Costlier oil widens India’s trade deficit and pushes up domestic prices. As energy imports have to be paid for in US dollars, this would result in further downward pressures on the rupee. Such a sustained oil shock has forced India to pay more for its crude imports. Although the bullish Q1 GDP growth numbers in FY27 may indicate that the economy is resilient in the face of supply-side shocks, there is a clear and present danger of Brent prices remaining elevated due to the elusive prospects for peace in West Asia.

Food and fuel shocks over a prolonged period do not augur well for the Global South and India. There is no alternative to remaining vigilant and ensuring that the agriculture sector copes with this disruption. In this regard, the current easing of the ban on wheat exports is a welcome step as it can be a public good to alleviate global hunger while also boosting farmer incomes amid depressed domestic prices. India must enhance its energy security through greater self-sufficiency in domestic oil and gas production over the medium term.

Views are personal

LETTERS TO THE EDITOR

Tech progress

Apropos of “The battle for AI hegemony” (*FE*, September 1), the growing technological rivalry between the US and China has consequences far beyond the two countries. AI is becoming central to economic strength, security, and industrial competitiveness. Yet the world would benefit more from healthy competition than technological monopolies or excessive restrictions. India should avoid becoming merely a market for tech-

nologies developed elsewhere. Greater investment in research, computing infrastructure, skilled manpower, and responsible innovation is essential. Universities, industry, and the government must work more closely to build domestic capability. At the same time, international rules on AI safety and data governance deserve wider support. Technological leadership should ultimately promote progress and opportunity, not deepen geopolitical divisions. —M Barathi, Bengaluru

Resist complacency

Apropos of “Resilient India” (*FE*, September 1), India’s 7.8% GDP growth in the first quarter reflects commendable resilience despite the continuing West Asian conflict and an increasingly uncertain global economic environment. Direct tax relief, GST rationalisation last year, and an accommodative monetary policy have strengthened consumption and investment, but their stimulative impact may not be permanent. Meanwhile, elevated cru-

de oil prices, geopolitical instability, and possible global monetary tightening could intensify inflationary pressures, widen the import burden, curb capital inflows, and undermine private investment. The government must resist complacency and focus on structural reforms, fiscal prudence, and policy stability. Sustaining this impressive momentum, rather than celebrating it, is the greater economic challenge. —N Sadhasiva Reddy, Bengaluru

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Resilient performance

Buoyant GDP in a stressful period is noteworthy

The economy has pulled a rabbit out of the hat once again, with real GDP (Gross Domestic Product) for the first quarter of FY27 expanding by 7.8 per cent, which is a much faster pace than either the central bank’s projection of 7 per cent or private agencies’ 7-7.3 per cent forecast.

It is heartening to see multiple engines firing, in times that were considered adverse. One, agriculture and allied activities have managed 3.6 per cent growth (against 4.4 per cent last year), despite the ongoing El Nino. Though the overall rainfall deficit remains at nearly 14 per cent till date, kharif sowing has made reasonable progress with acreage just 2 per cent short of last year’s levels. Two, manufacturing (9.2 per cent growth against 8.3 per cent last year) and construction (7.7 per cent versus 5.2 per cent) have shown good traction despite Iran war-related supply disruptions and spiralling energy and input costs. More granular data from corporate results suggest that buoyancy in manufacturing is being powered by uptick in automobile demand, rising electronics production, electric vehicle adoption and clean energy transition. Three, exports have seen some acceleration despite the war, doubling their growth rate to 12 per cent in Q1 FY27 from 6 per cent in the same quarter last year. Exports out of India are likely benefiting from a stronger yuan and a weaker rupee. This is an advantage that can quickly wear off. However, there’s also structural diversification underway in exports, with manufacturers now tapping into expanding export opportunities for precision manufacturing, electronics, defence and aerospace. This will hopefully last.

On the expenditure side, investment demand has done the heavy lifting with Gross Fixed Capital Formation (GFCF) growing 11.9 per cent in real terms this quarter, compared to just 5.8 per cent during the same time last year. While government capital expenditure grew by 20 per cent plus, private capex, defying expectations, picked up on the back of strong demand for automobiles and durables, export traction and inbound data centre investments. PFCE (Private Final Consumption Expenditure) maintained 7.1 per cent growth (6.8 per cent last year). The impact of the Iran war on consumers seems to have been contained by low interest rates which have kept EMIs under check.

While the real economy was buoyant in Q1, nominal GDP expanded just 10.3 per cent — substantially undershooting forecasts of 13-14 per cent. This is attributed to the statistics office moving to the vastly improved double deflator method with granular producer prices for estimating GDP, instead of the earlier rough-cut method of using CPI or WPI. The low growth in nominal GDP can derail this year’s fiscal deficit target, given the escalation in subsidies caused by the Iran war. The trend of India’s GDP growth continually overshooting estimates also puts pressure on the Monetary Policy Committee to hike rates — if inflation trends up in the festive months.

POCKET



CAS performing 2 jobs together

STRETCHED. While establishing a reliable closing price is fine, derivative delivery settlement requires a dedicated auction



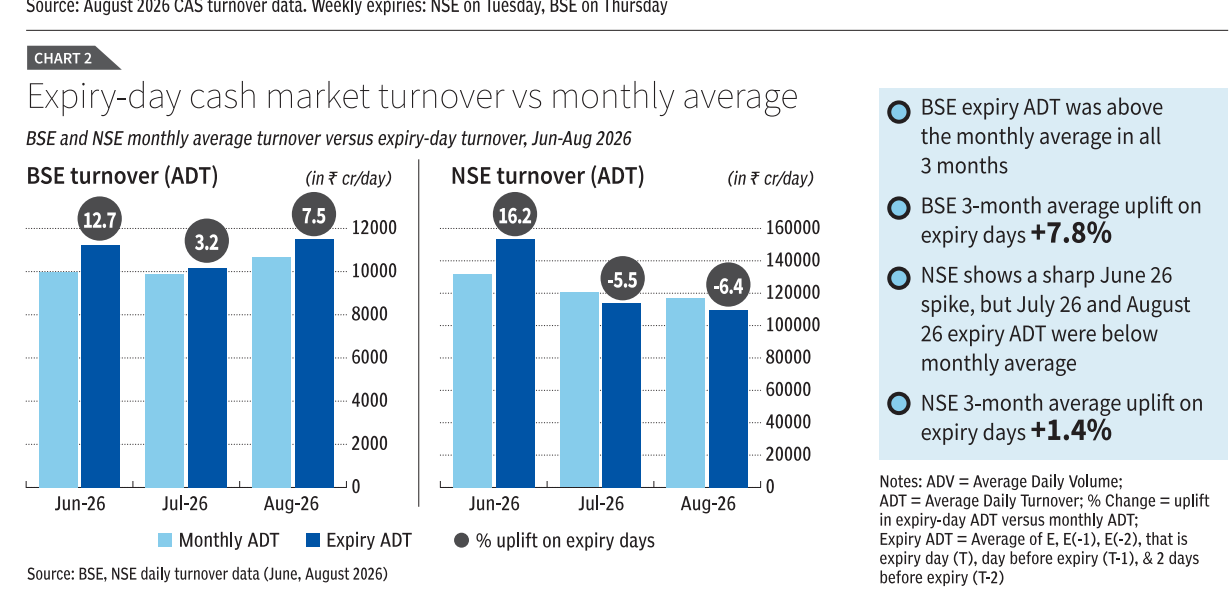
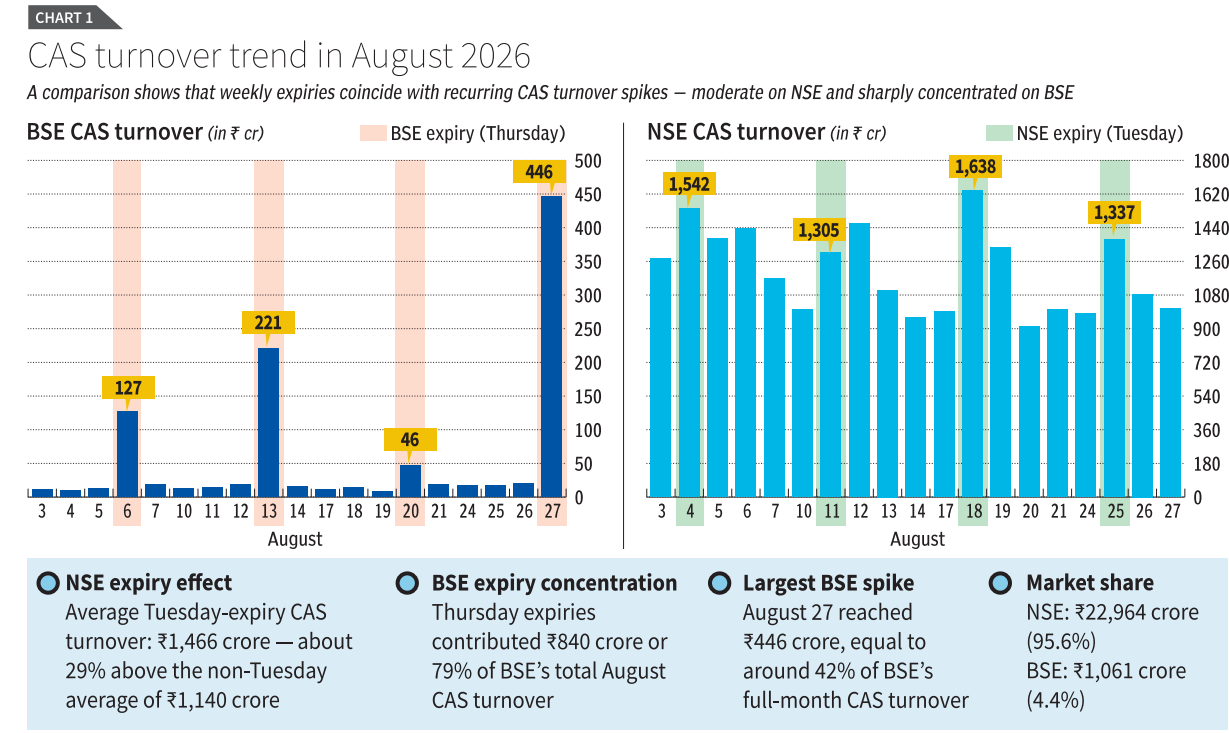
Last Thursday afternoon, during the 15 minutes that now determine India’s closing prices, BSE Ltd’s Closing Auction Session (CAS) recorded turnover of ₹446 crore. On a regular trading day, it typically handles about ₹15 crore. That single session accounted for more than two-fifths of BSE’s total August closing-auction turnover. Two days before, the National Stock Exchange finished its monthly settlement with little turbulence. The closing auction totalled ₹1,377 crore — less than the turnover from a typical Tuesday a week prior. On the surface, the process seems to have managed NSE’s first monthly settlement effectively.

Together, however, they lead to a more significant conclusion than a simple comparison of exchanges. A straightforward explanation is that this is primarily a liquidity issue: thin order books tend to jump, while deeper ones can absorb pressure. Nonetheless, the pattern of expiries reveals a more insightful story. The first weekly expiry under the new system was unsettled; the second was more disruptive and eventually led to a regulatory order. By the third expiry, activity had nearly stabilised. In just three weeks, participants seem to be adapting to the new auction mechanism.

Then the monthly expiry occurred, and the pattern was disrupted. The key distinction isn’t between the NSE and BSE; it’s between weekly and monthly settlement cycles. Weekly index derivatives are settled in cash, with no share transfers — positions are simply adjusted through an accounting entry based on the closing price. Monthly expiry, however, is fundamentally different because, since 2018, India has employed physical settlement for single-stock futures and options, meaning actual share delivery is required (see Charts 1 and 2).

This creates pressures that build over days. Margins rise, traders arrange securities, and positions are unwound. All this culminates in demand for a single settlement price at the end of the session. The CAS is therefore being asked to perform two jobs simultaneously: establish the market’s authoritative daily closing price and absorb delivery-related derivative unwinding — within just 15 minutes. The traditional expiry-day surge appears to have weakened, at least for weekly expiries. That is a real improvement, but it should not be mistaken for the disappearance of settlement pressure.

The pressure has shifted. What was once spread over six hours is now compressed into the final 15 minutes, particularly at monthly expiry. That window is not yet deep enough to carry this burden reliably. Closing auctions



account for about one per cent of India’s daily cash-market turnover. By contrast, on Euronext auctions represent more than a quarter of equity-market activity. India’s passive funds — the natural participants that can deepen the close — are still entering the mechanism. Regulators are rightly engaging with fund houses and have proposed to reform securities lending, which may improve the supply of stock into auctions. But these measures address participation. That does not answer a more fundamental question: what should the closing auction be designed to accomplish?

THE APPROACHES ABROAD

Mature markets differentiate these functions. The US clears its oldest quarterly index contracts through a Special Opening Quotation the next morning, primarily to reduce pressure at the close. Its lighter, more frequent contracts settle at the close because the market can handle them. Britain, on the

other hand, employs a separate Exchange Delivery Settlement Price auction at 10:10 a.m. on expiry day, halting continuous trading during that process. The underlying principle is clear: frequent, cash-settled contracts may settle at the close, whereas larger periodic settlements involving delivery and significant unwinding shall have their own dedicated mechanisms. India has implemented the first measure, and now it’s time to focus on the second. The CAS should continue to aim at establishing a reliable daily reference price for investors, passive

The weekly data suggests the market is adapting faster than expected. The argument is against forcing a single mechanism to serve two structurally different purposes

funds, index providers, and valuation agencies. Weekly index derivatives can still settle during this session. In contrast, monthly contracts — especially physically settled single-stock derivatives — shall be transferred to a dedicated auction, either at the opening, similar to the US approach, or through a separate mid-session window, as in Britain.

This is not an argument against CAS. The weekly data suggests the market is adapting faster than expected. The argument is against forcing a single mechanism to serve two structurally different purposes. A reliable closing price and derivative delivery settlement are distinct market products. Only one needs to be finalised at 3:30 p.m. If the monthly expiry continues to strain the auction, repeatedly testing its capacity will not solve the design problem. It’s time to redesign the door rather than test the frame.

The writer is Partner, MCQube

The vanishing fiscal discretion of States

The squeeze goes beyond ‘committed expenditure’ to another layer of obligations that is not recognised

Aswathy Rachel Varughese

How well a government spends matters as much as how much it spends, and on this count India’s States are slipping. Across States, developmental expenditure has fallen to about 61 per cent of total spending, from 67 per cent before the pandemic. Capital outlay, mainly for infrastructure development, is increasingly the first item to be trimmed when budgets tighten. For an economy that relies on its States to deliver health, education and public infrastructure, a decline in the quality of their spending is no minor accounting worry. It shapes long-term growth and the services citizens actually receive.

Why is the quality deteriorating? The usual answer points to the fiscal space of the States, measured by the ratio of committed expenditure, salaries, pensions and interest, to revenue receipts. Once these consume two-thirds or more of revenue, little is thought to remain for anything else. But committed expenditure is a restrictive and misleading gauge. It suggests that whatever is left after paying staff,



STATES. Fiscally stressed

pensioners and creditors is money a finance minister can freely direct. In practice, it is not. Beneath the headline ratio sits a layer of obligations no government can switch off. Grants to local bodies, mandated by State Finance Commission awards, typically claim 4-6 per cent of revenue receipts. A State’s matching share in Centrally Sponsored Schemes is effectively compulsory, since declining it means forfeiting the Centre’s contribution, and takes another 4-6 per cent. Add spending on judicial orders, elections, disaster management and pension contributions, and this non-discretionary layer absorbs a further tenth to a sixth of revenue. None

of it appears as committed expenditure, yet none of it is negotiable. The effective fiscal space, what a State can actually choose to spend, is far smaller than the committed ratio implies.

STRUCTURAL SHIFTS

Two structural shifts have tightened this room further. The GST folded much of the States’ tax autonomy into a shared pool, leaving them more dependent on transfers they do not control. And those transfers have moved steadily from untied grants towards conditional, tied schemes that dictate where the money must go. A State loses on both counts, less revenue of its own, and less freedom over what it receives. The consequence is predictable. With genuine discretion reduced to a sliver, governments concentrate what little they control on spending that is politically visible, cash transfers, subsidies and welfare announcements that win attention quickly, rather than on maintaining assets or building new ones, whose returns arrive slowly and quietly. Capital formation becomes the residual, and the upkeep of existing infrastructure is deferred. The quality of public expenditure erodes less through

carelessness than through a structure that rewards the visible over the durable. The cost of this is intertemporal. A State keeps paying to run schools and clinics while spending less to build and maintain them, so its capacity to deliver services weakens even as the welfare bill grows.

The recent white papers from Kerala and Tamil Nadu show how narrow this room has become. The remedy lies less in lecturing States about discipline than in widening their genuine fiscal space, by restoring a measure of revenue autonomy, rebalancing transfers back towards untied grants, and judging fiscal space by the effective residual rather than the committed ratio. The change in transfer mechanism can help by loosening the conditions tied to transfers and protecting a minimum share of the budget for capital outlay. Until the conversation shifts from how much States are committed to spend to how little they are actually free to decide, both the squeeze and its cost to the quality of governance will keep being misread.

The writer is Assistant Professor, Gulati Institute of Finance and Taxation. Views are personal

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.

Seed exports

This is with reference to the article ‘Sorting out seed exports’ (September 1). The government has taken an important step forward by simplifying export procedures through DGFT’s digital platforms, but there’s a need to further streamline the regulatory and compliance requirements. The DGFT’s digital platform may be connected with SATHI (Seed

Traceability, Authentication and Holistic Inventory) portal meant for converting manual certification process into a globally verifiable digital asset. Further, quality conscious post harvest processing and reliable logistics are to be ensured, as seeds are quality-sensitive products and quality of seeds makes all the difference in exports. Kosaraju Chandramouli Hyderabad

SEBI’s CAS experiment

The article ‘SEBI shouldn’t have gone in for CAS’ (September 1) rightly captures the judgment error in bringing in a new Closing Auction Session (CAS) to fix a system which was not even remotely broken. The implementation has led to wild swings in Sensex at closing and the increased volatility has unfairly favoured the sophisticated derivative strategy in a thin market.

There are enough challenges in the market, with geopolitical, inflation and growth risks. The timing of this move by SEBI could not have been worse. Pradip Menon Kochi

IPO investing

Apropos ‘Failed anchors’ (September 1), retail investors should not subscribe to an IPO

merely because familiar institutional investors have anchored it. Institutional participation may signal confidence, but it cannot guarantee post-listing gains. Investors must assess the company’s financial performance, industry outlook, risks disclosed in the prospectus and their own risk tolerance before subscribing. NR Nagarajan Sivakasi, TN

Logistics intelligence

Logistics data will be key to competitiveness

Chandrajit Banerjee

For much of modern economic history, national competitiveness was shaped by visible infrastructure. The investments in roads, ports, railways and warehouses investments enabled production to scale, markets to integrate and firms to reach customers at lower cost.

The next frontier of logistics competitiveness, however, will not be defined by physical capacity alone, but by the quality of information that allows such capacity to be discovered, compared, trusted and used.

The economics of logistics intelligence therefore rests on five connected principles: reduction of information asymmetry, lower transaction costs, higher asset productivity, better capital allocation and stronger network effects. Together, these principles explain why countries and companies are investing in shared logistics data systems rather than relying only on asset expansion. Global experience supports this logic.

Singapore's PORTNET system links a large community of port and logistics users and enables high-volume digital coordination across shipping, port, freight and trade processes.

The US' Freight Logistics Optimization Works is a public-private partnership in which participants share logistics data and receive aggregated, anonymised visibility into demand, supply and throughput. Companies can anticipate congestion, align capacity with demand and improve resilience before disruptions become costly.

Japan's collaborative logistics initiatives point in the same direction.

The EU's electronic Freight Transport Information regulation provides a framework for the electronic exchange of freight transport information between businesses and authorities.

For India, this debate is timely. The National Logistics Policy, PM Gati Shakti, Unified Logistics Interface Platform (ULIP) and the Logistics Data Bank have strengthened digital integration and decision support. ULIP has facilitated over 160 crore digital transactions, while the Logistics Data Bank has tracked over 10 crore EXIM containers.

ECONOMIC BENEFITS

For manufacturers, logistics intelligence translates into lower delivered cost, better route



LOGISTICS. Data focus /iStockphoto

choices, more reliable partners and improved working-capital efficiency. When transport uncertainty declines, firms can reduce buffer stocks, shorten fulfilment cycles and serve wider markets with greater confidence.

For MSMEs and exporters, the gain is market access. For smaller firms a visible logistics ecosystem lowers search and verification costs, allowing them to connect more easily to national and global value chains.

For logistics service providers, the benefit is demand discovery. Regional transporters, warehouse operators, technology firms and specialised service providers can become visible to new customers. This increases utilisation, reduces idle capacity and enables smaller operators to participate in more organised supply chains.

For investors and infrastructure developers, logistics intelligence improves capital allocation. Data on demand clusters, industrial corridors, service gaps and utilisation patterns helps investors place capital where economic need is real.

For governments, it strengthens policy targeting. Better visibility enables public agencies to identify bottlenecks, prioritise infrastructure, monitor corridor performance and design interventions that improve competitiveness rather than merely expand capacity.

For the economy as a whole, these user-level gains compound into larger outcomes: higher asset productivity, lower logistics cost, faster trade movement, stronger manufacturing competitiveness, improved export readiness, better resilience and more inclusive participation by smaller enterprises.

The future of logistics, therefore, is not merely about moving goods more efficiently. It is about enabling economies to use resources more intelligently.

The writer is Director General, CII

Test of India's energy diplomacy

New Delhi must continue diversifying its energy supply base and maintain equidistance from all geopolitical blocs

CAPITAL IDEAS.



RICHA MISHRA

At the SCO and BRICS Summits, India's diplomatic nous will be put to severe test. The core challenges are clear — India must manage its massive economic dependence on China, resist being pulled into a formal Western alliance by the US, and aggressively secure its energy sovereignty.

As the world's fastest-growing major economy, a global technology hub, and a rising space pioneer, New Delhi's geopolitical heft is undeniable.

Yet, India's economy remains dangerously exposed to a handful of maritime chokepoints and distant battlefields.

So far, India's energy pragmatism has delivered tangible benefits. Russia has become its largest crude supplier — as discounted barrels help contain import costs and inflation — while traditional Middle Eastern suppliers, particularly Iraq, Saudi Arabia, and the UAE, remain central to India's energy security. At the same time, the US has expanded its role in supplying LNG, LPG, and crude.

This diversified approach reflects India's broader doctrine of strategic autonomy — securing affordable and reliable energy for a rapidly growing economy that imports nearly 90 per cent of its crude.

ENERGY CHOKEPOINTS

However, going ahead, this strategy will become harder to manage. India faces potential secondary sanctions and trade pressure from the West while remaining exposed to instability and chokepoint risks in the Middle East, particularly around the Strait of Hormuz.

So will New Delhi pick sides? This will depend on how US enforces sanctions on Russian oil. Also US President Donald Trump may be keen on selling US and Venezuelan oil to India.

If the war prolongs — particularly in Iran — India may tilt towards Russia for



ENERGY COMPULSIONS. India's strategic choices are scrimped by its massive reliance on oil and gas imports GETTY IMAGES

oil, defence and even fertilizer as it cannot risk supply disruption.

Similarly, India is heavily dependent on Chinese imports. The 26th Shanghai Cooperation Organisation (SCO) Summit and the 18th BRICS Summit could provide some indicators on India's stance.

In this backdrop New Delhi is unlikely to pick a side. Instead, it will probably continue adjusting its energy relationships according to prices, sanctions, supply disruptions, and domestic economic priorities. Russian purchases may decline when Western pressure intensifies and rise again when market conditions make them attractive, while the US and Middle Eastern supplies can expand as circumstances change.

The more important long-term

Despite emerging as a key exporter of refined petro products, India's reliance on imported crude oil and gas has deepened over the years, making it vulnerable to global price fluctuations

STATISTALK.

Compiled Dhuraveil Gunasekaran | Graphic Visveswaran V

India's Defence Flywheel Is Gaining Altitude

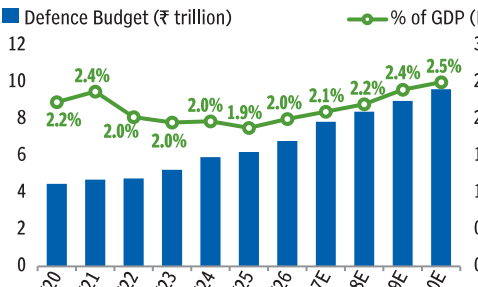
India's defence story is evolving from import dependence to a self-sustaining manufacturing and export cycle, says Ashika Stock Broking. Defence capital outlay is projected from ₹1.6 trillion in FY25 to rise to ₹2.9 trillion by FY30, while a multi-year procurement pipeline spanning Multi-Role fighters, tanks, Tejas Mk2 jets and P751 submarines promises strong demand visibility. Defence imports are declining even as exports are expected to grow at an 18% CAGR through FY30, reflecting the success of indigenisation. Rising order books and healthy book-to-bill ratios further underscore the sector's long-term growth prospects and revenue visibility. Key facts:

₹10-lakh-crore domestic defence pipeline takes shape

Program Name	Value (₹ lakh crore)	Key Beneficiaries
Next Generation Destroyers (P18)	1	MDL, L&T, SAL, BEL, BDL, Brahmos, Godrej Aero, BHEL
Next Generation Frigates (P-17B)	0.7	MDL, GRSE, BEL, BDL, L&T, Premier explosives
P75 Submarines	0.75	MDL, BEL, Astra, Apollo Micro Systems, BDL, L&T
Quick Reaction Surface to Air Missiles (ALH Dhruv) & Do-228 Upgrade	0.3	BEL, BDL, Astra, Ashok Leyland, L&T
Mine Counter Measures Vessels	0.44	HAL, BEL, Data Patterns, BDL
Landing Platform Docks	0.35	L&T, Cochin Shipyard, BEL, Astra
Future Ready Combat Vehicle (FRCV)	1.5	Paras, TATA, L&T
LCA Tejas Mark 2	1	HAL, BEL, BDL, Data Patterns
Multi-Role Fighter Aircraft (MRFA)	1.2	Tata Advanced Systems & Dassault Reliance
Super Sukhoi Upgrade (Su-30 MKI)	0.6	HAL, BEL, Astra Microwave, Data Patterns

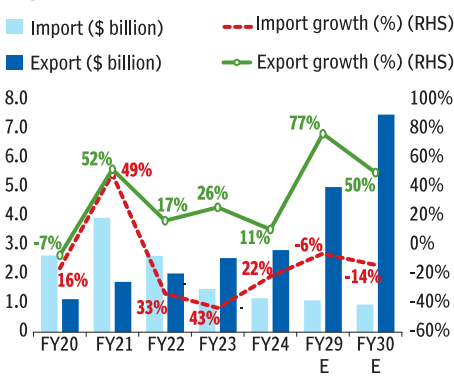
India's defence spending still has room to climb

Budget allocation is expected to rise from 2% to 2.5% of GDP by FY30

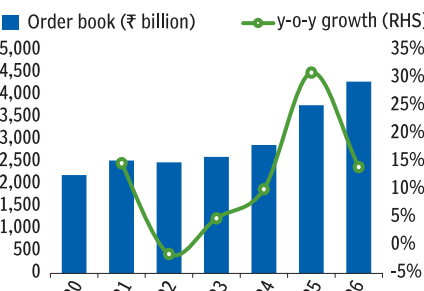


Source: Ashika Stock Broking

India's exports accelerate as import dependence declines



Defence order books signal long-term growth



thehindubusinessline.

TWENTY YEARS AGO TODAY.

September 2, 2006

Tarapore panel for 3-phased road-map towards free float

A quick winddown of Participatory Notes has been suggested by the Tarapore Committee on fuller capital account convert ibility while favouring a three phased road-map towards free float. The report made public by the RBI is of the view “that FIs should be prohibited from in vesting fresh money raised through PNs. Existing PN-holders may be provided an exit route and phased out complete ly within one year.”

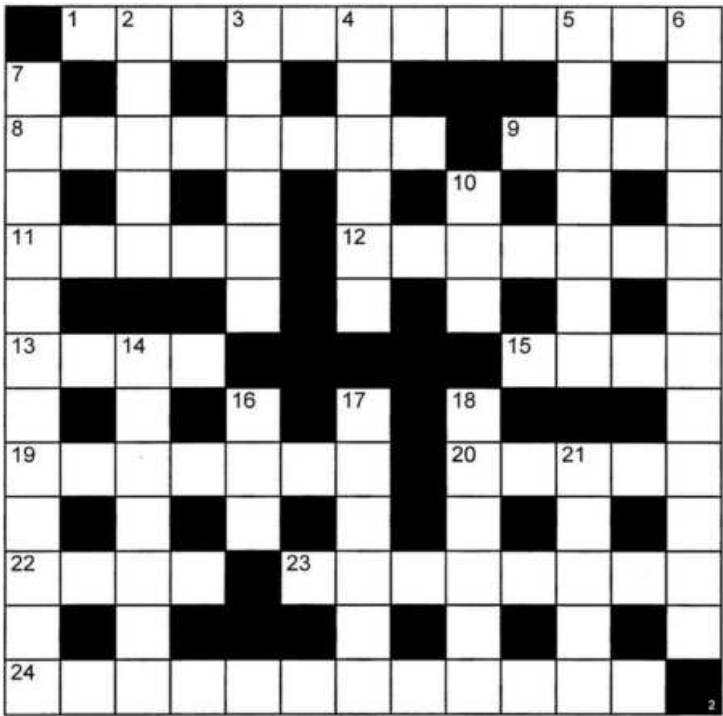
Big jump in individual I-T returns filed this year

The Government's extensive advertisement campaign has paid off. This year over 1.26 crore individuals have filed their income-tax returns as opposed to 77 lakh who had filed returns last year. Incidentally, the facility to file returns through post offices was also used by people this year to file returns.

Petro product prices unlikely to be raised now

Consumers of petroleum products – petrol, diesel, cooking gas, and kerosene – may be spared an immediate price hike with the Indian crude basket floating below \$70 a barrel. The basket on August 31 stood at \$66.61 per barrel and the average of April to date stood at \$68.77 a barrel.

BL TWO-WAY CROSSWORD 2727



EASY

ACROSS

- Dubious (12)
- To provide with an engine (8)
- Bar on guitar fingerboard (4)
- Ahead of schedule (5)
- Hopelessness (7)
- Move about listlessly (4)
- Large, predatory gull (4)
- Not this one nor that (7)
- Meat served in rashers (5)
- Orderly (4)
- Dislike, hatred (8)
- Large marine animal (8,4)

DOWN

- Out-and-out (5)
- Wanders away from the pack (6)
- Interior part (6)
- Make hostile show by ironic cheering (7)
- Having guests (12)
- Transitoriness (12)
- Put a question (3)
- A bishop or archbishop (7)
- Shrinking from notice (3)
- A coward (6)
- The candytuft genus (6)
- Porcelain (5)

NOT SO EASY

ACROSS

- Doubtful about quiet son able to change into it (12)
- Some trio with the potential to give engine power to it (8)
- Bar where, to some extent, the bitter flows backwards (4)
- Is in good time to organise the relay (5)
- Lose hope of getting praised for it (7)
- Be listless about a work of music, me? (4)
- Bird that sounds as if it might get stuck into meat (4)
- Is not one nor the other of three in a muddle (7)
- Essayist brought home by a breadwinner (5)
- It's tidy, the way native leader will take his meal (4)
- Dislike varies, perhaps, but there's no comeback (8)
- Jumbo sale organised by this denizen of the deep (8,4)

DOWN

- The complete way to give voice to something (5)
- As they've wandered off, the SAS try to sort them out (6)
- Is doing time in a team (6)
- To cheer ironically at the legal profession is torture (7)
- It may be amusing, having people in one's home for a meal (12)
- Mean men price it differently if it's of transitory quality (12)
- Invite one to pose a question (3)
- Top man in church is an ape (7)
- How bashful is Aunt Sally? (3)
- Giving carbon to a bird is cowardly (6)
- One Serb could hold about one candytuft (6)
- Sort of tea plate for a mate (5)

SOLUTION: BL TWO-WAY CROSSWORD 2726

ACROSS 1. Stitch 8. Trail 9. Consult 11. Delicate 12. Snack 15. Loss 16. Wig 17. Easy 19. Singe 21. Respects 24. Enliven 25. Swell 26. Winter

DOWN 2. Thorn 3. Test-case 4. Hold 5. Strip 6. Maya 7. Blue 10. Terminate 12. Sale 13. Sedition 14. Lyre 18. Belly 20. Geese 21. Rust 22. Stew 23. Snow

{ OUR TAKE }

Making the SCO work for India

The handshakes at summits are important, but of bigger significance is what they lead to

As Prime Minister (PM) Narendra Modi returns from the Shanghai Cooperation Organisation (SCO) summit at Bishkek, Kyrgyzstan, marking the 25th anniversary of the regional grouping, there are three issues that need deliberation. Making a strong statement on ending terrorism, with Pakistan's PM in attendance, Modi has managed to highlight India's priorities during the summit which remains, at its core, a forum of duelling objectives. Although Central Asia has witnessed enough terror-linked activity to set up Regional Anti-Terrorist Structure (RATS) in Tashkent, member-specific concerns have received inadequate attention.

The first issue the government, therefore, must worry about is that the institution still lacks a centralised consensus. Not only this, the asymmetrical dominance China enjoys in the grouping greatly influences any emergent consensus. Any statements or initiatives underscoring India's concerns are unlikely to be universally acceptable to the members. If another member State is implied to be the source of concern, the chances of organisational inertia are likely to be exponentially higher.

Second, a dispassionate assessment of whether the SCO and similar platforms, despite the dominance of one country, serve India's interests must be undertaken. In the past one year, the SCO has offered space for India and China at least twice to press reset in the bilateral relations. India has also used the grouping to expand trade relations with central Asian countries. The latest uranium deal with Uzbekistan is an example of how the government's "extended neighbourhood" policy has been bolstered through regular engagement — offered by the SCO — with a region rich in critical minerals.

Third, does a regional grouping offer a pathway into a larger geopolitical schema for a middle-power such as India? To be sure, the SCO was intended to challenge the US hegemony and offer an Asian alternative. As India retains its strategic autonomy by staying non-aligned to any geopolitical bloc, optimising regional groupings is a way forward for asserting the same.

The handshakes at summits are important, but of bigger significance is what they lead to. The SCO, in that sense, has prepared a solid ground for the upcoming BRICS summit in India. At a time when India and China are engaged in finding mutually agreeable solutions for the long-rankling issues along the Line of Actual Control, the importance of cordial meetings between the leaders of the two countries, even if not bilateral, cannot be understated. It is these opportunities that the government must build on.

A fail-proof tactic called Lionel Messi

At the head of every football World Cup, the coaching staff of participating teams dig deep in an attempt to find the perfect combination of tactics and talent. Except Argentina. They did things differently because they had Lionel Messi — the talent and the tactic, all rolled into one. The 39-year-old's retirement from international football marks the end of an era in which where Argentina employed a simple tactic: give it to Messi.

It worked, too. Affectionately known as "La Pulga," or "The Flea" in Spanish, Messi played 34 matches over six World Cup tournaments, scoring 21 goals and 12 assists. Of these 21 goals, 15 came in the last two tournaments where Argentina finished as winners (2022) and runner-up (2026). This is important because it is also when, under manager Lionel Scaloni, they decided to hand over the fate of the national team to the genius of Messi.

During his long club career at Barcelona, Messi showed that he could be part of the system. But if you wanted to know how things would be if the system worked for Messi, then Argentina was the team to watch. Other teams have tried to build their system around a star but that approach has limitations. Somehow, these limitations didn't apply to the man from Rosario. Teams could keep him at bay for most of the game but then just the tiniest of slip-ups would allow Messi to conjure a magical moment to propel his team to victory. It is what made us fans of Albiceleste, a Spanish term that translates to "the white and sky blue". It is what made us fans of Messi. It is what made us fans of the beautiful game.

Arabian Sea as a new laboratory for the US

A new weaponisation of the Arabian Sea will have geopolitical as well as geo-economic impact for multiple States beyond the Gulf

The Mecca defence agreement signed by Saudi Arabia, Türkiye, and Pakistan caused ripples both in the West Asia and the wider strategic discourse. While many perhaps erroneously believed that this agreement had Iran in its crosshairs, it may, in fact, align with the security vision Tehran is pushing via its ongoing chokehold over the Strait of Hormuz.

For some time now, Iran has been pushing for a region-led and region-owned security architecture that displaces the US military presence in the region, off-loads American military bases, and vests the onus of regional security in the Islamic countries. The abrupt exit of the US aircraft carrier, USS Abraham Lincoln, after a record seven-month long deployment to support US war effort against Iran — following reports of porting living conditions on-board the massive vessel due to the lack of access to the US Navy's bases in the Gulf — highlights the challenges the US faces in maintaining its military presence in the region. Prior to the war against Iran, Gulf

States had disallowed the US from launching strikes using their territories, and Al Udeid, America's largest military facility in the region, housed by Qatar, was emptied out. Other bases and assets, including those in Jordan and Bahrain, suffered significant damage from Iranian fire. "Are America's vast Gulf bases worth rebuilding?", read a recent headline in *The Financial Times*. The conversation on "de-basification", today, is real.

To sure, the US is not leaving West Asia. However, the nature of its future presence is going to be reimagined by its allies in the region. This raises further questions, such as at what cost does hosting a US military facility bring compared to the benefits? There remains palpable anger in the Gulf States, of which targeting American facilities will be seen as a successful strategy should US presence in the region thin out in the coming months and the Gulf States' unwillingness to be unwilling, to host, without iron-clad guarantees on defence.

This opens an interesting question. If not probability, vis-a-vis the Arabian Sea: Can it become a new stage for American military might?

American security calculations in the Indian Ocean, over the past few years, concentrated on the Indo-Pacific and new formulations such as Quad — the broader idea was to build a front against China's unfettered military and economic rise. The People's Liberation Army Navy (PLAN) already has three commissioned, indigenously built aircraft carriers as of 2026. As of the middle of August, none of US Navy's 11 nuclear-powered aircraft carriers were in Asia. Now, a shift in the future could see the Arabian Sea taking much more space in how the US deals with Iran, the Gulf, and Hormuz. Previously, the US has conducted long-range bombing missions against Iran from as far away as Australia. In March, the UK accused Iran of attempting to attack Diego Garcia, a joint US-UK base in the Indian Ocean where American long-range bombers such as the B-52s, B-1Bs, and the stealth B-2s are often stationed.

Both the Strait of Hormuz and the Bab Al-Mandeb Strait off the Red Sea open into the Arabian Sea. Over the course of the war, commercial vessels became a target for leverage well beyond these chokepoints. While such attacks taking place deep in the Sea have gone down in numbers, these shipping lines stand weaponised at a moment when there remain no international consensus on who is



Kabir Taneja



The US is not leaving West Asia. However, the nature of its future presence is going to be reimagined by its allies in the region.

APRILUS NAVY

supposed to protect or deter this business. The US remains the only military capable and willing to do so, for its own interests, but President Donald Trump has made this transactional — that is, regional countries must come and join the operations or lose out. In part, the international system is also at fault, having allowed an addition to American security blankets to get built. It was so in Afghanistan till 2021, and now on display again in West Asia.

A new weaponisation of the Arabian Sea will have geopolitical and geo-economic impact for multiple States beyond the Gulf. The India-Pakistan dynamic is already dealing with a peripheral spill-over from the Mecca agreement and the dividends from Islamabad's weakened yet persistent play as a mediator between Washington and Tehran. Any realignment of US military presence, aimed at using the Arabian Sea in the long term to contain Iran and circumvent

ing the incoming complexities of on-hand bases, will cause concerns in capitals such as New Delhi. India does hold significant naval power and influence in these waters and a challenge to that from the US, even as a partner State, would be fundamentally against the country's regional and neighbourhood foreign policy designs.

The question of the future of the Arabian Sea, not just the Indian Ocean, in US calculations is, of course, one of conjecture. However, it is an option and has been minimally utilised during the ongoing crisis and in the past as well. With the world going through major shifts and chaos, the immediate future will be one of a strategic trial and error, and the Arabian Sea could be a laboratory.

Kabir Taneja is the executive director of the Observer Research Foundation, Middle East. The views expressed are personal

Unnecessary surgeries & procedures in India

Gallbladder removal or cholecystectomy is among the most commonly performed surgeries in India. A 2026 BMJ Public Health review by Mohite et al., estimated that about 32 lakh cholecystectomies were performed in India in 2022 alone. Extrapolating from these estimates suggests that nearly 18 crore people may have undergone this surgery, during the five-year period from 2021 to 2025. India doesn't have a comprehensive national registry of surgeries. Cholecystectomy is often considered a tracer procedure for excess and unnecessary surgeries in India. The implications for patients are important.

Gallbladder removal is, in most cases, performed because of stones in its lumen. These stones, called gallstones, are the hardened deposits made of cholesterol or bile pigments. The risk of developing gallstones rises with age, genetics, obesity, rapid weight loss, including from weight-loss medicines, pregnancy, hormonal factors, and metabolic patterns. Yet most gallstones never cause symptoms. They are incidental findings during an ultrasound performed for fatty liver, acidity, abdominal discomfort, urinary complaints or an annual health check-up.

A diagnosis of gallstones does not automatically require surgical removal. International guidelines recommend observation for asymptomatic gallstones when stones are otherwise normal. Surgery is beneficial when stones cause repeated biliary pain, acute inflammation, bile-duct obstruction or pancreatitis. Preventive removal may be considered in selected high-risk situations. For the average person with an incidental, symptom-free stone, however, wait-and-watch is the appropriate approach.

Actual surgical practice in hospitals in India is very different. Once an ultrasound report reads "multiple gallstones", a nudge towards surgery is often given. The patient worries that a stone may suddenly become dangerous. The procedure is usually laparoscopic, widely available, requires a short hospital stay and is often covered by health insurance. Together, these factors make surgery feel safer even when doing nothing is an equally effective option.

This is where a clinical question becomes a health-system question. Much of India's corporate health care operates through a fee-for-service model. Hospitals earn from investigations, admissions and procedures. Health insurance packages can reinforce these incentives because reimbursement is easier to define for an operation than for observation, counselling, and follow-up.

This does not mean doctors or surgeons operate with bad intentions. Cholecystectomy is an excellent operation when medically indicated. Yet systems influence clinical thresholds. When financial, institutional and psychological incentives point towards intervention, while almost none rewards restraint, unnecessary treatment and surgery can become easier without anyone consciously deciding to overreact.

Then, surgery, or any procedure on the human body, is never without risk. Laparoscopic cholecystectomy is no exception, but complications can include bleeding, infection, anaesthetic problems and bile-duct injury. Some patients experience abdominal pain, indigestion or altered bowel habits after gallbladder removal. These risks are accept-

able when surgery relieves recurrent pain or prevents complications. That is why one should not rush to remove the gallbladder at the first diagnosis of gallstones.

Gallbladder removal is only one example. India has very high Caesarean-section rates, particularly in private hospitals. Unnecessary hysterectomies among low-income and rural women have prompted government concern, media attention and ethical questions. Similar concerns surround angioplasty, stenting in stable coronary disease, spinal fusion for uncomplicated back pain, knee replacement before conservative treatment, some appendectomies and tonsillectomies, and endoscopies or scans that may never alter treatment. Many of these interventions are lifesaving or life-changing. The issue is the threshold at which they are offered.

Health care once usually began with symptoms. A patient became unwell, visited a doctor and was investigated. Over the last two decades, with the growth of corporate hospitals, that sequence seems to have reversed. Healthy people are tested and investigated, the risk factors are treated as full disease, and a health package produces an abnormality that gives the person a disease label. The label creates an anxiety, generating specialist visits, repeat tests, medicines and sometimes procedures.

Over three decades, India's hospital sector has expanded almost alongside another booming industry: ultra-processed food. We are consuming more of both fast food and fast medicine. Both are sold as convenience and are mistaken for economic progress and societal development. In fast medicine too, the sequence is business-first: client, test, diagnosis, prescribe, and operate.

India needs advanced diagnostics, skilled specialists and excellent surgeons, but it also needs slow medicine. Slow medicine does not mean delaying necessary care. It means moving quickly when treatment clearly helps and proceeding deliberately when evidence supports observation. It values clinical judgment, continuity, explanation, second opinions and informed consent. It asks a question modern health care often forgets: What is likely to happen if we do nothing?

Reports of unnecessary surgeries and procedures appear regularly in India, yet the country lacks a national system telling us precisely how many elective operations and procedures are performed, and how many were truly necessary. Better data, smarter insurance design and stronger primary care are essential to halt and reverse this trend.

India's health care challenge is not merely to learn how to do more. A mature health system must value restraint as much as intervention. The best doctor is sometimes the one who explains why an operation is unnecessary and convinces the patient to wait. It is not only how to operate, but when not to.

Patients and families have a role too. Many patients want, demand or seek to get surgery done. Before an elective procedure or intervention, every person should ask: Do I truly need this now? In medicine and surgery, progress is measured not only by how much we can do, but by how wisely we know when to stop.

Chandrakant Lahariya is a practising physician and author of "Pill-Free: You Don't Need Every Thing You Have Been Prescribed". The views expressed are personal

MASOUD PEZESHKIAN | PRESIDENT, IRAN

If the US returns to its commitments in the aforementioned Memorandum of Understanding, the Islamic Republic of Iran will immediately reciprocate

Remarks made during annual SCO Summit



A neighbour's view of India's strategic strengths

As India marks eight decades of Independence, its strategic position has changed almost beyond recognition. Yet the central question of strategic autonomy remains. What India chooses to do with the strategic freedom it has built over eight decades may be the defining question of its next phase.

India has spent the past decade expanding its strategic choices — deepening ties with the US, Europe and Japan while maintaining important ties with Russia and strengthening engagement with the Gulf, Africa and Southeast Asia. Australia and New Zealand are also becoming increasingly important partners in the wider Indo-Pacific. At the same time, India has sought a larger voice for the developing world in international institutions. Strategic autonomy has traditionally been understood in diplomatic terms: the ability to maintain freedom of action without being drawn into competing power blocs. In an increasingly interconnected world, however, that freedom will depend just as much on economic and technological interdependence.

The objective should be strategic interdependence — building sufficiently diverse relationships that dependence on any one country or economic system does not become a vulnerability. India is unusually well placed to pursue this. Its geography connects the Gulf and wider West Asia, the manufacturing economies of Asia, Africa across the Indian Ocean and the Eurasian space extending through Russia. The opportunity, therefore, is to become a connector between economies increasingly fragmented by geopolitical competition.

India's relationship with Japan, extending into advanced manufacturing, technology, energy, semiconductors and critical minerals. Its engagement with the US is deepening across technology, investment, advanced manufacturing, energy and strategic cooperation, while its engagement with Europe is becoming increasingly economic and technological. Its relationships with the Gulf are expanding beyond energy into investment and connectivity. Australia and New Zealand add an important southern dimension to its wider Indo-Pacific engagement, while Southeast Asia provides pathways into wider Asian production networks. Russia remains an important part of this equation. India's continuing engagement with Moscow, alongside its deepening relationships with Washington, Tokyo, Europe and the Gulf, creates a unique strategic autonomy gives India the flexibility to maintain important relationships across geopolitical divides.

China inevitably occupies a special place in this landscape. India's answer cannot be either excessive dependence or complete separation.

It will require strengthening domestic capabilities, diversifying supply chains and building partnerships elsewhere, while retaining space for engagement where interests permit.

India possesses another asset that few countries can match: a large, globally active and diverse diaspora. Yet the diaspora can also present challenges, as political currents within these communities do not always align with India's interests and can occasionally create sensitivities in its relations with host countries. The greater one connects together in the economic, intellectual and cultural connections the diaspora can create, while respecting its diversity and independence. In the emerging global economy, countries will increasingly seek multiple sources of energy, technology, capital, minerals and markets. India can contribute by helping create an open network rather than another exclusive bloc.

Ports, shipping routes, energy corridors, digital infrastructure, supply chains and trade agreements increasingly shape strategic influence. India's challenge is to ensure these strands together without turning them into a closed sphere of influence.

India's economic rise will be more sustainable if other countries see themselves as participants in its growth rather than simply as markets for it. The value for India lies in making these relationships complementary rather than choosing among them. India's leadership of the Global South can now great beyond representation in international forums towards creating an international economic environment in which developing countries have greater choices. India's own experience is relevant here. It has moved from a relatively closed economic model towards deeper global integration while retaining a strong emphasis on domestic capability. The lesson is that openness and strategic autonomy are not contradictory.

As the G20 meets again in Miami in December, India can continue to argue that the Global South should not merely seek greater representation within existing institutions, but a greater stake in shaping the economic networks and institutions of the future. An economically integrated Indian Ocean could allow countries such as Sri Lanka, Bangladesh and the Maldives to participate more deeply in regional supply chains, logistics, energy, tourism, technology and services. Influence based on shared prosperity is more durable influence based on dependence. India's strategic opportunity, therefore, lies in becoming one of the principal connectors of a changing world.

Millinda Moragoda is a former cabinet minister and diplomat from Sri Lanka. The views expressed are personal

Editor's

TAKE

The Russia embrace, recalibrated

As the two leaders reaffirmed their commitment to a relationship tested by war and sanctions, India made clear that its ties with Moscow remain important

When Narendra Modi and Vladimir Putin embraced on the sidelines of the Shanghai Cooperation Organisation summit in Bishkek on August 31, it was the image both governments wanted the world to see: warm and familiar, unbothered by the past year's turbulence.

Their bilateral meeting – the first face-to-face encounter since Putin's visit to New Delhi last December – was brief by diplomatic standards, but its symbolism travelled further than its substance.Modi's message was carefully calibrated. "We must move away from endless war towards an end to the war," he told Putin, adding that "every day spent in war sets humanity back." It was a restatement, four years on, of the line he delivered at Samarkand in 2022: "today's era is not an era of war." Putin, for his part, reached for language both sides have used since 2010, calling the relationship a "special and privileged strategic partnership," and thanked Modi for his "personal attention" to it.

Modi used the occasion to invite Putin to New Delhi in September for the BRICS summit, keeping the calendar of contact dense even as the war in Ukraine grinds on. The meeting is being called significant less for what was announced than for what it confirmed: that Washington's year-long campaign to prise India away from Moscow has not worked as intended. Donald Trump's decision last August to push tariffs on Indian goods to 50 percent, explicitly citing its Russian crude purchases, was the most direct pressure an American president has applied to India's Russia policy in decades.

Tariffs came down again in February after signals that Indian refiners would scale back, and imports did fall for much of the last fiscal year. But the rebound has been telling: Russian crude buys climbed again this spring, pushing bilateral trade up more than 50 percent for the quarter, oil doing almost all the work while Indian exports stay barely visible on Russia's books.That imbalance is the honest picture of where the relationship stands today.

Two decades after Moscow was India's default partner on everything from fighter jets to nuclear plants, the tie is now narrower and more transactional: discounted crude and fertiliser, spares and maintenance for a legacy defence inventory built around the S-400 and Soviet-era platforms, safer rupee-rouble payment channels to dodge sanctions, and a \$100-billion trade target both sides keep restating without a credible path there. Where this heads will be decided as much in Washington and Beijing as in Moscow or Delhi.

India's simultaneous thaw with Xi Jinping at the same summit – itself partly a by-product of Trump's tariffs – gives New Delhi more room to treat Russia as one hedge among several, not a pillar.

Moscow, meanwhile, has grown steadily more dependent on Beijing, leaving it less able to reciprocate India's balancing act than before. The Bishkek embrace was genuine enough. But it described a friendship being managed in a crowded field, not one being restored to the centre of India's foreign policy.

The American dream, under a visa siege

Despite the tightening of visa rules — and even as courts push back against some of the administration's measures — the pull of the American Dream remains remarkably strong



KALYANI SHANKAR

The Trump administration aims to reform the immigration system and tighten immigration rules. As part of this, it plans to pause certain immigration visas and pause visa processing. During his second term, the Trump administration has paused or rescheduled visa appointments at US embassies and consulates worldwide. This affects individuals seeking to travel to the US for work, study or family visits.

The administration aims to cancel B1/B2 visas for 200,000 asylum seekers. Since taking office, it has cancelled over 175,000 visas for foreign citizens for a variety of reasons, according to the State Department. This visa pause impacts 75 countries.

The suspension of specific visa categories has created challenges and uncertainty for many foreign nationals, particularly those from India. This decision has raised concerns for families, workers and students who rely on these visas for various opportunities in the United States.

However, last week, the US resumed issuing immigrant visas to people from 75 countries after a long pause. This change followed a federal court ruling against the visa pause, which began in January to screen applicants who might require more public benefits in the US. This is part of a larger plan to train diplomatic staff globally to enhance the efficiency and effectiveness of US diplomatic operations.

Currently, nearly one million Indians are stuck in the US employment-based green card backlog, representing about 79 per cent of those awaiting approval in the first three categories. An analysis by the National Foundation for American Policy suggests that Indian nationals filing applications in January 2026 or later could face waits of 179 years for EB-2 and 38 years for EB-3 permanent residence.

This is part of a larger plan to train diplomatic staff at posts worldwide. The goal is to make US diplomatic operations more efficient and effective.

The administration is also cracking down on birth tourism, where foreign pregnant women travel to the US to give birth, thus gaining birthright citizenship for their children. Trump has tried to end this practice; however, the courts, including the Supreme Court, have consistently rejected his efforts.

The State Department has announced modifications to visa appointment schedules to support consular officer training. This



THE SUSPENSION OF SPECIFIC VISA CATEGORIES HAS CREATED CHALLENGES AND UNCERTAINTY FOR MANY FOREIGN NATIONALS, PARTICULARLY THOSE FROM INDIA. THIS DECISION HAS RAISED CONCERNS FOR FAMILIES, WORKERS, AND STUDENTS WHO RELY ON THESE VISAS FOR VARIOUS OPPORTUNITIES IN THE UNITED STATES

The writer is a popular columnist

training aims to help officers better identify visa applicants who may rely on US public benefits and ensure a thorough, consistent evaluation of all visa applications.

The US visa system plays a crucial role in enabling international travel, work, study and family reunification. The government has temporarily paused processing certain visa types, including Temporary Work Visas (H-1B), student visas (F-1) and family-sponsored visas, as part of efforts to improve visa management. This is a challenging time for many individuals from India and other countries, and these changes are expected to streamline the process moving forward.

Students planning to study in the US are feeling the impact of this uncertainty regarding their visa status, which complicates their enrolment in academic programmes and may force them to re-evaluate their educational plans entirely. The ongoing suspension of visa processing is causing significant issues for families. Many Indian nationals have relatives in the United States waiting for green cards or other immigration assistance, leaving these families uncertain and facing both emotional and practical challenges.

Maintaining familial connections across international borders is difficult, especially during significant life events. India is currently facing major challenges due to recent changes in US policy.

Other nations, such as China, Mexico and the Philippines, which have many citizens living in the United States, are also affected by these changes. As globalisation con-

nects economies and cultures, these policy changes could significantly impact international relations and economic cooperation.

There is a growing call for immigration reform. As people and families navigate this uncertainty, they need robust policies and support systems more than ever.

Immigrant rights advocates and other organisations are working to improve the US visa process. They aim for the government to recognise the challenges individuals and families face and create easier pathways to obtain visas.

Additionally, the Trump administration plans to revoke the visas of approximately 200,000 foreigners who entered the country for tourism or business but sought to extend their stay by applying for asylum.

Earlier this week, the Trump administration began reviewing a new proposal to overhaul the H-1B visa programme, signalling another potentially significant change to the employment route used by thousands of Indian professionals. This proposal could impact the US economy by at least \$100 million annually.

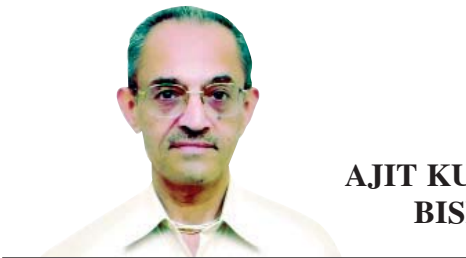
Ongoing advocacy and reforms are essential to ensure that the immigration system meets the diverse needs of individuals seeking opportunities in the United States.

Recently, US courts have limited some of the Trump administration's measures, including a federal judge's ruling that overturned a previous decision. But all these have not made the aspirants pull back or stop; they continue towards the completion of their "American dream".

PIC TALK



A worker sorts jute fibers from harvested stalks near a waterbody, in Nadia district, West Bengal, PHOTO: PTI



AJIT KUMAR BISHNOI

2ND OPINION

Yes, I am referring to the famous verse 2.47 of the Bhagavad-Gita. There are four instructions in this verse. The first instruction is: "You have a right only in action." Lord Krishna is talking about what we do with our mind, words and body. In the spiritual language, these must be our duties, including to self as a soul, to family, nation, etc. And the right is what is within our control as a soul. We can act as we wish, exercising our free will, but the result is not in our hands.

Recently, I was faced with a serious problem; our company's income tax return had come under scrutiny. We were asked to submit supporting evidence of the expenses, and they gave a date by which to submit them. It was a monumental task of transmitting all the expense vouchers. We consulted tax experts. They all



advised taking their shelter and, of course, giving a very fat fee to manage this problem. After giving the matter serious thought, we decided to take the pain part; we began transmitting the information sought by them. To cut a long story short, we managed to transmit all the supporting evidence, as sought by the tax authority. Still, the result was not in our hands, whether they would be satisfied or not. To the relief of all and surprise of the so-called tax experts, we got a no-dues acknowledgement. This brings us to the second instruction of Lord Krishna,

which is: "Not ever in determining its fruits/result." The question naturally arises, then, about who decides the results. The answer lies in the 'Karmaphala Principle', which is: "What you sow is what you reap." God has set up a Divine Authority under His superintendence to shoulder the responsibility of deciding the results of our 'karmas' (deeds). They take all relevant factors into consideration and decide. Therefore, all decisions are, in effect, made by God only.

And God is perfectly just in awarding them. The result belongs to the person concerned, and no one else; he must get it. A wrong impression is prevalent that the fruits of our acts don't belong to us. This is farthest from the truth. God does not need these fruits. Doesn't He own everything? What happened in the income tax scrutiny? We exercised our right to act, and the result was given to us. We had also obeyed Lord Krishna's instruction of not trying to manipulate the fruit of action. And we also did not disobey the Lord's fourth instruction: "Your attachment to inaction also should not be there." We painstakingly did our duty.

The conclusion is: We all have a right to do our duties, which is the only right we have. Results are not in our hands. We should do our duties, and neither try to manipulate the results nor be inactive. Then, we will be rewarded suitably; we can be sure of it; God has arranged it.

The writer is a spiritual teacher and columnist

STRONG GDP GROWTH MUST TRANSLATE INTO INCLUSIVE PROSPERITY

India's 7.8 per cent GDP growth in the first quarter of 2026-27 is welcome news at a time when the global economy faces geopolitical disruption, uncertain trade policies and volatile energy markets. The outcome reflects the underlying strength of domestic activity rather than mere statistical comfort. Manufacturing expanded by 9.2 per cent, construction by 7.7 per cent, and financial, real-estate, IT and professional services by 12.1 per cent. These figures show the beneficial effects of public infrastructure spending, improving industrial activity, credit availability and sustained demand for services. However, celebration should not turn into complacency. Agriculture grew only 3.6 per cent, while mining contracted. Any weather disruption later in the year could weaken rural incomes, farm output and food-price stability. Further, higher crude-oil prices,

conflict-linked supply disruptions, a weaker rupee and protectionist trade measures can enlarge India's import bill, revive inflation and hurt exports. Growth led by capital-intensive sectors and government-supported construction must be accompanied by enough productive, formal and adequately paid jobs. Private investment needs to broaden beyond a few sectors and large companies.

The policy task, therefore, is to protect macroeconomic stability while sustaining public capital expenditure and encouraging private investment. Better farm productivity, urban employment, skilling, export competitiveness and targeted support for MSMEs would make growth more inclusive and resilient. This will also help sustain investor confidence, protect household purchasing power and support stronger growth over time.

BAL GOVIND | NOIDA

Please send your letter to the info@dailypioneer.com. In not more than 250 words. We appreciate your feedback.

LETTERS TO THE EDITOR

Haldwani narrative undermines its credibility

Apropos, "BJP slams Rahul Gandhi over Haldwani FIR row," The Pioneer, Sep 1. The Congress party's mounting desperation was clearly on display in Haldwani. Allegations by AICC President Mallikarjun Kharge and Rahul Gandhi — claiming right-wing activists performed a "purification ritual" to humiliate Kharge — are a blatant political attempt to target the BJP. Organisers at Haldwani's Ram Lila Maidan clarified that the ritual was purely symbolic. It was conducted to clean a venue left littered and polluted by hostile speeches and slogans during the event, with no casteist intent whatsoever.

Yet, Congress deliberately twisted this factual response into a narrative of untouchability to manufacture outrage. This tactic follows a clear pattern of a struggling party relying on false claims for electoral gain. In today's era of live streaming and instant checks, the public cannot be easily misled. By repeatedly pushing false and divisive caste rhetoric, Rahul Gandhi is not winning over voters. Instead, he is damaging his own credibility and exposing his strategy to the nation. Such conduct only deepens public scepticism and weakens Congress's credibility further ahead of future elections.

N SADHASIVA REDDY | BENGALURU

Messi bids international football goodbye

To the surprise of everyone, legendary football player Lionel Messi announced his retirement from international football last Monday. Messi made the official announcement on Instagram, confirming his decision to retire from Argentina's national team at the age of 39. From an accolade-decorated career to winning the World Cup, such a farewell is obviously hard to accept for his worldwide fan community.

Messi is not a champion for Argentina alone; he is a global star, with 125 goals in 207 games for the national team and a FIFA World Cup victory in 2022, Argentina's first in 36 years. Although this was Messi's second such publicly claimed retirement after 2016, his departure from international football will undoubtedly be an emotional moment for millions of fans worldwide. As global admirers of his remarkable career, his adieu from the game is definitely a hard goodbye. We hope that younger generations will cherish Messi's achievements, learn from his playing spirit and artistry, and carry his legacy forward in international football in the future. His journey will remain an inspiration for aspiring footballers across the world. His name will forever be remembered among the greatest to have played the beautiful game.

KIRTI WADHAWAN | KANPUR

Indus Waters Treaty needs a rethink

Apropos the news report 'India rejects Indus water ruling' (September 1), the Permanent Court of Arbitration's order on the Indus Waters Treaty raises important questions about the limits of international arbitration and India's sovereign rights. India's rejection of the ruling is understandable, particularly because New Delhi has consistently maintained that the court was constituted in violation of the treaty's provisions. The larger issue, however, is the future of the Indus Waters Treaty itself. Signed in 1960, the treaty has survived wars and prolonged hostility between India and Pakistan. Yet Pakistan's continued support for terrorism and its use of international forums to challenge India's hydropower projects have altered the strategic environment.

India's decision to keep the treaty in abeyance sends a clear message that agreements cannot be treated as one-sided obligations when broader relations have deteriorated. At the same time, New Delhi must ensure that its actions remain technically, legally and environmentally defensible. Water is a strategic resource, especially for Jammu and Kashmir. India should therefore pursue its legitimate rights under the treaty while accelerating hydropower development and maintaining diplomatic pressure on Pakistan.

VANDANA | CHANDIGARH

YSR’s legacy lives on: Jagan’s journey from welfare to empowerment

Seventeen years after the untimely death of YS Rajasekhara Reddy, his political legacy continues to be defined not merely by welfare schemes but by a larger idea of governance: that social justice must translate into tangible economic security, opportunity and dignity



APPALA RAJU SEEDIRI

the largest in the social sector, and every family claimed him as their own.

During his gruelling padayatra, he comprehended the needs of the common person. Farmers, women, youth, Backward Classes, the socially disempowered, and the economically vulnerable formed his foremost concern.

With these sections in mind, his government discarded the World Bank’s conservative playbook and came up with sweeping reforms across the power, agriculture, public health and higher education sectors. It is worth mentioning some of his salient schemes as we observe his anniversary today. The first government order he signed was to provide free electricity for agricultural use.

The second major relief measure that he extended to the farming community was to waive agricultural loans. He initiated massive irrigation schemes that changed the landscape of agriculture in the Telugu states and ensured that farmers had constant access to water throughout the crop seasons.

His Aarogyasri was India’s first public health insurance scheme, which ensured that the health needs of every vulnerable family were covered. He instituted the historic post-matric fee reimbursement scheme that provided every student with the government’s financial backing to pursue higher education.

The Backward Classes form the bulk of our state’s population. To reduce them to a mere social category does injustice to their massive contribution to our economy. They are our farmers, weavers, fishermen, potters, masons, small traders, skilled workers, artisans and those who form the service backbone of our society and economy.

When YSR assumed the stewardship of the state in 2004, Andhra Pradesh was not a welfare state. For the preceding nine years, the state, which was governed by the rulebook of neoliberal economics, withdrew from providing direct relief to its citizenry.

Recognising that social justice should not be limited to an abstract constitutional promise but must be anchored in material security and institutional access, he took up a slew of welfare measures.

For him, welfare was never charity but a precondition on which a state could promise its citizenry opportunities that would lead to upward social mobility. Thanks to the policies listed above, within the span of a generation, millions of families from otherwise socially vulnerable and economically deprived sections emerged empowered out of debilitating poverty.

When the YSRCP formed its government in Andhra Pradesh in 2019, our leader Jaganmohan Reddy believed that carrying forward his father’s legacy required a clear three-pillar approach to the empowerment of the Backward Classes: Welfare, Development and Leadership.

Our government provided direct support to BC households and traditional occupations. YSR Cheyutha provided 75,000 over four years to eligible women from BC, SC, ST and minority communities. YSR Nethanna Nestham ensured handloom weavers received 24,000 annually.

YSR Matsyakara Bharosa strengthened assistance to fishermen and offered financial support during those periods when fishing was banned. Through YSR Vahana Mitra, we provided financial succour to auto, taxi and maxi-cab driver-owners, while Jagananna Chedodu assisted tailors, Rajakas and Nayee Brahmins.

YSR Aasara provided relief to members of self-help groups and waived outstanding loans.

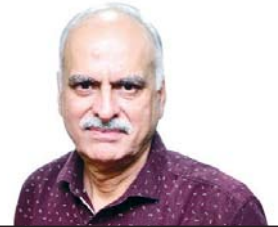
For the first time in the state’s political history, we created 56 corporations that addressed the needs of 139 communities that are listed under the Backward Classes.



HIS AAROGYASRI WAS INDIA’S FIRST PUBLIC HEALTH INSURANCE SCHEME, WHICH ENSURED THAT THE HEALTH NEEDS OF EVERY VULNERABLE FAMILY WERE COVERED. HE INSTITUTED THE HISTORIC POST-MATRIC FEE REIMBURSEMENT SCHEME THAT PROVIDED EVERY STUDENT WITH THE GOVERNMENT’S FINANCIAL BACKING TO PURSUE HIGHER EDUCATION.

OUR LEADER MR JAGANMOHAN REDDY’S PADAYATRA TAUGHT HIM THAT ECONOMIC ADVANCEMENT WITHOUT POLITICAL POWER IS INCOMPLETE. HE DECIDED TO CREATE A NEW GENERATION OF ORGANIC LEADERSHIP BY TRANSFORMING THE BACKWARD CLASSES FROM A VOTE-BANK TO DECISION-MAKERS

The writer is a former Minister for Fisheries, Animal Husbandry & Dairy Development, Government of Andhra Pradesh



ANIL ANAND

to become proactive, impressively and daringly raising political and societal issues. And above all, managing to establish a connect with the younger generation, or Gen Z, who have steadfastly stood behind Prime Minister Narendra Modi during the last one decade. Squatting on a dharna outside Parliament Street Police Station in support of a pellet-injury-hit youth is the latest in the series of steps in this direction.

The contrast between Gandhi’s high-profile individual outreach and the perception of a sluggish Congress party stems from deep structural decay, heavy reliance on a top-down (mostly defunct) leadership model, and disconnected regional hierarchies. When high-visibility campaigns fail to translate into organised local momentum, it exposes a disconnect between national optics and ground-level execution. This has repeatedly happened, but there is no attempt to learn lessons and set the house in order.

Despite his sensible interventions and thoughtful suggestions on vital national and international issues, Gandhi gives an impression of still being a loner in the GOP’s vast spread all over the country. That is strange enough. But why so? Does he himself need to reflect or change his approach towards the organisation by shrugging off indecisiveness? Shouldn’t he adopt a proactive approach to set the party and its leaders right, as he has been doing in his solo efforts? Firstly, he must follow the dictum suggested by none other than Gandhi himself. Pick up the right person for the right job with a strong rider of accountability. He needs to do this in the light of his observation that the party has been putting up the racing horse on the job to pull a cart and vice versa. Even before that, while on a visit to Gujarat, he had spoken about the BJP sleeper cells active in the state Congress (that scenario prevails in many states and Union Territories) and the need for heads to roll. It has been months now, but the follow-up action is still to come. The BJP and regional parties’ sleeper cells are thriving all over the Congress network.

An immediate follow-up action on such counts would have given Gandhi a decisive edge and created deterrence, thereby making it easier for him to tone up the organisation. Indecisiveness has portrayed his weakness; this attitude has emboldened those becoming roadblocks for the party to act more vigorously in internal sabotage. Indecision, reluctance to take hard decisions and the tendency to protect even the “failed horses” under the garb of being favourites of someone have become the Congress’s bane. It is hard to believe that Gandhi and other leaders are not aware of this malady. What is intriguing is that they are knowingly allowing such a situation to prevail at a greater cost not only to the party but to the nation as well, as it weakens the position of the country’s main premier opposition party in the overall democratic context.

A strong reason behind Gandhi’s “loner status” is that leaders around him in the AICC and PCCs have found a convenient way to shrug off their responsibilities and justify inaction by seeking refuge under the leader’s umbrella. “Rahul Gandhi naraz ho jayen ge (Rahul Gandhi will get annoyed)” is their usual refrain to justify not taking a decision in any particular situation. For instance, how could it be justified that it takes months, sometimes years, to make organisational changes at the AICC or the PCCs level? It is criminal negligence; firstly, a non-performing leader is allowed to continue and, secondly, the organisational set-up is given to him/her at a time when a change should have been effected, as a reward for non-performance.

A case in point is the sensitive and strategic Jammu and Kashmir, where Congress, being a national party, other than the ruling BJP, has an important role to play but is being prevented from doing so by organisational shortcomings which the high command refuses to remove. On the occasion of PCC president Tariq Hamid Karra completing two years in office, despite all the controversies he has courted due to his “style of functioning” and total lack of connect with the rank and file, the AICC in-charge Syed Naseer Hussain rushed to Kashmir to work on providing a new organisational set-up to him as a reward. This happened in the backdrop of a controversy germinating from Karra’s alleged non-appearance at the Independence Day function held at the party office.

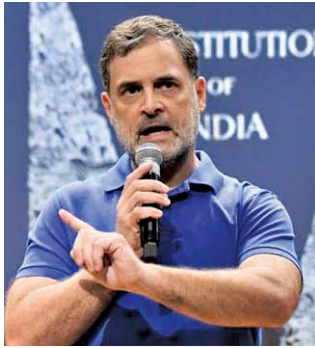
Shouldn’t completion of two years in office have been a stocktaking time, with Karra asked to present his report card? For that reason, any AICC or state/UT functionalities? Appointment or continuation in office shall be directly related to the performance of the incumbent, which should be the thumb rule from AICC down to PCCs.

Such a scenario prevails in many other states and UT units, with no sense of accountability attached anywhere. Apart from the states/UTs, another weak link is the nonchalant attitude of some top AICC office-bearers, particularly those made in charge of the states and UTs. In the absence of accountability, they are merely living in comfort zones, at times becoming Gandhi’s cheering brigade. This has become a convention, to be seen to be on his right side.

How best to use the services of ageing and well-entrenched regional and a set of national-level leaders is a daunting challenge for Gandhi, as these leaders are making the generational transition difficult. To tackle this situation, he needs to have a set of well-versed and trusted advisers rather than acting solo, which will also help in lessening over-reliance on brand Gandhi.

A classic case of this syndrome is at play in yet another sensitive border state of Punjab. The old guard in the state is feverishly working unitedly to thwart generational change, which has come in the form of Rahul Gandhi-loyalist PCC chief Amrinder Singh Warring, who, like Karra, has also completed two years in office. Serious factionalism has risen ahead of the 2027 Assembly elections. No doubt the old guard is taking undue advantage of the situation, but it is also a reflection on Warring’s functioning and ineffective handling by the central leadership. Such situations can only be tackled through quick and tough decisions. No matter if it involves removing a so-called loyalist in the overall interest of the party, as is the case in Jammu and Kashmir and Punjab.

The writer is a political analyst



When algorithms enter the field: What AI means for India’s small farmers



NEHA SEHRA | REETA SONY

While sowing, a farmer in India checks an agri-tech app that advises him to delay planting due to an expected dry spell. The advice is based on satellite imagery, historical rainfall data and machine learning models. But the rain arrives earlier and more heavily than predicted. The sowing window is lost, along with the seeds and other resources the farmer has invested. Stories like these are increasingly common as farmers rely on predictive tools and artificial intelligence (AI) to guide agricultural decisions. These technologies are promoted as one-stop solutions to climate uncertainties, stagnant yields and distress in the agriculture sector. Algorithm-based advice is presented as “informed decision-making”, influencing everyday decisions and raising a question: who benefits from agricultural algorithms and who should be held responsible when their predictions go wrong?

With advances in science and technology, agricultural practices have evolved. Traditionally, agriculture relied on human labour, animals and

knowledge of soils, seasons and risks. This was Agriculture 1.0, marked by modest productivity and dependence on traditional knowledge. Production increased sharply in the 19th and 20th centuries with Agriculture 2.0, driven by mechanisation and chemical fertilisers. But this came with a high ecological cost: greater dependence on agricultural inputs, falling groundwater levels and soil degradation. Information and communication technologies entered farming in the late 20th century, marking the advent of Agriculture 3.0. Precision farming, automated machinery and satellite monitoring became more common, while chemical use could be reduced. This paved the way for Agriculture 4.0, where data, algorithms and predictive models are increasingly used. AI systems use data from soil sensors, drones and weather forecasts to advise farmers on when to sow, irrigate, fertilise and harvest. Farming that once relied largely on experience is now increasingly guided by prediction.

India’s shift towards digital agriculture is driven by climate change, unreliable monsoons, extreme weather and pressure on limited land and water. Predictive analytics and AI tools are promoted as scientific solutions to raise farmers’ incomes, reduce climate risks and use resources efficiently. But agriculture is shaped by social, ecological and socio-political conditions, which AI cannot always capture. Predictive technologies run on data collected through mobile applications, sensors and other tools. This includes soil properties, crop images, yield patterns, weather records and farmer behaviour. Farmers generate this data con-



tinuously, often without realising it.

Farmers have less control over data generated from their fields. Most agri-tech firms, insurance providers and input suppliers have unclear data policies, offering little information on how data is stored, shared and utilised. Data collected from millions of farmers becomes a valuable asset for these firms, while farmers seldom benefit from it. Data-driven systems can influence farmers’ access to credit, insurance payouts or government schemes. This imbalance reduces farmers to data profiles rather than decision-makers. As knowledge moves from the soil to servers, authority shifts from those who work in the field to distant digital systems.

Predictive technologies rely heavily on past data to identify patterns and project them into the future. But climate change has unsettled these models. Erratic rains, prolonged heatwaves, unseasonal storms and shifting pest cycles mean historical data is less reliable. Most Indian farmers depend on rain-fed agriculture, where predictions

may fail to capture local differences. Yet digital advisories continue to be issued, leaving farmers to choose between the algorithm and their own experience. When predictions fail, the cost falls most heavily on smaller farmers, who are least able to bear the losses.

For generations, Indian agriculture has drawn on indigenous practices, community experience and ecological knowledge. AI systems, however, tend to favour data that can be measured and standardised, often overlooking local knowledge. Their advice may ignore differences in soil, cropping patterns and household circumstances.

This can sideline effective local practices and reinforce farming methods that depend heavily on external inputs. Farmers may feel pressured to follow these recommendations rather than adapt them to local conditions or learn from others in their communities. Over time, this could weaken their independence and increase reliance on software and off-farm inputs. Technology, therefore, does more than support farming. It can shape what counts as agricultural knowledge, how it is tested and how much value is placed on it.

One of the most critical concerns with introducing AI into agriculture is responsibility. Suppose an algorithm’s advice leads directly to crop failure; who should be held accountable - the app developer, data provider, government bodies promoting these platforms, or the farmer who acted on the suggestion? At the moment, there is little clear guidance. Most digital tools in agriculture lack systems for handling complaints or established rules about liability. Farmers are urged to trust

these systems, but when they fail, responsibility scatters and accountability goes missing.

Without transparency and safeguards, these technologies can shift the burden of managing uncertainty from institutions to individual farmers.

AI and predictive technologies are not inherently problematic. If developed and used responsibly, they can improve decisions, reduce physical burden and make better use of scarce resources. But they should support, not replace, farmers’ judgement and local knowledge. Data governance must recognise farmers’ rights over their data, backed by genuine consent and transparency. Public platforms and open systems can also provide an alternative to the growing dominance of private firms in agricultural data.

These technologies should also be part of wider efforts to promote climate-resilient and agroecological farming. They cannot be treated as miracle solutions to long-standing agrarian problems.

The future of Indian agriculture will depend not only on technology but also on the values and institutions shaping its use. Predictive tools can either deepen existing inequalities or help build fairer and more sustainable farming systems. The question is not whether India should use AI in agriculture, but how it is used and in whose interest. Without accountability, farmer participation and respect for ecological realities, “smart farming” may fail those who need it most.

Dr Nehra Sehra is a Research Associate at CSLG, JNU, and Reeta Sony is an Associate Professor at CSLG, JNU

The Statesman

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Beyond Victory

A hundred days is too short to judge a government, but long enough to understand its instincts. By that measure, the BJP's first months in power in West Bengal have revealed both the possibilities and the limits of regime change.

The change in political atmosphere has been unmistakable. A party that spent decades on Bengal's margins now governs with an authority that would once have been unimaginable. Institutions long identified with the Left-liberal political culture, most conspicuously Jadavpur University, have become arenas for an assertion of a new ideological confidence.

Chief Minister Suwendu Adhikari's language of nationalism and his challenge to what he calls a culture of intimidation underline a larger ambition: not merely to replace the Trinamool Congress in office, but to alter Bengal's political vocabulary. That transformation is easier to announce than to accomplish. Bengal's political culture was not created by Mamata Banerjee alone, nor will it disappear with her electoral defeat. Attempts to impose a new ideological consensus risk producing unnecessary confrontation where a democratic government should instead demonstrate confidence enough to accommodate dissent.

Yet it would be equally simplistic to dismiss the new administration as merely symbolic. The transfer of long-pending land for border infrastructure and efforts to reconnect Bengal with central schemes show how a change of government can unblock decisions stalled by political conflict. Industrial incentives and investment proposals point to a recognition that Bengal's real crisis is economic. Here lies the real test. For years, Bengal has suffered from the consequences of industrial decline, inadequate private investment and the outward migration of many of its most employable young people. These problems cannot be solved by renaming schemes, changing official symbols or winning ideological battles on university campuses. Nor can investment announcements be confused with factories, or memoranda with jobs.

The BJP inherited these structural difficulties. It cannot reasonably be expected to reverse them in 100 days. But its enormous electoral mandate has also removed the excuse of political weakness. The question now is whether it can convert the authority it has acquired into the administrative consistency investors require. There is a particular danger in confusing political conquest with successful governance. The destruction of an old political order is not the same as building a new economic one. Bengal has seen enough governments that were powerful in politics but disappointing in development.

The early months suggest a government energetic, ambitious and determined to leave its mark. Its strongest achievements so far have come where the executive's will can quickly remove obstacles. Its greatest promises, however, remain works in progress. That is not yet a failure. But neither is it a success.

The real measure of this government will not be how thoroughly it changes the symbols of power, but whether young Bengalis can eventually find reason to build their futures at home. Political victories are won at the ballot box. Economic renewal is earned much more slowly.

Owning tradition

Jewellery advertisement featuring actor Kriti Sanon has been withdrawn after criticism over her clothes while celebrating Rakshabandhan. What might ordinarily have been a forgettable piece of festive advertising instead became another argument about an unusually persistent Indian question: who gets to decide what a woman should wear?

The criticism was not simply that Sanon's outfit was unsuitable for an advertisement. It was presented as evidence of insufficient respect for a Hindu festival. Actor and BJP MP Kangana Ranaut - not celebrated for temperance - questioned why anyone would celebrate Rakshabandhan in an outfit she considered too revealing. Others objected to Sanon tying a Rakhi to her pet. Supporters, including Congress leader Rahul Gandhi, defended her right to choose what she wore and accused her critics of moral policing.

There is nothing inherently unreasonable about finding an outfit inappropriate for a particular occasion. Festivals have cultural codes, families have expectations and individuals are entitled to dislike a fashion choice. The problem begins when personal or community preference is converted into a rule about a woman's character, cultural loyalty or right to participate in tradition.

Sanon's response went to the heart of that distinction. Her argument was that respect for culture cannot be measured by a neckline. That is an uncomfortable proposition for a society accustomed to judging women through appearance.

Indian women have repeatedly encountered this policing in different forms. A student wearing shorts has been told to cover her legs. Women in ripped jeans have been publicly criticised. Beauty contestants wearing Western clothes have faced intimidation. Film actors have routinely been judged for what they wear, while their male counterparts rarely face an equivalent demand to demonstrate cultural respect through their clothing.

Traditions survive not because every participant dresses identically, but because people continue to find meaning in them. Rakshabandhan is ultimately about a relationship and the emotions attached to it. Whether an individual believes those emotions should extend to a pet is open to debate. But that debate does not require a verdict on a woman's modesty.

The more troubling development is the ease with which outrage can pressure institutions into retreat. The withdrawal of the advertisement may have been a commercial calculation, but some would argue that the publicity - adverse though it was - only increased brand recognition. But there is a larger principle at stake.

A woman does not surrender her autonomy because she enters a temple, celebrates a festival or appears in an advertisement invoking tradition. Respect for culture should be a matter of conviction, not a dress code imposed by strangers. India can preserve its traditions without policing women's bodies. Indeed, a confident culture should be secure enough to accommodate differences. And a nation beset with several serious problems ought not to get sidetracked by such sartorial distractions.

The Great Compression

India's professional gatekeeping has always been fundamentally temporal. You were qualified because you had waited. The junior in chambers, the resident on the wards, the MSc before the MTech, the master's before the doctorate - these were rites of duration. The new logic is evidentiary: you are qualified because you have demonstrably done the thing, under observation, against a competency map

Nations rarely announce their turning points. They arrive as gazette notifications, addenda to handbooks, and judgments read out on a Friday afternoon. Consider the four that have landed in quick succession.

On 21 August 2026, a Supreme Court bench led by Chief Justice Surya Kant modified its own May 2025 verdict and cut the mandatory pre-entry Bar practice for civil judge (junior division) aspirants from three years to one - with a full year of judicial academy training and a further year of clerkship, six months under a district judge and six under a sitting High Court judge, bolted on after selection. The new regime begins on 1 April 2027. Until 31 March 2027, fresh law graduates may sit the exam with no practice at all, entering service as trainee judicial officers. The decision was 2:1. One judge dissented.

In technical education, the four-year BSc (Honours/Research) born of NEP 2020 has been steadily normalised as equivalent to a four-year engineering degree for postgraduate purposes. AICTE- and government-approved four-year BS/BSc holders now appear by name in the eligibility clauses of ME/MTech admissions at institutions including the IITs, subject to GATE and departmental discretion. A physics graduate can now walk into a semiconductor materials MTech without first detouring through an MSc.

In research, the UGC's post-2022 architecture allows a four-year undergraduate degree holder with 75 per cent marks (or 7.5 CGPA) to sit NET and enter a PhD directly - in any subject, irrespective of the discipline of the bachelor's degree. The MPHil is gone. The master's, for the top decile, is now optional.

In medicine, competency-based medical education has moved simulation from a showpiece to a requirement, with skills labs, early clinical exposure and mannequin-and-VR training embedded in the curriculum. Alongside it, the National Board of Examinations has pushed AI literacy programmes to tens of thousands of postgraduate trainees, the NMC has been folding AI into the foundation course, and in August 2026 a national consultation in Delhi produced a declaration on AI readiness in healthcare and medical education. The NMC's own chairperson has said the plain thing out loud: India's problem is no longer the number of medical seats; it is the quality of the doctor at the end of them. Four different regulators. Four different professions. One hinge.

Every one of these decisions shortens the



runway between a young Indian and the point at which they are permitted to be taken seriously. Read together, these are not four reforms. They are a single wager.

The wager is that time served is a poor proxy for competence held - and that structured, supervised, instrumented training can deliver in one year what unstructured apprenticeship delivered in three, or failed to. This is not a small philosophical shift. India's professional gatekeeping has always been fundamentally temporal. You were qualified because you had waited. The junior in chambers, the resident on the wards, the MSc before the MTech, the master's before the doctorate - these were rites of duration. The new logic is evidentiary: you are qualified because you have demonstrably done the thing, under observation, against a competency map.

The judiciary's own compromise is the cleanest statement of it. The Court did not abolish the experience requirement; it re-engineered it. Two years of ambient courtroom exposure were swapped for one year of academy instruction plus a year of clerkship at two levels of the judicial hierarchy. That is a deliberate exchange of quantity for design.

The same swap is happening in medicine, where a simulated cardiac arrest at 2 a.m. in a skills lab is being treated as pedagogically superior to the possibility of never having seen one during a rotation. And in research, where a four-year UG with a genuine research component is being treated as a better predictor of doctoral capacity than a two-year taught master's. A demographic year, recovered. India's median age is around 29 and rising. Every year shaved off the qualification pipeline is a year added to the productive life of a professional - multiplied across lakhs of entrants annually. Compressed by two or three years each, across law, engineering, research and medicine, this is not a rounding error. It is one of the largest human-capital timing interventions any country has attempted this decade.

The three-year Bar practice rule was argued in court to be pushing women out of the judiciary - the years of unpaid or barely-paid junior practice collide precisely with the years of maximum family pressure to marry and exit. Shortening that window is, in effect, a gender intervention wearing the costume of an eligibility clause. Expect the composition of the subordinate judiciary in 2032 to look measurably different from 2022, and expect that to change what gets litigated and how.

The old system taxed those who could afford to wait. Three unpaid years at the Bar, an extra MSc, an extra master's - each was a wealth filter dressed as a merit filter. Compression is quietly redistributive.

The single most under-read line in all four reforms is the UGC's: a PhD in any subject,

regardless of the undergraduate discipline. That sentence licenses an entire generation of legitimate hybrids - the economics graduate doing a doctorate in climate modelling, the biology graduate in computational linguistics. India's research output has long been strong in volume and thin in genuinely interdisciplinary work. This is the clause that changes that, if the universities let it. A judicial officer appointed at 25 rather than 29 will spend four more years on the bench, and will reach senior positions younger. Multiply that across the civil-adjacent professions and you get a governing class that arrives earlier, stays longer, and was formed by post-2020 institutions rather than pre-liberalisation ones. Whether that produces boldness or brittleness is the central open question of the 2040s. Balance requires naming the failure modes precisely, not gesturing at them. Judgement is not a competency. You can certify a doctor's ability to intubate. You cannot easily certify a judge's ability to disbelieve a plausible witness.

The dissent in the judicial services case rests on a real intuition: courtroom exposure teaches the smell of a case - which affidavit is manufactured, which adjournment is tactical, which litigant is desperate. This is tacit knowledge, and tacit knowledge is

exactly what structured training is worst at transmitting. A trainee judicial officer who has read about mala fide litigation is not the same instrument as one who has been on the receiving end of it. The reform is only as good as the academy. This is the load-bearing risk across all four decisions. The judicial compromise assumes State Judicial Academies of uniform quality - they are not uniform. The medical reform assumes functioning simulation labs

~ a well-funded metro institution and a two-year-old private college in a district town are running the same regulation and not the same education. The MTech pathway assumes four-year BSc programmes with real research content - many will be three-year programmes with a year of padding. Compression without capacity is not acceleration always; it could be dilution with a shorter timeline.

The gap between the best and worst institutions, already India's defining educational fact, will now be measured in readiness at entry rather than years at entry - and it will widen before it narrows. Simulated patients do not have unlisted comorbidities, do not lie about their symptoms, do not arrive with three anxious relatives, and do not die. AI decision support is trained on data distributions that under-represent exactly the Indian district-hospital presentations where it will be deployed. A cohort trained to trust the machine, in settings where the machine is out of distribution, is a specific and foreseeable patient-safety problem. The right response is not to reverse the reform but to build deliberate disconfirmation into it - training that teaches when to override.

Credential compression meets credential inflation. If a PhD is reachable four years out of school, the market response is predictable: the PhD becomes the new master's, and differentiation migrates upward. India could

arrive at 2035 with far more doctorates and no more researchers.

By 2030, the median age of first appointment in the subordinate judiciary will have dropped by roughly three years, and the share of women in entry-level judicial service will have risen sharply. Expect a parallel rise in appellate reversal rates for the 2027-2030 cohorts, and expect that statistic to be weaponised by both sides of the debate before anyone has controlled for case mix.

By 2032, the "MTech from a BSc" cohort will be visibly overrepresented in India's semiconductor, materials, quantum and bio-manufacturing programmes - precisely the sectors where physics and chemistry training beats conventional engineering training. This will be the most quietly successful of the four reforms.

By 2035, India will have a first cohort of researchers who never held a master's degree - and the country will have its first genuine argument about whether the master's degree was ever load-bearing or merely customary. Expect the top institution to quietly reintroduce a screening layer under a different name. By 2040, the clinician trained under CBME-plus-AI will be a structurally different professional: weaker at unaided differential diagnosis, dramatically stronger at pattern recognition at volume, and dependent on infrastructure. India's health system will have to decide whether that is a workforce it can deploy in Tier-3 districts or only in Tier-1 cities.

By 2047, the composite: a professional class that is younger, less deferential, more interdisciplinary, more instrumented, more mobile - and less internally uniform than any India has produced. The old schools do break here. The lineage model of Indian professional life - the chambers, the gushishya lab, the unit under a professor - loses its monopoly on entry. What replaces it is faster and flatter, but also thinner in mentorship, and mentorship is where ethics were historically transmitted.

That is the real trade, stated plainly. India has chosen speed and access over apprenticeship and induction. The gains are immediate, measurable and largely real. The costs are delayed, diffuse, and will show up as judgement failures rather than knowledge failures - a wrong bail order, a missed atypical presentation, a doctoral thesis that is technically flawless and intellectually inert. None of this is fated. The variable is not the reform; it is the scaffolding. Three things decide the outcome. First, whether the training institutions - judicial academies, skills labs, four-year UG research components - are built to a national floor or left to state and market variation. Second, whether India builds structured mentorship back in deliberately, having removed it accidentally: clerkships that are real, residencies that supervise, doctoral committees that read.

Third, whether anyone measures. The 2027 judicial cohort, the first BSc-to-MTech batch, the first direct-entry PhDs - these are natural experiments with clean control groups. A country that tracks them will course-correct by 2032. A country that does not will discover the answer in 2045, when the cohort is running the institutions. The gate has opened. Whether what walks through is fresh talent or merely young talent depends entirely on what India builds on the other side of it.



Connecting strength of Vietnamese communities worldwide

The spirit of 'accompanying and listening,' highlighted in the Politburo's Resolution No. 23-NQ/TW on overseas Vietnamese (OV) affairs is key to strengthening trust, fostering community bonds and mobilising the diverse resources of Vietnamese people abroad for national development, according to Dr Hoàng Thị Hồng Hà, chairwoman of Parfums du Viet Nam and a member of the Executive Committee of the Association of Vietnamese in France.

This approach is particularly important as OV communities are becoming increasingly diverse in terms of generations, professions, living conditions, views and levels of attachment to their homeland, Hà said.

She stressed that national unity does not mean everyone must think alike. Instead, it is important to create common

ground where all those who have goodwill towards Viet Nam feel respected, heard and able to contribute.

Drawing on years of studying, researching and living within the Vietnamese community in France, Hà noted that people have different ways of contributing to the homeland, whether through knowledge, business, social activities, culture and education, or through professional and social networks built in their host countries.

For younger generations born and raised abroad, their connections with Viet Nam may begin with simple things such as the Vietnamese language, family memories, music, cuisine or cultural experiences.

Therefore, it is important that every Vietnamese living overseas, regardless of

generation, feels they have a place within the national community and can contribute according to their abilities.

The expert emphasised that Resolution No.23 not only calls for greater mobilisation of overseas Vietnamese resources but also highlights the responsibility to accompany, support and listen to the community. When OVs feel that the homeland genuinely regards them as an integral part of the nation, trust and a lasting desire to contribute will naturally grow.

She also highlighted the role of Vietnamese associations and organisations abroad as important bridges connecting OV communities with Viet Nam and their host societies. Such organisations can go beyond providing meeting spaces to facilitate cultural exchanges and international cooperation.

Letters To The Editor | ✉ editor@thestatesman.com

Failure

Sir, The sharp rise in sugar prices - nearly 44 per cent within a month - reflects more than a simple supply-demand imbalance. Lower domestic production, trader hoarding, ethanol diversion and rising global prices may have combined to create a supply squeeze ahead of the festive season. This points to policy failure and it needs proactive measures.

The Government's decision to make raw sugar imports duty-free may help mills and refiners, but raw sugar must be processed before reaching consumers which will cause delays. Meanwhile, retaining high import barriers on refined sugar risks

creating a fiasco. The Government cannot escape responsibility. Sugar, ethanol diversion, imports, stockholding and mill releases are all heavily regulated through the sugar policy framework along with each State's internal policies.

The Directorate of Sugar and Vegetable Oils must therefore be held accountable for inadequate anticipation and intervention. In a crisis, the Government should enforce stock-release obligations: 100 per cent, duty-free refined sugar import and action under the Essential Commodities Act where hoarding is established.

It should also review sugar-based ethanol diversion from 20 to 15 per cent and, if necessary, temporarily prioritise food security

over blending targets. Yours, etc., Shahin Yusuf, Guwahati, 26 August.

Trial by TV

Sir, Apropos 'Private Tragedy', published today, the CBI's chargesheet in the Twisha Sharma case marks an important shift from public noise to legal process, and that distinction deserves respect. Domestic cruelty rarely leaves visible marks; it operates through sustained humiliation, isolation and psychological pressure that can drive a person to despair without ever producing a bruise. The law's challenge is to recognise that reality without lowering the evidentiary bar to the point where every troubled

marriage becomes a criminal matter. That balance is difficult but necessary.

What the case also exposes is India's troubling habit of putting the character of a dead woman on trial alongside her alleged tormentors. A woman's personality, lifestyle or personal history cannot explain her death or determine another person's criminal responsibility for it. The next stage of this case must be governed by evidence rather than public outrage, because Twisha Sharma deserves rigorous justice and the accused deserve a fair trial, and neither is possible when courtrooms compete with television studios for the final verdict.

Yours, etc., K. Chidanand Kumar, Bengaluru, 26 August.

But where is India's economic growth?



VIDHU SHEKHAR

Even as the freight lines open and the cranes swing over skylines that did not have them, conversations in some circles, typically elite ones, now carry a refrain that has stopped being a question. Whenever the discussion on the Indian economy comes up, someone says: "But where is the growth?"

A good quarter might be conceded. One or two sectors might be allowed to have done well. But it is quickly followed by the chorus, "Yes, yes. But where is the growth?" The conversation has become a kind of nursery rhyme, and a particularly strange one, because holding on to it now requires an extraordinary act of not looking.

There was an economy whose nominal output rose from about Rs 124 lakh crore to around Rs 346 lakh crore in a decade, with exports reaching roughly \$860 billion. India has been the fastest-growing major economy for much of this period.

"Yes, but is that real growth?"

There was a banking system whose bad loans, once the books were finally opened honestly, rose above eleven per cent. Banks were called zombies.

Gross NPAs are now below two per cent, banks are profitable and credit is expanding. The companies that spent those years repairing themselves are compounding too:

the June quarter delivered 18 per cent Nifty profit growth, the best in ten quarters, with nineteen sectors beating estimates and mid-cap and small-cap earnings growing faster still.

"But that's just the stock market."

There was a railway that had electrified barely a fifth of its network in seven decades and has now electrified 99.6 per cent of its broad-gauge network. Consequential train accidents fell from 135 a year to 16. Metro rail went from 248 kilometres in five cities to over a thousand across twenty-six.

A country with no dedicated freight corridor has now commissioned 2,843 kilometres of one. There were 74 airports; there are now 165. There were 91,287 kilometres of national highways; there are now 1,46,572.

"But can a bullock cart use an expressway?"

There was a power sector with 2.8 gigawatts of solar. India now has more than 164. Non-fossil sources have crossed half of installed electricity capacity, years ahead of the target India had set itself. Rural electricity supply has risen from 12.5 hours a day to more than 22.

A generation is growing up that has never done homework by candlelight.

"But what will people do with electricity?"

Seventeen per cent of rural homes had a tap; the figure is now above eighty. Sanitation went from 39 per cent to near-universal coverage on the back of 12 crore toilets. Medical colleges have gone from 387 to 846, and MBBS seats from 51,348 to nearly

1,40,000. Life expectancy is 72 years, the highest ever recorded here.

And by the World Bank's own count, extreme poverty fell from 27.1 per cent to 5.3 per cent between 2011-12 and 2022-23. That is about 269 million people.

"But those are schemes, not growth."

There was a payments system that barely existed a decade ago and now handles roughly half of all real-time digital transactions on earth.

And 99.2 per cent of the phones sold in India are now made in India, against 26 per cent in 2014-15. Electronics went from a marginal export category to one of the country's largest. Defence exports went from ₹686 crore to more than ₹38,000 crore.

There was barely an Indian semiconductor story worth telling; now twelve manufacturing projects have been approved, and commercial production has begun at three.

"But where is the growth?"

Here is what makes the refrain particularly odd right now. Much of the world has, for now, been reduced to a remarkably narrow economic story: AI, AI chips, AI data centres, AI capital expenditure. The same cluster of companies, the same investment cycle, the same trade, over and over.

India's story looks nothing like that. There is technology growth, but alongside it there is manufacturing, infrastructure, financial services, renewables, defence, electronics, aviation, rail, construction, pharmaceuticals, automobiles, digital commerce and semiconductors.



The point is that there are so many of them. Much of the world is running on one engine. India has several.

Growth looks like a semiconductor plant rising where there was an empty field, and another airport appearing on a map that used to be blank. It looks like a bank lending again because its balance sheet is no longer poisoned.

It also looks like the welder on that freight corridor, and the girl holding the first MBBS seat her village has ever sent anyone to. Like the grandmother who no longer walks two kilometres before dawn for water. Like the small town that got an airport and discovered it was not small.

That is growth. What else would it be?

Nobody is claiming the work is finished. But the direction is no longer in doubt. Give India one more decade like the last one, and today's forecasts will look timid.

One can argue about whether a particular quarter disappointed, whether a project was delayed, whether one sector is overhyped and another underperforming. But if GDP, investment, profits, credit, infrastructure, manufacturing, exports and the emergence of entire new industries do not count as evidence of growth, then "Where is the growth?" is a question constructed so that no answer can satisfy it. That is why the refrain survives every answer, and why it deserves none.

So, the next time it arrives, look at the tracks, the roads, the factories, and the companies that did not exist ten years ago.

Where is the growth? Everywhere you are refusing to look.

(The writer is an economist and Associate Professor of Finance at SPJIMR. He holds a PhD from IIM Calcutta, an MBA from IIM Calcutta, and a B.Tech (Hons) from IIT Kharagpur. Views are personal.)

Change of guard, change of colour

ARGHA KR BANERJEE

As one of the distinctly visible and integral components of public life, it is extremely difficult to ignore the various shades of colour that glare at us in myriad forms via government buildings, flyovers, road-crossings, viaducts, street railings, hospices, public transport vehicles, parks, gardens, and a host of other civic structures, teeming the urban spaces that we inhabit.

As public spaces are accessible to all, the colours chosen for their representation should ideally conform to the needs and requirements of the general public rather than cater to the predilections of the ruling party or the government. In August 2026, the iconic Academy of Fine Arts in Kolkata was at the centre of controversy, as its ticket counter served as a venue for a colourful tug of war between saffron and white, triggering accusations of cultural and political arrogation by rival political parties.

Such a controversy, coupled with the onslaught of blue and white of the erstwhile ruling government, automatically generates some basic pertinent queries: should colours of various public infrastructure on perpetual display be overtly used for political messaging or should the hues be determined on the basis of relevant scientific, environmental, pragmatic and other aesthetic factors?

The question is crucial as the value or choice of colour is not merely an ornamental one. On the contrary, the choice embodies a wide range of

important issues including luminosity, perceptibility, heat absorption, and a host of other allied factors aligned with the urban set-up of a city. Instead of being implemented arbitrarily, colour choices in public spaces should be entrusted with a properly equipped team consisting of specialists in the field like trained urban planners, builders, colour experts, engineers, environmentalists, urban traffic and safety professionals among others.

While it is the democratic prerogative of the ruling government to undertake and implement decisions about public infrastructure, particular choices, including colour, must be backed with qualified knowledge rather than a political impulse based on irrational whims, fancies or brusque political agenda.

At the heart of implementation of the colour policy should lie the basic understanding of the fact, that though ruling parties change, public infrastructure continues to journey from one regime to another. The whimsicality of the political colour syndrome has plagued different parts of the country and the world at different stages of history. In India, besides West Bengal, states like Andhra Pradesh, Uttar Pradesh and Rajasthan had its share of politicised colour obsessions in the recent past. The legendary Communist obsession



with red is well known internationally, pervading countries like China, the former Soviet Union and other states.

In the context of the present day, legitimate protest as regards colour policy should not be directed towards the choice of a particular colour but should be against the alteration of public structures into emblems of prejudiced visual statement. Each colour has its specific place and precise use in our lives. It is also crucial to remember that no individual colour should be stigmatised as representative of a particular political ideology, as

colours carry their uniform charm and appeal across generations.

Scientific studies should ideally form the basis of selection of a particular shade, especially keeping in mind significant factors like visibility, resilience, relevance to a specific purpose, temperature absorption and a host of other allied significant factors deemed fit for the cause.

It is also important to remember that paint carries the baggage of ecological footprint. So, in an era of climate change ecologically superior coatings, wherever relevant and desirable, should be effectively utilised. In choice of colours, distinction must also be made of heritage and culturally significant structures from partisan ownerships.

A particular hue that carried sacred, cultural or historic associations, does not inevitably become inappropriate for use in the public domain. On similar lines of vindication, a political party cannot claim an exclusive right on a particular colour. The central question to be focused on here is the suitability of the particular shade serving the public function of the chosen space. If a colour change implies no verified functional, environmental or architectural validity then wastage of government expenses and other resources is extremely difficult to justify. A colour choice should also be distinctly

independent of individual preferences of the stake holders, bureaucrats and political party members and any other individual aligned with the machinery.

It is imperative to remember that there should be no generally prearranged political shade fixed for any public infrastructure. Only on the basis of a rational, scientific and democratic policy formulated by the government should the colour policy be implemented for any state. The colours should enhance the purpose and function of the relevant enterprise. A speed braker for instance is designed for safety while a government structure should enhance the official and ecological status of the state. The primary safety concern of the speed braker or the designated street railings should not be compromised at any cost by unscientific use of colour.

The colours of heritage buildings should mirror their ethos and sanctity. In short, public colour policy should be evidence-based, milieu-sensitive, politically neutral and unbiased. Political monopolization of colours can trigger greater complications in the long run. When a party colour becomes synonymous with a government property, the substituting government may be involuntarily coerced to repaint it in order to remove the visual identity of its predecessor.

So, it is high time that an autonomous, independent, scientific colour policy is put in place, especially keeping in mind the challenging environmental requirements of the present world.

The writer is the Head, Department of English, St Xavier's College (Autonomous), Kolkata.

100 Years Ago

OCCASIONAL NOTE

Unless the Monarchists of Germany have a touch of insanity it is impossible to accept the view that they have any serious idea of bringing the ex-Kaiser back to Germany. It may be true that the former Emperor is not a prisoner, but that is a matter of the smallest importance. The return of the Kaiser to Germany would at once set in motion the French armies, and Germany has no force that could resist them. This time they would not stop short of Berlin. It is usual to hold that every country has a right to the form of government that it chooses and that the personality of its monarch is not a matter of concern to other nations. That rule cannot apply where the ex-Kaiser is concerned. The world has had experience of him as ruler and knows that there could be no peace with him on the throne. It will be well if Germany understands clearly that the price of the return of the Kaiser will be a determination on the part of the Allies to force him again into exile whatever the cost.

News Items

MINERS' ANXIETY

MANIFESTO SHOWS OF TONE CHANGE

(British Official Wireless.)

A manifesto has been issued by the Miners' Federation which, after reviewing the position of the coal dispute — in which, despite its long duration, the spirit of the miners is resolute and unshaken — states that they are prepared to enter into negotiations on the question of wages. Although indicating no weakening on hours or a national settlement, the manifesto states that "provided the Federation is satisfied that reconstruction of the industry on the lines recommended by the Royal Commission is genuinely taken in hand by both the Government and the owners, it is ready at any moment to discuss wages, either with the Government or with the owners." The Federation secretary, Mr. A. J. Cook, in a speech last night threw no light upon the manner in which the negotiations were to be initiated, but he hinted that the matter would be fully discussed at the Federation Executive meeting to-morrow night, and that the debate in the House of Commons on Tuesday night have an important bearing on the subsequent moves. Parliament is re-assembling to-morrow, primarily to pass the necessary motion for continuing the emergency regulations, which give wide powers to the Government, and must be renewed monthly. Up till now, owing to the good order that has prevailed, it has not been necessary to make use of these powers, except for imposing restrictions on the use of coal and light, particularly for illuminated advertisements. It was not anticipated that the recess would be broken for more than two days by this meeting, but on the motion for the adjournment on Tuesday matters may be raised which would prolong the session. The Commons will meet in the absence of the Prime Minister, who is abroad.

HIS FIFTH BRIDE TWO FAMILIES IN A MARRIAGE TANGLE

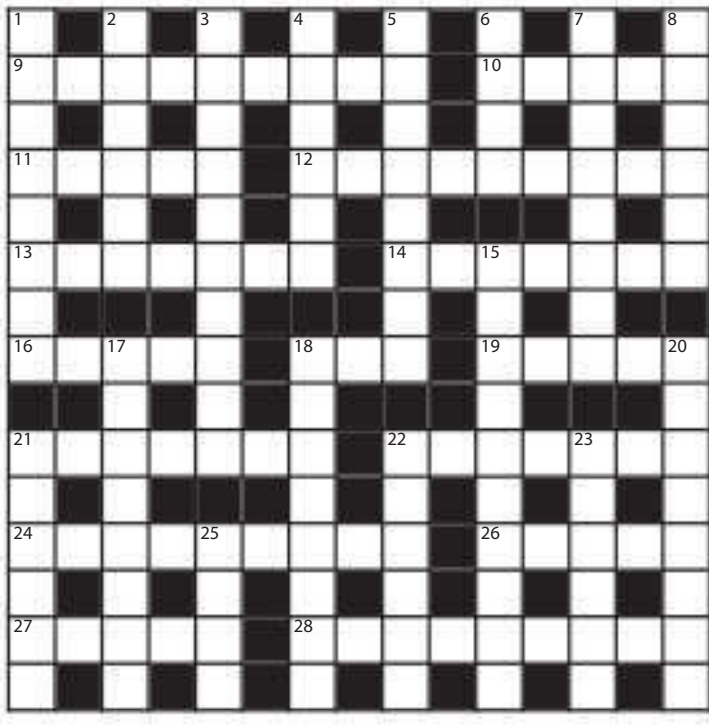
(From Our Special Representative.)

Mr. Richard Harrison (89) a former Blackburn coal dealer, has just returned from his fifth honeymoon. His bride, Mrs. Ann Duxbury, who is nearly 70, is making her third venture in matrimony. The bridegroom's son and the bride's daughter were also married recently, and this has complicated the family relationship. Harrison, who is a non-smoker and teetotalter, walked four miles to the wedding.

FIGHT FOR CRICKET TITLE LANCASHIRE'S LEAD VICTORIES FOR SURREY AND MIDDLESEX

With the completion of the County matches which started yesterday, the cricket season has practically concluded. Only three more games have to be played. Lancashire who commenced their last match yesterday against Wotts at Manchester, are now at the head of the championship table with a small advantage over their rivals, Yorkshire, but the champions, who are at present engaged against Glamorgan, require only a victory over Somerset, whom they meet in their last match, to secure the title once again. Five of the six games were decided. Gloucestershire put up a good fight against Middlesex, and were beaten by only 75 runs. Surrey, Notts, Lancashire and Yorkshire also triumphed. Philip Mead has scored his tenth century for the season and requires only six more to reach his coveted hundred. There is much cricket left in the Hampshire left-hander, and it is likely he will be much in the picture next season.

Crossword | No. 293569



Yesterday's Solution

D	R	A	C	I	L	A		A	S	O	C	I	A	L	
E	R	I	T	K	O	G									
O	B	O	E	P	A	R	T	I	C	I	L	A	R		
E	A	P	A	M	R	I									
S	C	A	M	P	T	I		T	M	P	O	T	E	N	T
C															
H	A	I	R	B	R	U	S	H							
E															
M	O	N	E												
R	D	V													
F	L	A	U	B	E	R	T								
A	C	N	T												
I	N	P	A	T	I	E	N	T	S						
D	E	T	C												
C	O	V	E	R	E	D									

ACROSS

9 Rash having primitive song about twitch (9)

10 Animation shown where monkey loses tail (5)

11 Sleuth Jane, not seeing river, finds wood (5)

12 Buñuel has one to relieve revolutionary reviewer (9)

13 Reduce pressure and scrub round (7)

14 Say yew outside old church is poetic feature (7)

16 Teaching degree presented by setter for example (5)

18 One having scaly body and feathers round neck (3)

19 Put figures together to sound reasonable (3,2)

21 Superior attitude of hot film director (7)

22 See 6 Down

24 Earthy scent from lab dish shortened task (9)

26 Boss must carry doubly large instrument (5)

27 Virtuoso lacking power to bring into use (5)

28 Terrible snore can echo, causing vibration (9)

DOWN

1 Passé mood duet to be reworked (8)

2 Upset manipulated figures losing a penny increase (4,2)

3 Brewed treacle that goes into superb snowball (10)

4 Cooler frost initially seen on hilltop (6)

5 Bond actress up when devilish snatches husband (8)

6/22A No longer fit public torment includes greeting (4,3,4)

7 Sorry Watts had dry heavens (8)

8 Save energy with curse undone (6)

15 Broken pane with closet reflecting different colours (10)

17 Bony obstruction presents challenge (8)

18 Check daily temperature graph (3,5)

20 Use lay-by in Jersey? (8)

21 Wi-Fi connection? (6)

22 Spotted flyer in extremely tough attack (6)

23 Upright character smooth enrolling student for Easter? (6)

25 Beer losing head: nothing to get enthusiastic about (4)

NOTE: Figures in parentheses denote the number of letters in the words required. (By arrangement with The Independent, London)

The Tribune

ESTABLISHED IN 1881

Economic boost

Robust GDP growth must not fuel complacency

THE Indian economy began the 2026-27 financial year on a strong footing, with real GDP (adjusted for inflation) expanding by 7.8% in the April-June quarter. The performance exceeded the Reserve Bank of India's estimate of 7% growth and comfortably surpassed most market expectations. It also kept India among the fastest-growing major economies, despite the disruption caused by the West Asia conflict, volatile energy markets and wider global uncertainty. The headline number is supported by reasonably broad-based activity. Manufacturing grew by 9.2%, while the services sector expanded at a robust pace. Private consumption also remained healthy, while higher capital goods production and government capital expenditure point to continued infrastructure and investment demand. However, the agriculture sector remains vulnerable to weather shocks.

The data strengthens the case for an upward revision of the full-year growth outlook. The RBI's current projection of 6.7% may prove conservative if domestic demand and investment remain resilient. Yet a good quarter should not be mistaken for immunity from risk. The 7.8% growth rate represents a moderation from the previous quarter's 8.6% expansion. External uncertainties continue to be formidable. Trade tensions, geopolitical conflicts and possible disruptions to energy supplies could raise input costs and weaken export prospects. Higher crude oil prices would be particularly consequential for an oil-importing nation such as India.

Domestic factors also warrant attention. Questions about inflation and unemployment cannot be dismissed simply because GDP growth has exceeded expectations. Political reactions have predictably diverged — the government has highlighted resilience and reforms, while the Opposition has questioned the methodology behind the GDP estimates. Such scrutiny is healthy, provided the debate remains anchored in evidence. The latest figures deserve recognition, but not complacency. The real test will be whether India can convert this quarterly momentum into sustained, broad-based growth that creates jobs, supports incomes and withstands the global shocks that lie ahead.

Erratic monsoon

India should prepare for uncertainty

INDIA's monsoon is sending a warning that should not be ignored. August was the country's hottest August since records began in 1901, even as rainfall remained 16% below normal. More worrying, the India Meteorological Department expects September rainfall to be below normal and temperatures to remain above normal over most of the country. The combination is more consequential than either statistic alone. A warmer country facing a weaker monsoon is exposed to greater heat stress, crop losses, water shortages and pressure on groundwater. The deeper concern is that rainfall is becoming increasingly erratic and uneven. A national average can conceal sharply different local realities: some regions may receive intense bursts while others remain parched. El Niño has contributed to the subdued monsoon, but natural variability is now playing out against a warming climate. India must therefore prepare not merely for less rain, but for more uncertain rain.

The north-west provides an especially telling warning. Punjab has recorded the region's highest monsoon deficit, at 36%, while Haryana has also remained short of rainfall. Himachal Pradesh recorded a 16% deficit in August and a 10% seasonal shortfall. Chandigarh, meanwhile, had 13% less rain than normal. At the same time, Himachal continues to face episodes of intense rain, landslides and road blockages. The paradox is revealing: a rainfall deficit does not necessarily mean fewer weather disasters. Short, intense spells can coexist with a deficient season.

For Punjab and Haryana, the implications extend directly to agriculture and groundwater. A weak monsoon can increase dependence on irrigation precisely when aquifer recharge is inadequate. For Himachal, the priority is different but connected: catchment protection, slope stabilisation and disaster preparedness must accompany water planning.

ON THIS DAY...100 YEARS AGO

The Tribune.

LAHORE, THURSDAY, SEPTEMBER 2, 1926

The unemployment problem

THE Government of India recently issued a circular to local governments on the subject of unemployment. This question was debated in the Legislative Assembly, and the government was asked to take steps to address unemployment, which was becoming a complex and difficult problem in almost all provinces of India. The Government of India, for reasons not very clear to the public, declined to appoint a Committee of Enquiry but has called the attention of local governments to take such steps as are suitable to local conditions. The government, however, admits that the problem is of increasing urgency and importance and has to be tackled. It thinks that it's the function of the local governments and the people themselves. This attitude of the Central government is, indeed, surprising. If the government had appointed a Committee of Enquiry and ascertained the real causes of unemployment, it would have furnished facts to show in what direction remedies could be found. But the government has preferred to put responsibility on others. We are told, however, that the underlying factors that should be considered in solving the problem are, "the educational system of the country, the industrial development, the changes that are being slowly wrought in the social structure — and the psychological factors inherent in the habits and customs of the people." But is not the Government of India responsible for the educational system, the industrial conditions and, to some extent, even the social habits, customs, etc. of the people?

OPINION

Pay heed to Himalayan warnings

One disaster after another has laid bare the gap between scientific evidence and policymaking



DINESH C SHARMA
SCIENCE COMMENTATOR

THE Himalayas have been giving one warning after another in the form of deadly disasters — flashfloods, avalanches, glacial lake outburst flood (GLOF), cloudbursts, landslides, severe land subsidence. We have seen them happen in Kedarnath, Dhauliganga, Joshimath, Sikkim and now in Nepal, leaving a trail of destruction.

After every disaster, there is talk of monitoring glaciers, developing early warning systems, hazard risk mapping and taking preventive and mitigation measures. After a few weeks or months, the din dies down, and it is back to business as usual.

Dealing with disasters in the Himalayas requires a multi-pronged strategy, involving scientific research, policymaking, implementation machinery, public awareness and community involvement.

Science has been unequivocal about the threat to Himalayan ecology, particularly the situation relating to glaciers and water systems — what needs to be done and the gaps in understanding. At the global level, the Intergovernmental Panel on Climate Change (IPCC) has published several reports, synthesising research findings on glaciers and hilly ecosystems from various countries.

In India, the National Remote Sensing Centre has used remote sensing imagery to map over 7,500 glacial lakes (out of 28,000) in the Indian Himalayan Region. It has even prepared flood risk maps for high-risk glacial lakes, detailing flood hazard and flood wave arrival time for settlements downstream if they



NEPAL TRAGEDY : Dealing with calamities in the Himalayas requires a multi-pronged strategy. REUTERS

were to breach at some point.

In March this year, the Kathmandu-based International Centre for Integrated Mountain Development (ICIMOD) published two remarkable reports — 'Changing Dynamics of Glaciers in the Hindu Kush Himalaya Region from 1990 to 2020' and 'HKH Glacier Outlook 2026: Insights from 50 Years of Himalayan Glacier Monitoring.'

The findings of these reports were alarming. The first one was based on data from 63,761 glaciers across the Hindu Kush region, covering over 55,000 square km and containing an estimated 5,700 cubic km of ice reserves. The analysis showed that glaciers across the region have been consistently retreating since 1990, resulting in a 12% reduction in total glacier area and a 9% decline in estimated ice reserves.

The most pronounced acceleration in glacier shrinkage occurred between 2010 and 2020, particularly in the eastern and central parts. The Indus river basin lost 6% of its glacier area, while the Ganga and Brahmaputra river basins experienced a reduction of 21% and 16%, respectively. The direct result of such glacier retreat would be diminishing water availability during dry seasons and risks such as GLOF, ava-

Monitoring of glaciers and glacial lakes can't go hand in hand with unrestricted development and commercial tourism in fragile regions.

lanches, landslides and debris flows, the report warned.

The second report based on 38 monitored glaciers signalled that "parts of the Himalayan cryosphere may be nearing critical tipping points toward irreversible retreat." The message from Pema Gyamtsho, Director General of ICIMOD, to policymakers was direct : "This is not a distant problem, but a crisis unfolding in real time, with new disasters every summer and monsoon. The fact that ice loss rates have doubled this century should shock us all into action."

These words almost sound prophetic after the latest disaster in Nepal. According to Gyamtsho, "These aren't blind spots becoming surprises anymore; they are

THOUGHT FOR THE DAY

There is a need for a new and long-term policy to protect the dying Himalayas. — Sunderlal Bahuguna

The many lives of sunglasses

PRIYANKA SINGH

WHEN I recently went to an optician to get my glasses made, I was prepared for the familiar question about my refractive error, or rather, my diopter number. What I wasn't ready for was the options on offer: polarised, blue-cut, progressive, photochromic, anti-glare and whatnot. I had arrived with a rather modest wish list — sturdy glasses, protection from screen glare and a simple tint, rather than one that changed with the light. Clearly, I needed to do my homework before stepping into the optical ring.

Sunglasses are no longer simply dark glasses. There is an entire vocabulary attached to them now and each has its purpose: reducing glare, protecting against ultraviolet rays, adapting to changing light, shielding the eyes from wind and reflected snow, or combining vision correction with sun protection. And then there are glasses of the fashionable kind. Oversized shades can offer celebrities a measure of privacy, while dark glasses worn by security personnel can project authority and conceal the eyes. In popular imagination, tinted glasses can suggest the inscrutability of a judge whose eyes reveal nothing.

The urge to shield the eyes from the sun, however, is hardly modern. There are accounts from antiquity of coloured stones being used for this purpose. The most famous is the story of the Roman Emperor Nero watching gladiatorial contests through a green emerald. Whether the emerald actually served as early sunglasses or the story got embellished over time, the image is irresistible: the emperor, the arena, the blazing sun and the green stone held before the eyes. From Nero's emerald to today's UV ratings, sunglasses have travelled a long way.

And yet, in my family, they have a history of their own. Whenever my siblings and their families gather, we ask our parents, born just after Independence, what they remember their own parents telling them about the British era. Interestingly, both my maternal and paternal grandmothers had similar memories of village women hiding in the fields when British officials, wearing sunglasses, came on horseback. My mother recalls her mother mentioning "andhe sheeshe waale chashme" — dark-tinted glasses that, to her, were meant for the blind!

We could not stop laughing at the curious expression. And it became even more apt because my father had just undergone cataract surgery and was wearing a dark, protective pair of glasses. For a moment, all our sophisticated terminology collapsed into my grandmother's earthy words.

Perhaps that is the curious journey of objects: the same dark lenses can represent technology, protection, fashion, authority or memory, depending on who is looking. Today, I may know the difference between polarised and photochromic, but in our family vocabulary, "andhe sheeshe waale chashme" will always remain the most memorable name for them.

The writer is an educator and researcher from Kurukshetra

LETTERS TO THE EDITOR

Legal fraternity at a crossroads

With reference to 'Poor prisoners need more than lawyers'; counselling under the Legal Aid Defence Counsel System is certainly essential for prisoners who genuinely cannot afford lawyers' fees. At the same time, concerns raised by sections of the Bar about state-funded legal aid systems creating a parallel criminal-defence structure deserve serious consideration. Such arrangements should not unintentionally undermine the professional opportunities, independence or accountability of practising advocates. Courts are already facing an enormous backlog, and if society also learns to resolve suitable disputes through dialogue, mediation and amicable settlement, judicial time can be used for important matters.

HARISH MONGA, FEROZEPUR

Give educationists a free hand

Refer to 'Way forward for Punjab school education'; unless education is insulated from non-academic influences, equitable and democratic aspirations of ordinary citizens will remain a far cry even under NEP 2020. Let education be left in the hands of educationists, and not just make cosmetic changes. When core objectives are divorced from the system's actual functioning, collapse of the educational edifice occurs within no time. Schools are operating under political influence, vote bank politics, and other superfluous reasons.

SAVITA MEHTA, PATHANKOT

Rankings not the purpose

Apropos of 'University rankings'; when numbers become the primary measure of success, universities and institutes of higher learning start focusing on them rather than the quality of education. Patents, publications and research projects certainly have value, but they cannot alone define the quality of education in an institution. Instead of doing meaningful work and then reporting it, institutions often work primarily to produce something valuable to report. The more fundamental question is: What is the institution giving to a student who spends some of the most formative years of his life there? Rankings can be useful indicators, but they must not become the purpose of education.

NAVDEEP KAUR, AMRITSAR

AI a double-edged sword

Refer to 'AI anxiety'; the growing concern among young workers regarding AI replacing manual work has intensified with the rapid evolution of platforms like ChatGPT, Claude and Gemini, which regularly launch specifically designed models to trim down workloads and improve efficiency. Ultimately, it's a double-edged sword. While easing the drudgery of technical labour, AI has put those lacking technological knowhow on the back foot. It is up to the younger generation to keep pace with AI's latest advancements to get the best of both worlds, ensuring smarter work and more career avenues.

SURAJ KATHURIA, JIND

Unfair to candidates without quota

The caste divide narrative that was promoted by the British through the Government of India (Scheduled Castes) Order, 1936, has deepened. The Constitution accepted the caste schedule of the British that provided reservation, whose scope has expanded enormously since then, leaving no scope for the economically underprivileged. The Scheduled Castes and the Scheduled Tribes (Prevention of Atrocities) Act, 1989, and the UGC (Promotion of Equity in Higher Education Institutions) Regulations, 2026, pushed by the Supreme Court have widened the gap. The State has in a way become legally cruel towards the General Category candidates. When will this hypocrisy end?

JAI PRAKASH GUPTA, AMBALA

Beyond the 'trick' narrative

India's GDP grew by 7.8 per cent in the first quarter of the current financial year. To characterise GDP reporting as a "trick" is to misunderstand its fundamental purpose: it is an internationally standardised accounting tool designed to measure a nation's total economic muscle, not its social equity. Governments do not invent these metrics to deceive; rather, they emphasise them because aggregate growth is the primary indicator of global competition, fiscal capacity and a country's ability to attract foreign investment.

CAPT AMAR JEET (RETD), KHARAR

Punjab’s water rights cannot be wished away



SS BOPARAI
CHAIRMAN, JAGO
PUNJAB MANCH

THE Jago Punjab Manch would like to intervene in the ongoing debate over the sharing of the Sutlej river waters. The article Rethink Sutlej water sharing' (*The Tribune*, August 17) is devoid of background and history, the force of tradition, the binding limits of the Constitution and, most importantly, lacks clarity on what the rules should be.

In this respect, there is a significant precedent. When the State of Madras was bifurcated, it lost all rights to the waters of the Krishna and Pennar rivers, which, after bifurcation, belonged to Andhra Pradesh alone.

The constitutional concept of the supremacy of riparian rights was also upheld in the Narmada water dispute, where a tribunal set up by the Central government in 1969 to resolve the dispute over sharing of the Narmada waters among the riparian states of Madhya Pradesh, Maharashtra and Gujarat. The tribunal rejected Rajasthan's petition, holding that, as a non-riparian state, it was not entitled to any portion of the waters of the Narmada.

The concepts of riparian rights and royalty or seignior-

age came to India with the British rulers, to whom we owe the modern systems of governance and administration. In those times, there was no dispute regarding the sharing of waters. Rajasthan gave Punjab royalty for water taken from the land of five rivers.

Maharaja Ganga Singh of Bikaner state had earned the gratitude of the British by giving them a battalion of camel-riding infantry for their use in the war. So had Punjab, but the British charged a lesser rate of royalty to the Maharaja while not breaking the rule.

In the matter of river waters, what Punjab alone has given to non-riparian states is much more than what the rest of India has given. Our river waters are 33 MAF in total. The river waters of India are 330 MAF. Of the total water distributed, Punjab has given 80% and the rest of India 20%.

The British knew how to rule — not a single dispute in India regarding waters arose in their time. The Indian government, however, has ruled differently in different cases. "You show me the face; I will show you the rule" was the idiom that came up soon after Independence.

Pandit Nehru sent a 'Secret Note' dated January 29, 1955. Its veracity was questioned by our minister, Chaudhry Lehri Singh, and then Finance Minister, as quoted in Chaudhry's letter, but has remained uncontested by the Central government till today. This was followed up with another letter.

For seven months, he did not sign that note, and then he was threatened. The note was nev-



UNEQUAL : What Punjab alone has given to non-riparian states is much more than what the rest of India has given.

er put up before the Cabinet or in the Vidhan Sabha. Clause 5 of the note on royalty is still a part of that *faman* and has not been implemented.

These three events are independent of each other. Independence decided the areas of Pakistan and India, and nothing else. Independence decided that East Punjab would remain with India. Hence, these rivers flowing in East Punjab came to India.

That impacted the creation of the Indus Waters Treaty (IWT), and as these rivers flowed through Punjab areas, water from these rivers could be claimed. The Constitution came into force in 1950 and is the main and the only basis for the utilisation of natural resources of India. The Constitution is clear on the subject and there is no dispute about it.

Moreover, Bikaner got water from Punjab because there was an agreement, and in lieu there-

Punjab waters have been distributed without a detailed examination of the complexities of the subject.

of, it paid royalty to Punjab well into the post-Independence era. So, Independence had no impact on the distribution of Punjab's natural resources.

The Constitution decided how India would be governed; how areas would be organised in the territory of India; and how its resources would be used for the benefit of the whole country. The question of ownership of the water resources of a state is clear.

The Indus Waters Treaty (IWT) is a resolution of the question of the distribution of waters between India and Pakistan. This claim was made on the basis of the need for arid and desert areas in India. Independence was nearly 10 years old and, therefore, had no consequence on the principle of distribution of water.

Therein comes the Secret Note of January, 1955. Secret from whom? From the people of Punjab as the state was still healing from the

wounds of the Partition.

But the real point is that it provided for the cost of water to be determined. Is that an imaginary situation today? Certainly not. Very recently, during the Modi government rule, it was decided that Delhi will pay Rs 21 crore per year to Himachal Pradesh for its share of the Yamuna waters to be given to Delhi.

We should not reduce Punjab's case through fallacious arguments. Rajasthan too has been permitted to sell river waters of Punjab flowing into Rajasthan for a large amount to the Barmer Refinery by the Modi government.

The Constitution gives the Central government the authority to set up a tribunal to decide water issues between riparian states, and no more. Punjab waters have been distributed without a detailed examination of the complexities of the subject.

The action of the Centre in sidelining Punjab's rights has cost the state a great deal. Water had to be lifted at seven different places, against the principle of natural flow. In the erstwhile Punjab, the state government had proposed a project to irrigate some higher-level arid areas in the erstwhile (now) Haryana areas; the project was rejected by the Centre. So much for the impartiality of the Centre in deciding Punjab's water issues.

Prime Minister Indira Gandhi elevated the 1955 Secret Note unilaterally in 1981 to the status of a "Deemed Agreement", although this note never went through the rigours of an agreement. Bikaner paid

royalty well into the period of independent India. Who stopped that? Who gave that order? Our then PM made Rajasthan a party to Punjab's Reorganisation Act, allowing it even more Punjab waters and the setting up of the Bhakra Beas Management Board with unconstitutional entries.

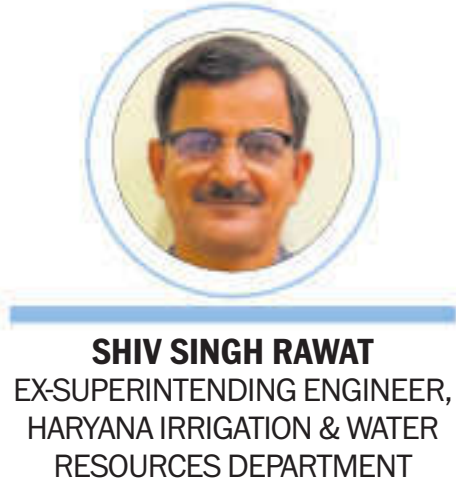
There is no other such example in India. And the then Prime Minister, parachuting Section 14 relating to the constitution of a tribunal for the Ravi-Beas waters into the 'All India River Waters Disputes Act', too, is a monstrosity, bringing out India's vagrancy in basic principles of governance. What can a Punjab in pain say to the Prime Ministers except quote a Punjabi saying: "*Andha wandde seerni, murr murr apneyaan nu.*" (The blind distribute sweets to their own).

The people of Punjab must celebrate the memory of Prime Minister Morarji Desai for his constitutional stand. The chief ministers of Rajasthan and Haryana were complaining to him that Punjab was not cooperative, even though Punjab had shared more than 60% of its lifeblood with those states. Desai began by asking the Haryana CM: "Show me on the map where these rivers flow." The Sutlej is 100 km from Haryana, the Beas 200 km and the Ravi 300 km. The PM replied: "Your states do not even touch these rivers. So, you have no right over these rivers," and dismissed the meeting.

"*Lamhon ne khata ki thi, sadiyon ne saza paayi.*"

For full article, go to www.tribuneindia.com/opinion

Gurugram’s rain problem is really a planning problem



SHIV SINGH RAWAT
EX-SUPERINTENDING ENGINEER,
HARYANA IRRIGATION & WATER
RESOURCES DEPARTMENT

GURUGRAM began as a modest village, evolved into a planned urban centre and emerged as India's celebrated 'Millennium City' and corporate powerhouse. Yet every monsoon brings less flattering nicknames — "Gurujam" and "Jalgram". Some of India's most expensive homes and offices coexist with roads that turn into rivers within a few hours of rain. The question is whether the city generating enormous economic value can provide basic infrastructure and safety to its citizens.

The rainfall on August 24 exposed this contradiction yet again. Gurugram received about 75 mm of rain, including 52 mm in three hours. Major roads and residential areas were waterlogged, traffic disrupted and school buses stranded for hours. District administration advised offices to work from home and schools to shift online.

When children are trapped

in buses and commuters are not safe, waterlogging becomes a public safety and governance issue.

It would be simplistic to declare the entire drainage network dysfunctional. Some drains have been upgraded and new infrastructure added. Sanath Road in Sector 18, Gurugram, offers a contrasting example, with bioswales, rain gardens, appropriate gradients and infiltration to manage rainwater close to where it falls. Therefore, the challenge is applying it across a rapidly urbanising landscape.

Gurugram's built-up area reportedly grew nearly 64% in a decade, from 102.5 sq km in 2015 to 168.2 sq km in 2025. Roads, buildings, basements, parking areas and commercial complexes have replaced permeable land, converting rainfall into rapid surface runoff. The loss of natural water infrastructure is equally revealing. Gurugram had 640 water bodies in 1956; by 2018-19, only 251 remained. These were natural stormwater-storage and groundwater-recharge assets.

Historically, rainwater flowed from the Aravalli side towards the Najafgarh basin through natural depressions, ponds, *bunds* and drainage channels. Ghata Lake and the Badshapur drainage corridor played important roles in flood mitigation, storing and conveying water. Urbanisation narrowed, concretised or obstructed these



PUBLIC SAFETY : When schoolchildren are trapped in buses, waterlogging becomes a governance issue.

routes, while water bodies and traditional storage areas and *bunds* disappeared. The system has been replaced by concrete drains and emergency pumping. According to media reports, Gurugram's original drainage system was designed for 2.5 mm of rainfall per hour and has been upgraded to around 6.5-7 mm per hour.

However, drainage design cannot be judged by one rainfall figure. It depends on rainfall intensity, duration, frequency, return period, catchment characteristics, imperviousness, runoff, storage and downstream capacity.

The Gurugram Metropolitan Development Authority (GMDA) should disclose, catchment-wise, the design rainfall, return period, runoff assumptions and hydraulic capacity of major drains. The

Every flood should also be viewed as a missed recharge opportunity.

critical question is whether present standards reflect rapid urbanisation, reduced infiltration and increasingly intense short-duration rainfall.

Cleaning and widening drains, constructing new ones and deploying pumps have their place, but cannot solve the hydrological imbalance. Gurugram must shift from "collect and convey" to "retain, recharge and release".

Gurugram must manage rainwater where it falls. Parks, schools, corporate campuses, rooftops and housing societies can become stormwater-management units through rain gardens, bioswales, permeable surfaces, detention ponds, recharge basins and wells.

The principle is simple: where feasible, rainwater should become groundwater, not road-water. Every flood should also

be viewed as a missed recharge opportunity. Restoring ponds, wetlands and flood-storage areas can reduce peak runoff while replenishing aquifers. The Najafgarh Jheel system deserves consideration as a wetland and flood-storage asset.

Gurugram needs blue-green infrastructure linking ponds, wetlands, parks, rain gardens and bioswales. Where natural drainage routes are lost, Tokyo's underground flood tunnels and Singapore's integrated stormwater management systems offer useful lessons. Such engineering should complement natural storage, infiltration, wetlands and groundwater recharge to build climate-resilient infrastructure.

New development cannot continue on the principle of "real estate first, infrastructure later." Before approving major projects, authorities must establish where rainwater will go, which natural drainage corridors are protected, where excess water will be stored, how much groundwater recharge will occur and what additional burden the project will impose downstream. GIS-linked building approvals, catchment-level hydraulic modelling and a digital twin of the drainage network can improve planning. Real-time rainfall and water-level sensors can provide early warnings.

Garbage is also a drainage issue. Plastic, construction debris and silt reduce

hydraulic efficiency and block inlets. Desilting must be accompanied by strict waste-management enforcement. Citizens, developers and institutions must share responsibility. Multiple agencies share responsibility for Gurugram's drainage, roads, sewerage, land development, water supply and solid waste. Institutional fragmentation cannot become fragmented accountability.

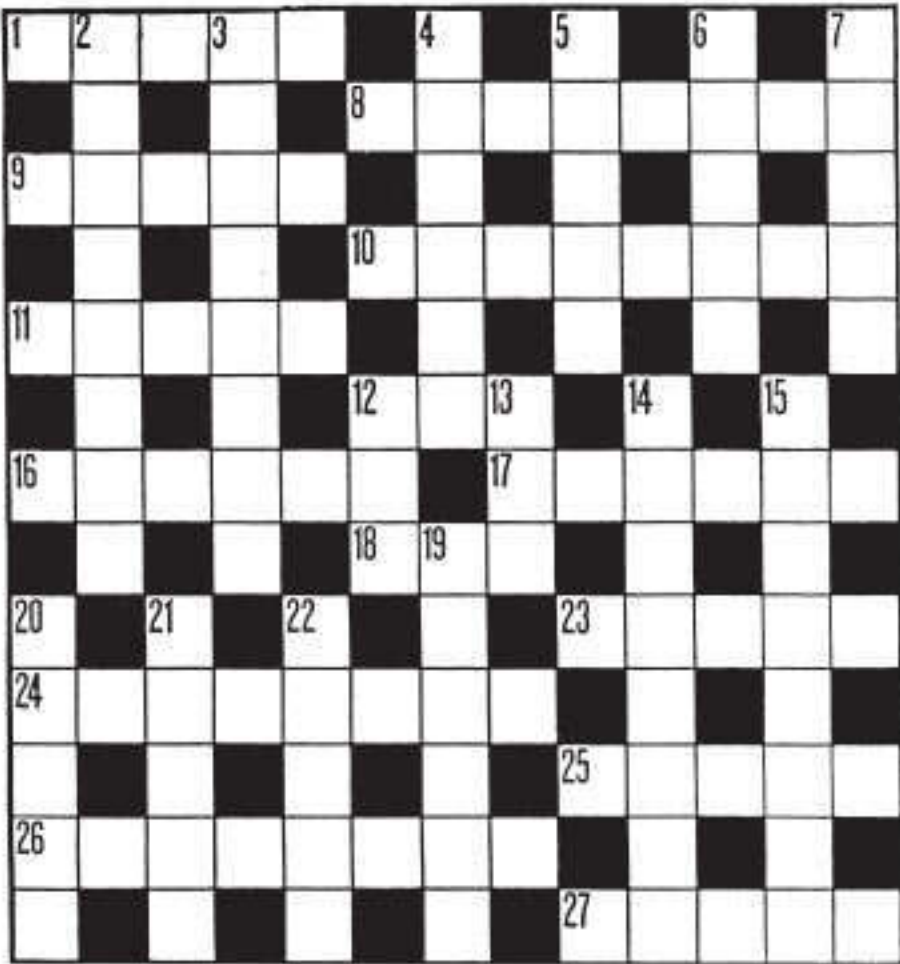
Every major waterlogging event should trigger a public post-rainfall hydraulic audit recording rainfall, runoff, drainage capacity, bottlenecks, flooding duration, causes, responsible agencies and time-bound corrective measures.

Gurugram needs a new development philosophy. The pathway is clear: protect natural drainage, restore ponds and wetlands, capture rain where it falls, recharge groundwater, reduce runoff, remove bottlenecks, upgrade drainage scientifically, expand blue-green infrastructure, monitor the network digitally and establish clear accountability.

The real measure of a Millennium City is not the height of its skyscrapers or the price of its apartments. It is whether a child can safely return home after a monsoon shower.

With science-based planning, accountable governance and civic participation, Gurugram can become a city it should have been all along — a genuinely flood-resilient city.

QUICK CROSSWORD



ACROSS

- 1 Hard to cope with (5)
- 8 Loss of status (8)
- 9 Important (5)
- 10 Work with great energy (2,2,4)
- 11 Irreligious (5)
- 12 To grant to a tenant (3)
- 16 Recess (6)
- 17 Waterproof hooded jacket (6)
- 18 Break in continuity (3)
- 23 Consider attentively (5)
- 24 Hackneyed (4-4)
- 25 A parody (5)
- 26 Middle West US state (8)
- 27 Direct the course of (5)

Yesterday's Solution

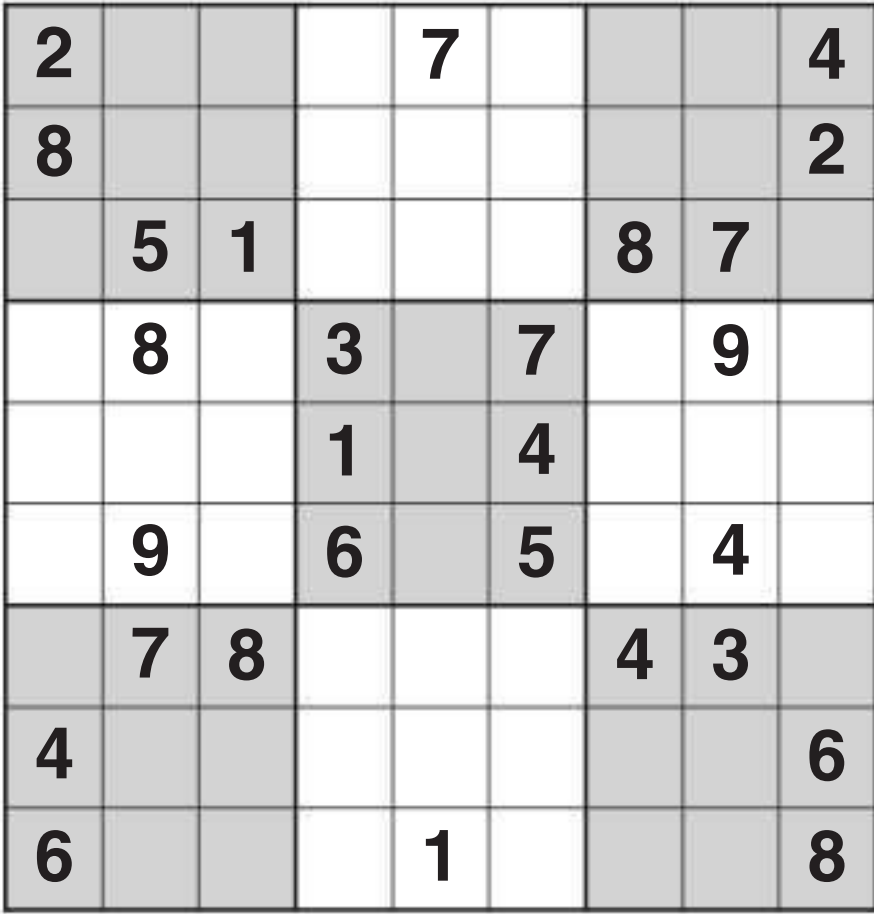
Across: 1 Second-best, 6 Coup, 10 Guest, 11 Resurrect, 12 Graduate, 13 Grain, 15 Average, 17 Dungeon, 19 Instead, 21 Solicit, 22 Aorta, 24 Captious, 27 Inevitable, 28 Later, 29 Null, 30 Underworld.

Down: 1 Sage, 2 Cheerless, 3 Noted, 4 Barrage, 5 Suspend, 7 Omega, 8 Put an end to, 9 Original, 14 Navigation, 16 Abeyance, 18 Encounter, 20 Diction, 21 Supreme, 23 Rival, 25 In-law, 26 Prod.

DOWN

- 2 Excessively (2,1,5)
- 3 Over the whole range (4,1,2,1)
- 4 Ill-tempered and sullen (6)
- 5 A citrus fruit (5)
- 6 A punctuation mark (5)
- 7 Senseless (5)
- 12 One stage in a trip (3)
- 13 Light audible blow (3)
- 14 Sentimental weakness (4,4)
- 15 Die-hard members of group (4,4)
- 19 Fearful (6)
- 20 Be in store for (5)
- 21 In a furtive way (5)
- 22 Show off (5)

SU DO KU



MEDIUM
epaper.tribuneindia.com

YESTERDAY'S SOLUTION

6	7	5	1	8	9	2	4	3
8	4	1	7	3	2	9	6	5
2	9	3	4	6	5	1	8	7
9	1	4	5	7	8	3	2	6
3	6	8	2	4	1	7	5	9
7	5	2	3	9	6	8	1	4
5	8	7	6	1	3	4	9	2
4	2	9	8	5	7	6	3	1
1	3	6	9	2	4	5	7	8

CALENDAR

SEPTEMBER 2, 2026, WEDNESDAY

■ Shaka Samvat	1948
■ Bhadrabad Shaka	11
■ Bhadrabad Parvashite	16
■ Hijari	1448
■ Krishna Paksha Tithi 5, up to 6:13 am	
■ Krishna Paksha Tithi 6, up to 4:27 am	
■ Dhruva Yoga up to 9:12 pm	
■ Bharni Nakshatra up to 1:43 am	
■ Moon in Aries sign	

FORECAST

SUNSET:	WEDNESDAY	19:05 HRS
SUNRISE:	THURSDAY	05:33 HRS
CITY	MAX	MIN
Chandigarh	33	24
New Delhi	33	24
Amritsar	33	26
Bathinda	36	25
Jalandhar	33	26
Ludhiana	33	26
Bhiwani	37	25
Hisar	38	26
Sirsa	37	26
Dharamsala	29	18
Manali	24	18
Shimla	23	15
Srinagar	30	18
Jammu	32	25
Kargil	28	14
Leh	25	12
Dehradun	28	21
Mussoorie	19	15

TEMPERATURE IN °C

INTERNATIONAL EDITORIALS



A challenge for Japan: Who builds Asia's nuclear reactors

SMRs become the latest tool in Tokyo's security strategy

VARUNA SHANKAR
CONTRIBUTING WRITER

Japan's greatest strategic vulnerability may not be missiles or warships. It may be who builds Asia's power plants.

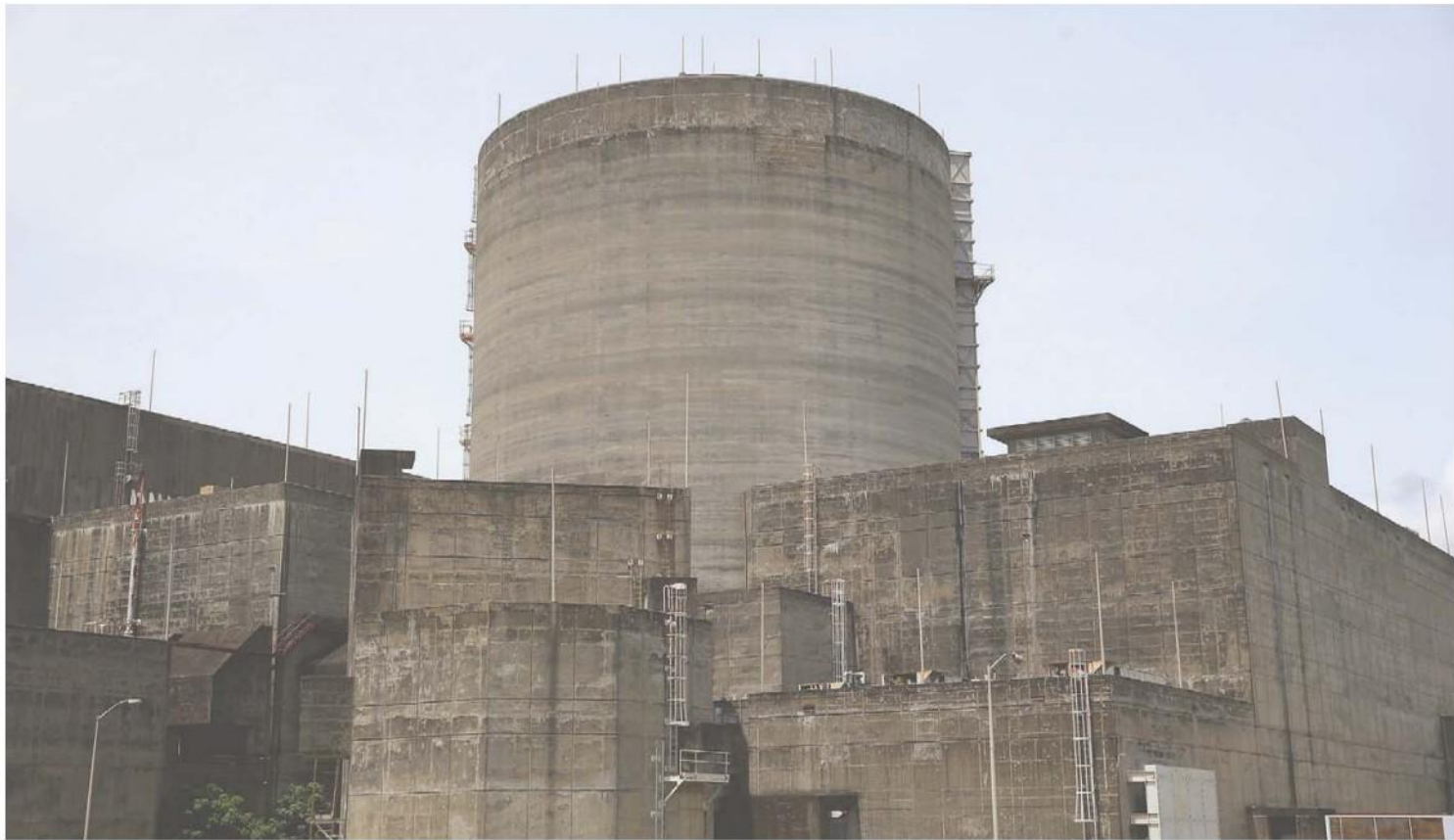
As China expands its military reach across the Indo-Pacific, it is also quietly extending its influence through civil nuclear exports. Every reactor Beijing or Moscow builds creates a relationship that can last for generations, binding countries through fuel supplies, financing, maintenance, technical standards and political ties. In an era of intensifying great-power competition, exporting a nuclear power plant is less like selling infrastructure than securing long-term geopolitical influence.

That reality helps explain why the United States, Japan and South Korea recently signed a Memorandum of Cooperation to jointly export small modular reactors, or SMRs, across the Indo-Pacific. On its face, it is an energy agreement. In practice, it is a strategic response to China's growing regional influence and an acknowledgment that Japan's security depends not only on military alliances but also on who shapes the region's critical infrastructure.

Statecraft

For years, China and Russia have understood something Western governments often overlooked: Civil nuclear power is an instrument of statecraft. Unlike a highway or a port, a nuclear power plant creates a relationship that lasts for decades. The country that supplies the reactor often provides the fuel, trains engineers, services equipment, helps manage spent fuel and finances future upgrades. Choosing a reactor is therefore also choosing a long-term technological, financial and diplomatic partner.

Beijing has used its vast domestic manufacturing base and indigenous reactor designs to expand overseas. Russia's Rosatom has built one of the world's most successful reactor export businesses, offering construction, financing and long-term operational support as a single package. Together, China and Russia have assembled



The Philippines mothballed the Bataan Nuclear Power Plant built by the U.S. company Westinghouse after its completion in 1984, never commissioning the facility.
REUTERS

a formidable pipeline of overseas projects, creating a nuclear ecosystem that deepens their influence across the developing world.

For Japan, the implications extend far beyond commercial competition. The Indo-Pacific is expected to account for much of the world's future growth in electricity demand. Artificial intelligence, data centers and advanced manufacturing are driving unprecedented increases in power consumption, while many developing countries are simultaneously trying to reduce carbon emissions without sacrificing economic growth. The governments that help meet those energy needs will inevitably acquire political influence as well.

That is where the new trilateral agreement comes in. The partnership builds on the strategic foundation laid at the 2023 Camp David summit, where Washington, Tokyo and Seoul committed themselves to

unprecedented cooperation. Since then, the three allies have expanded their collaboration well beyond traditional defense to include supply-chain resilience, economic security, advanced technologies and critical infrastructure. Nuclear energy is the latest — and perhaps one of the most consequential — areas of cooperation.

The agreement envisions much more than exporting reactors. It calls for coordinated financing, standardized reactor designs, industrial partnerships, workforce development and technical assistance for countries considering nuclear power. Washington has pledged additional funding through the State Department's FIRST program to help Indo-Pacific governments develop the regulatory and technical capacity needed to deploy SMRs safely and securely. American, Japanese and South Korean companies are also expanding com-

mercial partnerships intended to speed deployment.

The logic is straightforward. The United States remains a leader in advanced reactor design. Japan continues to manufacture many of the high-value components essential to nuclear power plants. South Korea has earned a global reputation for constructing reactors efficiently and competitively. Each country possesses strengths the others lack. Acting together allows them to compete more effectively against state-backed Chinese and Russian rivals than any could alone.

SMRs themselves are particularly attractive because they promise greater flexibility than conventional nuclear plants. Their smaller size makes them better suited for islands, industrial parks, remote regions and countries with relatively modest electrical grids. If the technology matures as expected, SMRs could dramatically expand

access to carbon-free electricity while reducing dependence on fossil fuels.

But this is not simply a race to sell reactors. It is a competition over standards, supply chains and political relationships. Who supplies the fuel? Who trains the engineers? Whose safety regulations become the international norm? Which companies maintain the reactors over the next 60 years? These questions carry strategic consequences every bit as significant as the initial construction contract.

The partnership, however, begins with its own challenges. The United States continues to struggle with delays and cost overruns in domestic nuclear construction while rebuilding portions of its nuclear supply chain. Japan is still grappling with the political legacy of the Fukushima disaster and public skepticism toward nuclear power. South Korea hopes to expand its role throughout the nuclear fuel cycle, an ambi-

tion that has occasionally created friction with Washington.

Nor are SMRs without risks. Their widespread deployment will require robust systems for fuel supply, waste management, licensing, safeguards and international monitoring. Any effort to expand reactor exports must be matched by equally rigorous commitments to nuclear safety, security and nonproliferation. Otherwise, today's strategic opportunity could become tomorrow's security problem.

Cooperation

Yet the broader significance of the agreement lies elsewhere. For years, trilateral cooperation among the United States, Japan and South Korea produced ambitious summit communiqués but relatively few lasting institutions. This agreement marks a shift from diplomatic declarations to practical cooperation. If successful, it could create an enduring framework linking governments, industry and finance that survives changes in political leadership in all three countries.

That institutional durability may prove to be its greatest achievement. We often think of great-power competition in terms of aircraft carriers, missile defenses and semiconductor factories. Increasingly, however, geopolitical influence is being built through electrical grids, supply chains and infrastructure that will shape national economies for generations.

For Japan, that realization carries particular urgency. Facing an increasingly assertive China, Tokyo cannot rely solely on military deterrence to preserve a favorable regional balance. Economic statecraft, technological leadership and trusted infrastructure partnerships have become essential components of national security.

The countries that build tomorrow's reactors will do more than generate electricity. They will establish technical standards, shape supply chains, train future generations of engineers and forge political relationships that endure long after today's governments have left office. The competition now unfolding across the Indo-Pacific is therefore about far more than energy. It is about who will help define the region's strategic order for the rest of the century.

Varuna Shankar is head of government relations at India's World Magazine in New Delhi and a nonresident fellow at the Pacific Forum.

Don't Buy Zuckerberg's 'good guy of AI' act

DAVID LEE
BLOOMBERG

After seeing a video of Mark Zuckerberg sparring with a UFC champion on a barge in the middle of Lake Tahoe, you might be inclined to dismiss his recently published man-of-the-people essay.

In it, he tries to position his company — which is paying out hundreds of millions of dollars in damages for harming children — as the AI company that will fight for you, me and everything society cares about (such as earning a living).

Unlike competitors such as Anthropic and OpenAI, Zuckerberg wrote in more than 6,500 words, Meta Platforms Inc. is building AI "primarily" for people rather than companies, governments and institutions; those other AI labs have compromised incentives and must not amass too much power or tyranny awaits. He might be right, though to suggest his company's "personal superintelligence" — whatever it ends up being — will therefore end up any better for humanity than those rivals is a stretch to say the least.

For starters, on the question of building open or closed AI models, he has now flip-flopped twice, which I suppose leaves him back where he started, only now claiming, with a straight (and rather sunburned) face, that his company had never wavered in this belief. In truth, Zuckerberg's focus on AI, much like his apparent political views, has whipsawed from open to closed depending on Meta's failings and the trends of the day.

The most recent chatter in AI circles has focused on how Chinese open-weight mod-

els — which can be more highly customized and run independently of their initial creators — are growing in capability and cost efficiency. To keep up, we should make it easier and cheaper to make and release open-weight models, Zuckerberg argues, by permitting controversial practices like distillation — the process of training one model with another, which some AI labs vehemently oppose.

This attempt to position Meta as a champion of decentralized technology is comical. Zuckerberg must assume that everyone has forgotten that at one point Meta's strategy in the developing world was to essentially centralize the internet through its thankfully ill-fated Internet.org project. Closed systems and control are in Meta's DNA. Put it this way: the only reason Meta isn't talking up an all-powerful closed AI model for businesses, governments and institutions is that it has so far failed to build a competitive one.

So, Zuckerberg's strategy is to use his company's history of providing a free tool to billions as evidence he can and will do the same with AI. Then, for more proof of the positive impact Meta's "personal superintelligence" can have on real people, Zuckerberg points to Richland Parish, Louisiana, where teachers received a \$50,000 bonus thanks to a tax windfall from a Meta data-center construction project. Not bad in a region where the average teacher pay is \$40,920, according to the Shreveport-Bossier City Advocate. Who could be against that?

What Zuckerberg didn't mention were the state sales tax breaks Meta receives for building the data center. Nor did he talk about

how the company managed to reduce its overall effective U.S. federal income tax rate to just 3.5% in 2025, according to the Institute on Taxation and Economic Policy. He also doesn't mention that teachers must be mindful the golden goose will expire once construction stops — long before the facility stops generating billions of dollars for its operator.

He did, however, announce the creation of a new \$1 billion Future Is for Everyone Fund which will go to ... it's not quite clear. Concrete details of this are, naturally, scant — \$1 billion doesn't exactly go far in the AI game — and it doesn't speak to how that support should adapt and grow as the supposed revenues of AI begin to materialize.

We know, of course, why this charm offensive is happening. Across the U.S., voter sentiment toward AI companies and the data centers they want is in the dirt. Sweeping moratoriums against construction are being laid down, with more planned. Political candidates with a solid stance against the huge, power-hungry facilities are winning across the spectrum and Zuckerberg — who seemed to at least consider a presidential run, back when he was somewhat popular — knows all too well that the clock is ticking to reverse some of this bitter discourse as the U.S. nears November's midterms.

For those not convinced by the do-gooder routine, Zuckerberg's essay offers a predictable stick to go with the carrot: He writes that "any policy" that delayed AI development for "even a month," whether through regulatory oversight of new models or slowed infrastructure build-out, would see China



Meta CEO Mark Zuckerberg gives the keynote speech during the Meta Connect annual event, at the company's headquarters in Menlo Park, California, in September 2024.
REUTERS

march ahead. He outlines a way around this through "collaboration" — which, in Silicon Valley speak, is another way of making sure innovations happen on the companies' terms, nobody else's.

After the midterms, moratoriums will likely be lifted only after local jurisdictions are satisfied that companies are paying their fair share on a sustainable basis. If Zuckerberg thinks a short-term tax windfall and a loosely defined \$1 billion pledge can satisfy this demand, he is wrong. It can come only from new taxation fit for the economics of the AI era, not voluntary

handouts whenever companies need a quick PR victory.

Between the lines, Zuckerberg's meandering essay betrays more than its author probably intended, for what it reveals is a man far removed from what the public wants — or rather, doesn't want — from his AI efforts. He doesn't seem to understand the visceral opposition to his intrusive smart (or "pervert") glasses, for starters, and seems oblivious to how out of touch his suggestion to use AI to pick recipes to bake with his daughter, and then automatically order the ingredients, reads to anyone who

knows the fun (and developmental purpose) of achieving those tasks together like human beings.

Even if you don't care about that touchy-feely stuff and would rather focus on the investment opportunity of Meta's AI, Zuckerberg's bloated essay exposes again how his "personal superintelligence" strategy is more buzzword than progress, an ill-defined strategy that seems to change course from one day to the next.

Dave Lee is Bloomberg Opinion's U.S. technology columnist.

Hopes for the North Korean Human Rights Act of 2026

U.S. lawmakers move to revive North Korean human rights act amid worsening abuses

EUNSOOK JANG
THE DIPLOMAT

Since the COVID-19 border closures sealed North Korea off from the world, and as the China-Russia-North Korea axis has deepened, the North Korean people have become more isolated and vulnerable than at any point in recent memory.

In this grim period, one piece of encouraging news stands out: Just recently, U.S. Sens. Tim Kaine, D-Va., and Dan Sullivan, R-Ak., introduced the bipartisan North Korean Human Rights Reauthorization Act (NKHRA).

Growing up in North Korea, America was my enemy — alongside South Korea, the U.S. is one of the two principal adversaries the state taught us to despise. I was taught that American missionaries had pressed the word “thief” into an innocent boy’s forehead with caustic acid. We called Americans “wolf-like Yankee imperialists”

The Americans had been fighting for people they would never meet, in a country they were prohibited from entering, for decades.

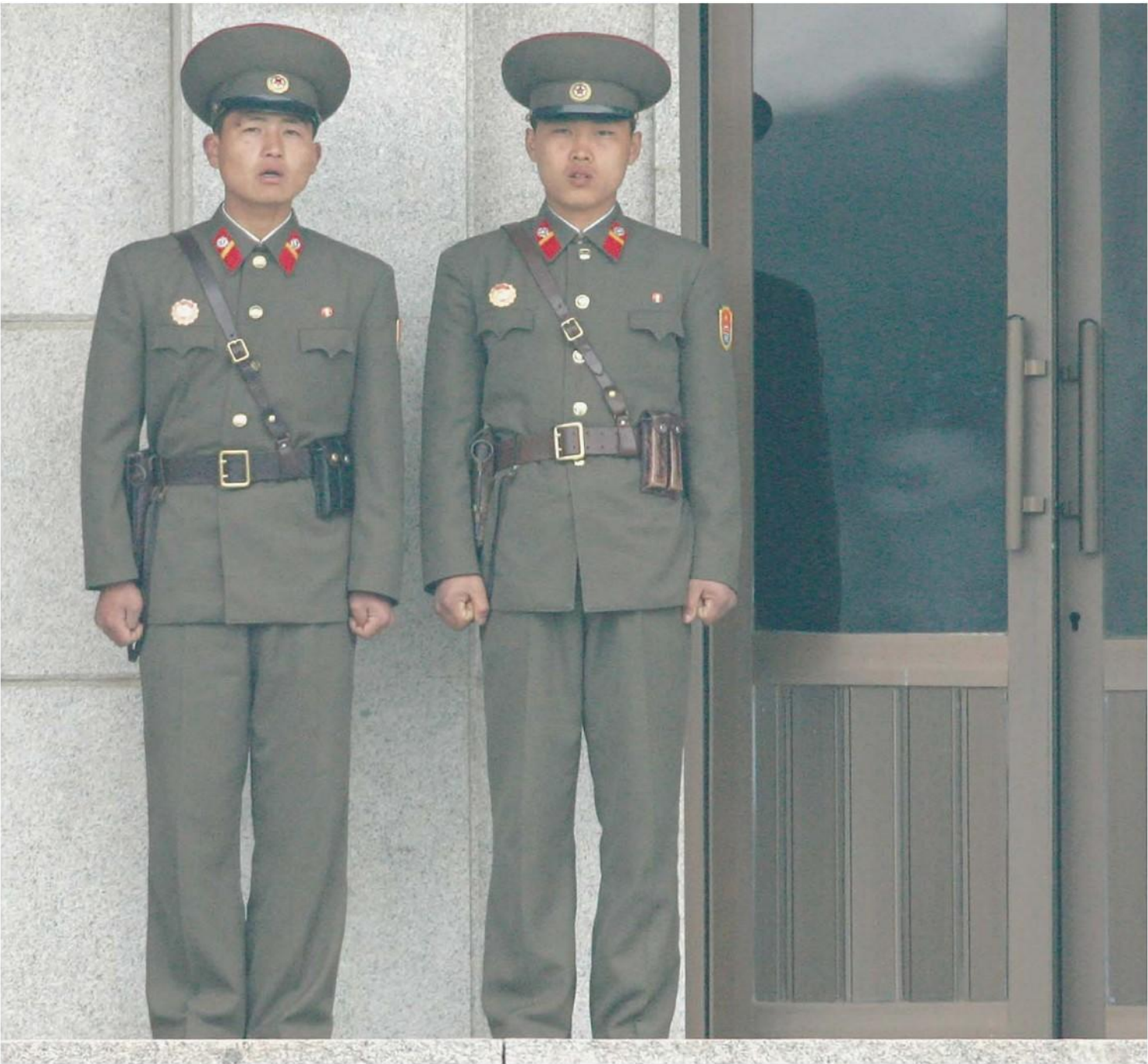
and were told they sought to swallow the Korean peninsula whole.

When I escaped in 2013, I carried that conditioning with me — until American volunteers with no family ties to North Korea, no personal stake,

no obligation, wept and prayed alongside me for the family I had left behind. And as I slowly learned the truth about the outside world, I discovered something that humbled me entirely: the very government I had been raised to fear had passed the North Korean Human Rights Act in 2004, becoming the first country in the world to formally recognize that what was happening inside North Korea was not merely a political problem, but ongoing crimes against humanity. The Americans had been fighting for people they would never meet, in a country they were prohibited from entering, for decades.

The North Korean Human Rights Act, or NKHRA, expired in 2022.

On June 25, Sens. Kaine and Sullivan reintroduced the NKHRA, signaling Congress’s continued commitment to advancing the rights of the North Korean people. This effort to revive the NKHRA legislation is part of a long bipartisan tradition. In the House of Representatives, Rep. Young Kim, R-Ca., and



many others have worked persistently to reauthorize the NKHRA.

And as a congressional staffer explained during a meeting at this year’s North Korean Young Leaders Assembly (NKYLA), the gap since 2022 has not reflected a lack of American commitment to North Korean human rights — the tenure of Special Envoy Julie Turner from 2023 to 2025 demonstrated that clearly — but rather is a matter of tim-

ing between the legislative and executive branches. The commitment has endured; the legal architecture must now be restored.

The 2025 update to the U.N. Commission of Inquiry on Human Rights in the DPRK confirmed that conditions inside North Korea have deteriorated sharply. Consuming foreign media can now result in public execution. Political prison camps continue to hold tens of thousands under condi-

tions amounting to ongoing crimes against humanity.

The deepening alignment of China’s leader, Xi Jinping, Russian President Vladimir Putin and North Korean leader Kim Jong Un has further shielded the regime from international accountability — and as that axis tightens, the window for outside engagement with the North Korean people grows narrower.

North Korean soldiers stand guard in the truce village of Panmunjom in the demilitarized zone separating the two Koreas in Paju.
REUTERS

Reauthorizing the NKHRA is the right first step. But it should be accompanied by meaningful action across several fronts.

First, the NKHRA should expand support for information access. A single piece of outside information can dismantle years of state indoctrination. As North Korea’s isolation deepens, the quality of information reaching its people matters as much as the quantity. Future efforts should prioritize substantive content that helps ordinary North Koreans understand the failures of their own political, economic and social systems — equipping them not only to question what they have been told, but to envision what a different Korea could look like.

Second, the United States and South Korea should simultaneously appoint special envoys for North Korean human rights — positions that have both sat vacant for years. The previous pairing of U.S. Special Envoy Julie Turner and South Korean Special Envoy Lee Shin-wha demonstrated what coordinated bilateral engagement can achieve. That synergy must be restored.

Third, young North Korean defectors, such as members of NKYLA — now professionals, researchers, lawyers and civic leaders in democratic societies — must be brought into the policy process as genuine partners, not symbolic witnesses.

Finally, the forced repatriation of North Korean refugees in China must remain a central concern of international human rights diplomacy. Every North Korean returned to the regime faces severe punishment — often imprisonment or death. Greater international attention and explicit provisions in the reauthorized Act can raise the diplomatic cost for China of continuing this practice.

America was the first country to legislate on behalf of the North Korean people. It did so not because North Koreans asked but because the United States chose to see our humanity when our own government denied it. To the senators, representatives and American citizens who have sustained this commitment across more than two decades: on behalf of those who cannot yet speak for themselves, thank you. The North Korean people see what you have done, even when they cannot thank you themselves.

Eunsook Jang holds a bachelor’s degree in political science from Korea University and a master’s degree in international development from Brandeis University. A Fulbright Scholar and North Korean defector, she is currently a research intern at a leading think tank in Washington where her work focuses on human rights in Asia, North Korean and Asia-Pacific policy development and post-reunification development planning for the Korean Peninsula. ©2026, The Diplomat

MeToo part deux is coming to U.S. politics

ERIKA D. SMITH
BLOOMBERG

In the weeks after Graham Platner was forced to halt his Senate campaign in Maine, his career in tatters after a rape allegation, the Democratic Party has been trying to move on and forget about the oysterman’s problematic candidacy.

But if the activists who helped engineer Platner’s ouster have it their way, he won’t be allowed to fade into obscurity. Instead, he’s likely to be held up as both a cautionary tale and a harbinger.

At least this is the sense one gets from talking to Cheyenne Hunt, chief executive of the upstart nonprofit Reckoning Action. The Democratic strategist and influencer is arguably the person most responsible for the downfall of Platner as well as Eric Swalwell, a former San Francisco Bay Area congressman who ended his bid for California governor in April after being accused of sexual misconduct. (Both Platner and Swalwell deny the allegations against them.)

It started with Hunt’s decision in late March to share a video on TikTok and Instagram about the alleged sexual harassment that a friend said she endured from Swalwell. That led to more women contacting Hunt, first about Swalwell and then Platner. Hunt spent months counseling them on messaging strategies and connecting them with lawyers and journalists. If not for Hunt, Jenny Racicot, who said Platner drunkenly raped her while they were dating in 2021, probably wouldn’t have spoken with Politico, which published the story that forced him to drop his Senate campaign.

To hear Hunt tell it, American politics is entering another high-profile MeToo era — a MeToo Part Deux, if you will — this

one girded for a more complicated online world of AI slop and TikTok narratives (and counternarratives).

Expect more powerful men in politics to be targeted, their checkered pasts dug up and amplified online. Depending on who exactly is in Reckoning Action’s crosshairs, it could have ramifications for this year’s midterms and for the all-important presidential and congressional elections in 2028.

“We’re working to ensure that all of the places where misogyny is manifest in American public life, there is a clear response,” Hunt told me when we spoke in July.

If that sounds overly aspirational, that’s understandable. In recent years, conventional wisdom has been that MeToo is dead. The manosphere is thriving. Tradwives are in; feminism is out.

Perhaps this is why Gretchen Carlson, the former Fox News journalist who in 2016 sued the network’s then-CEO Roger Ailes for sexual harassment, recently felt the need to write an op-ed for the New York Times, challenging the notion that her work and that of other women activists had been for naught.

“The #MeToo movement has achieved crucial legal reforms across the country and around the world,” Carlson wrote, citing laws restricting the use of nondisclosure agreements and forced arbitration. “As a result of those reforms, millions of workers have stronger rights and protections to speak up against their abusers.”

Still, there’s a long list of once-canceled men who’ve returned to the limelight. Chief among them, of course, is Donald Trump, who was re-elected president despite having been found liable for sexual abuse in a civil trial. Even the bipartisan outrage over disgraced financier and sex offender Jeffrey

Epstein hasn’t led to much justice for the many survivors of his abuse.

Yet it’s also hard to argue with what Hunt has accomplished in a few short months.

It was Swalwell’s resignation from Congress in April, along with that of similarly accused Texas Republican Tony Gonzales, that led House Speaker Mike Johnson and Minority Leader Hakeem Jeffries to create a bipartisan task force to come up with legislative solutions for sexual misconduct at the Capitol. That, in turn, has led to work for Hunt and Reckoning Action.

Recently, Johnson told Axios that he supports one proposal under consideration that would ban members of Congress from having romantic or sexual relationships with Capitol Hill staff. “We should, at a bare minimum in Congress, have, you know, rules and traditions that are adhered to in corporate America, so that’s an easy one for me,” he said.

Hunt called that good news, telling me it’s “part of our effort,” along with reforming campaign finance laws so that donations can’t be used to hire private investigators and criminal defense attorneys for sexual assault and harassment cases.

Indeed, the 29-year-old Hunt, who lives in Southern California and was an intern for Minnesota Sen. Amy Klobuchar before briefly leading the advocacy nonprofit Gen Z for Change, has lofty goals.

To keep “predators out of power,” she wants Reckoning Action to be a “rebuttal to the cultural resurgence of misogyny that we’ve seen in the last 10 years” under Trump and to “reframe the conversation that we’re having culturally about American women and what they deserve.” That’s a “narrative change battle” that must be fought online, where the influencers and podcasters of the



#MeToo protesters march in support of survivors of sexual assault in Hollywood, California, in November 2017, the year the movement kicked off globally.
REUTERS

manosphere wield outside influence over voters and, as such, the nation’s political agenda.

Asked if there’s a risk of going too far to root out misogyny, triggering another backlash to MeToo (which arguably birthed the manosphere in the first place), Hunt demurred: “We don’t see the backlash as like some kind of sign of failure or something that’s to be avoided.”

She also seems unconcerned about whether a renewed focus on attacking problematic men will distract from Democrats’

focus on affordability. Or whether it will complicate the party’s ham-handed attempts to demonstrate it cares about men by dabbling in anti-feminist bro culture.

Democrats want to win back the young male voters who bolted to Republicans in the 2024 election, helping send Trump back to the White House. Polls show that demographic is now abandoning Trump in droves, disappointed (like most Americans) by the escalating economic costs of his presidency. But Democrats are still struggling to win them over.

As one male voter told the Democratic-led Speaking with American Men project, Democrats embrace “the fluid masculinity of being, like, empathetic and sensitive,” while “Republicans are more like, the traditional masculinity of a provider, strong and the machismo type.”

A MeToo Part Deux won’t address that. But at least we’ll have fewer Platners and fewer Swalwells in politics.

Erika D. Smith is a politics and policy columnist for Bloomberg Opinion.

THE AUSTRALIAN

Pivotal moment as China flexes its muscles in Pacific

Much is at stake at Palau's summit and in the push against Wale

Beijing's ambitions in our region appear to be at work in the attempt to scuttle the Pacific Island Forum leaders summit in Palau this week and the no-confidence motion aimed at driving Solomon Islands' recently installed pro-Australian, anti-Chinese Prime Minister Matthew Wale from office. Both developments in the protracted saga of brazen Chinese attempts to bend island nations to Beijing's will present challenges that leaders gathered in Palau must work together to defeat, fully aware of China's agenda.

As Ben Packham reported on Monday, Mr Wale was forced to return home after a motion of no confidence was filed against him in Honiara. Fiji Prime Minister Sitiveni Rabuka is also absent from the summit, along with Kiribati President Taneti Maamau, Vanuatu Prime Minister Jotham Napat and Samoa Prime Minister La'auli Leuatea Schmidt. Their withdrawals followed confirmation that Taiwan would be represented, a move that infuriated China. Beijing believes that despite decades-long close developmental co-operation between Taiwan and Pacific Island states, Taipei's representatives should be barred from being even observers at such gatherings. To his credit, Palau's pro-Western leader, Surangel Whipps Jr, the summit host, took a different view despite what he said were "threats" from Beijing and a virulent Chinese social media campaign against his small nation.

Chinese anger has remained relentless. And as Anthony Albanese, Pacific Island Affairs Minister Pat Conroy and Climate Change and Energy Minister Chris Bowen were arriving in Palau on Monday, the withdrawal of the strongly pro-Chinese leaders of Vanuatu and Kiribati and the moves to dump Mr Wale amplified the depth of Chinese fury.

The attempts to remove Mr Wale, who came to office in May after winning a parliamentary vote of no confidence against his pro-Chinese predecessor, Jeremiah Manele, is particularly egregious. He has moved with speed to reverse the trajectory Solomon Islands had been on towards becoming a full-blown Chinese client state

with potentially a military base for the People's Liberation Army on Australia's doorstep. He has retreated from the close ties with Beijing developed by his predecessors Mr Manele and Manasseh Sogavare, a Seventh-Day Adventist elder. Mr Wale also has been negotiating a new bilateral treaty with the Albanese government aimed at enshrining Australia – not China – as his country's foremost security partner in the region. That has been too much for Beijing and its fellow travellers in Honiara, notably Home Affairs Minister Manasseh Maelanga. Despite being a recently ordained Anglican priest, he has a long history of slavish support for closer ties between Honiara and communist China. Mr Maelanga took advantage of Mr Wale's trip to the Palau summit to make his move, lodging a no-confidence motion in the Prime Minister that will be decided later this week.

It will be highly unfortunate for Solomon Islands and the region if Mr Wale is defeated. His work in dismantling Chinese influence in his nation, including Beijing's public security enforcer, has been exemplary. His emergence has coincided with other significant developments that have helped the Albanese government achieve remarkable success with its Pacific policy and initiatives. These include signing vital bilateral defence treaties with Fiji and Papua New Guinea, treaties with Nauru and Tuvalu, and even an agreement for co-operation with Vanuatu despite its ties to Beijing.

Much will be at risk, however, if the Palau summit allows itself to be spooked by Beijing's bullying and the Honiara parliament votes for Mr Maelanga's ill-judged push to force Mr Wale from office. This is no time for Pacific leaders to allow themselves to be browbeaten by China. Mr Albanese, Mr Conroy and Mr Bowen will be doing all they can to help PIF leaders resist Chinese coercion. Beijing's efforts to undermine the summit by getting its close allies to stay away, and to depose Mr Wale, are a watershed moment in dealing with China's ambitions in the region. For Australia, the stakes are enormous.

Personal attacks help One Nation

Grievance party must be challenged on policy and ability to govern

Like all politicians, Pauline Hanson, One Nation's elected members and candidates warrant scrutiny on policy grounds and their fitness to govern. Lack of coherence among what is still a small parliamentary team is also a problem. But Senator Hanson has a point when she says Anthony Albanese and Jim Chalmers crossed a line at Labor's Queensland conference on Sunday when they branded their democratically elected One Nation opponents as "dangerous" and "threat to our country".

As she said, words have consequences. In a different political climate, Hanson's claim "That is how political violence is incited" would be overblown, but in an era when social cohesion is under threat amid violent public protests, and the murder in Britain of serving and former MPs – Conservative minister turned Reform UK member Ann Widdecombe in July this year, Conservative David Ames in 2021 and Labour's Jo Cox in 2016 – her concern is justified.

The Prime Minister's declaration of war on right-wing populists for "peddling dangerous, divisive and dishonest" politics was regrettably one-sided. The left is no less guilty, sometimes more so, including acclaimed author Richard Flanagan, who told the Festival of Dangerous Ideas that antisemitism was "Nowhere. Nowhere. Nowhere" in the Bondi massacre. Flanagan also claimed an "Israel lobby" had politicised

the tragedy. Senior staff from the taxpayer-subsidised National Association for the Visual Arts, the nation's peak lobby for the arts, also have crossed dangerous lines celebrating the October 7, 2023, massacre that killed 1200 people in Israel and dismissing concerns for Jewish safety as a "reactionary Zionist dog whistle".

Senator Hanson has a point when she says it's time to turn down the temperature. Mr Albanese and the Treasurer also need to understand that decades of experience show personal attacks against Senator Hanson invariably backfire among potential One Nation voters. In 1996 she was widely mocked when, answering a reporter's question about xenophobia, she responded: "Please explain." It became her catchphrase and is the title of her own YouTube channel.

That said, vigorous debate over the most important challenges facing the nation – the economy, productivity, security and defence and social policy – is a hallmark of our robust democracy. One Nation's expertise in most of those areas is threadbare. Where they exist, its policies are more about articulating voters' frustrations and grievances than effective, detailed blueprints for action.

For a party leading in first-preference voter intentions in Newpoll, that is its achilles heel, and we will continue to call it out. But the nation's contest of ideas is no place for personal attacks.

Home battery scheme going flat

Climate Change and Energy Minister Chris Bowen has taken to highlighting the nation's world-leading deployment of home batteries as proof that the Albanese government is getting on with the job of decarbonisation. Unfortunately, like the Rudd government's home insulation scheme before it, the \$8.5bn home battery scheme is proving to be more difficult in reality than it appears in the glossy political brochure. First it was the risk of house fires from dodgy installations and now comes reports the scheme is not fit for purpose because some suppliers have been cutting corners to deliver a cheaper product.

The fact is offers of free government money will often attract the unscrupulous. And households interested in what they think is a bargain will gravitate towards the cheapest available option. In the case of home batteries, this can include installations that don't include all of the features necessary to operate efficiently all of the time. As Noah Yim reports, customers are being asked to fork out hundreds of dollars a year to wrap and unwrap home batteries in a special-purpose blanket so they can operate in winter. Without insulation, the batteries don't operate in a way that benefits the household or the grid. A popular choice of battery for homeowners throttles itself at

low temperatures and stops charging below zero. Left wrapped in summer the batteries risk overheating.

The manufacturer says this is how the battery is supposed to operate and was a common design decision across the industry. This is bad news for affected households and bad news for the energy grid, which is meant to benefit from homes with batteries at least taking care of their own needs in peak times such as cold snaps. The problem gets worse, however.

Taxpayers as well as homeowners have a right to expect good service from the \$8.5bn being spent putting home batteries on private dwellings around the nation. But the fact is many who have received a big government subsidy for their battery are reluctant to share it with the grid operators. The idea of batteries being there to help prop up demand at peak times is illusory, or at least limited, if the grid does not have access to the battery when it needs it most.

Already at the top of the cost curve in terms of what it costs to save a tonne of greenhouse gas emissions, home batteries look better on paper than in reality for the grid. One day, when it comes to energy, the government will have to get back to investing in stuff that can actually get the job done.

LETTERS

By-election makes no secret of the depth of anti-Labor feeling

The Secret Harbour by-election has confirmed what the Farrer electorate suggested: that Labor is no longer regarded as the people's party.

Anthony Albanese's call to end political division may be aimed at One Nation, but it is Labor's own policies and ideologies that are causing division. It started with the voice, then lack of action on antisemitism, followed by "reverse Robin Hood" energy policies where the wealthy are rewarded by subsidies at the expense of the less well-off. Add to this a medical benefits policy that hits pensioners and taxes that hurt superannuants.

Let's not forget migration and housing policies as well. Voters see that Labor is the cause of division in our society. They want unity, and Labor won't give it to them.

Tom Smith, Bowral, NSW

Geoff Chambers nailed the irony of Anthony Albanese's rhetorical attack on One Nation after Luke Herdegen's significant win of Labor's Secret Harbour seat in Western Australia ("Home truths on a divided nation", 31/8).

The authentic tone of this One

Nation candidate signalled that our politics is at a turning point.

Sigmund Freud's theory of projecting one's defects on to others was vindicated in Albanese's reaction. He was on an alliteration roll of unwitting self-disclosure about Labor's own shortfalls. He perceived right-wing policies as "dangerous, divisive and downright dishonest".

Betty Cockman, Dongara, WA

I read with increasing incredulity the comments by the Prime Minister. He was accusing the hard right of peddling politics that is "downright dishonest" and peddling "misinformation and disinformation". This from the man who "changes his position" on a regular basis and has little or no idea of how tough it is for the average Aussie.

Elizabeth Jobson, Tamborine Mountain, Qld

Accusations that One Nation is divisive are not only misguided, but clearly incorrect.

Pauline Hanson and her party have for years said we should aspire to embrace traditional Australian values such as egalitarianism, irreverence and

larrikinism, while at the same time evoking genuine patriotism and love of country.

These are the philosophies that defined Australia for most of the past 200 years.

It is the apotheosis of hypocrisy to suggest, as the extreme, hard left does, that they are trying to divide us when all its words and actions suggest otherwise.

Paul Wray, West End, Qld

We all know, including Pauline Hanson and her supporters, that One Nation will never govern the country – certainly not in the foreseeable future, anyway. But the best it can hope to do is influence government policy, at both the state and federal levels.

This is evidenced by the experience of independent politicians, plus other non-Labor and non-Coalition minority groups such as the Greens. And, in my view, that's not a bad thing, because it is part of the essential checks and balances.

Roy Stall, Mt Claremont, WA

One Nation has successfully tapped into growing public anger. But is it a party of grievance or a party capable of governing?

Identifying problems is easy;

cantly contribute to Australia's security?

Luke Tickner, Ascot, Qld

Power cost unknown

Energy Minister Chris Bowen has stated that he cannot release the costs taxpayers are incurring underwriting agreements under the Capacity Investment Scheme because of "commercial-in-confidence" principles.

I can accept that for individual contracts, but it does not preclude the minister from advising how many contracts have been entered into and the cost of underwriting these contracts. Given the Prime Minister's commitment to openness, he should instruct the minister to release these details so that we have the ability to make our own judgments as to the cost-benefit of pursuing renewables through this scheme.

Wayne Gibbings, Hazelwood Park, SA

Untamed inflation

Simon Benson is right to question Anthony Albanese's unrealistic optimism ("PM's fiscal furphies now an act of low deception", 31/8). Broad-based inflation has not been tamed, productivity keeps sliding and living standards are falling. The government's hard-left instinct to spend big during high inflation is ignorant of basic economic principles.

Rather than own the economy, the Prime Minister and Treasurer have criticised the Reserve Bank and the Productivity Commission for confirming the pressure households are trying to cope with. The result is our nation in economic decline, with costs ever rising and a debt tsunami future generations unfairly will



The Australian's front page, Monday, August 31

have to repay. This government needs to cease being ideological and return to the economic basics if it is to succeed in skilfully managing our economy.

Barry Fox, Blackburn, Vic

Double trouble

There is no doubt that Labor's fundamental lack of understanding of supply and demand thwarts any hope of rescuing our flailing economy, which continues to remain in a per capita productivity recession.

Not only is the supply side of housing stock undermined by the government's taxation disincentives but the consequential lower house prices squeeze the margins for developers and builders who are already struggling under the weight of inflation.

Gary Tait, Ormond, Vic

Insight on US, Ireland

I very much appreciated Helen Trinca's reports.

Her reporting of D23, the most

making difficult policy decisions is harder.

One Nation needs clear answers on four critical issues. 1. Housing – how will it become affordable? 2. Energy – what replaces current climate policy, and at what cost? 3. Government spending – what programs will be cut to fund tax reductions? 4. The economy – how will productivity, wages and living standards improve while debt and inflation are controlled?

Australia needs solutions, not simply grievances.
Robin Clarke, Ballajura, WA

The Prime Minister, Anthony Albanese, just doesn't get it.

He is blaming everyone except himself for the deterioration in his and Labor's popularity. It's not the forces of the right peddling divisive and dishonest messages, it is his and Treasurer Jim Chalmers' inflation-fuelling policies in the budget to which people are reacting. People are not imagining rising food prices, increasing rents and interest rate on their mortgage going up. And it is no coincidence much of this has occurred since the May federal budget.

Tim Sauer, Brighton East, Vic

LAST POST

If you wish to save Australia's democracy from One Nation, Prime Minister, I suggest the first step is to do a much better job of governing the country.
Geoff O'Brien, Eltham, Vic

Did Anthony Albanese deliver his line referencing "right populists" that "they'll say anything or do anything to win votes"? I couldn't stop laughing.
Kingsley Sullivan, Mt Hawthorn, WA

"Dangerous, divisive and downright dishonest", Albanese says of hard-right populists. Be careful, Prime Minister; those words could equally apply to your party. Take your own advice and dial down the rhetoric.
Julie Winzar, Palm Beach, Qld

Anthony Albanese gave a speech in Queensland exposing politicians who are "dangerous, divisive and downright dishonest" and who will "say anything and do anything to win votes". He said they would "bend any facts, peddle misinformation and disinformation". He was trying to characterise One Nation but that description fits his own politics to a T.
J. Pantoni, Armadale, WA

What a turnaround. Now if the Libs want to be in government in 2028, they might have to consider being the minor party to One Nation.
John Clark, Moss Vale, NSW

Secret Harbour is secret no more.
Roseanne Schneider, Toowoomba, Qld

It's a bit rich to hear Anthony Albanese describe right-wing politicians as dangerous, divisive and dishonest.
Tim Trotter, Brisbane

Albanese has declared some right-wing politics as dangerous, divisive and dishonest. Maybe hollow words? Albanese, a boomerang does come back.
Sam Staines, New Farm, Qld

The Prime Minister may well have declared war on One Nation but Australia has declared war on left-wing "progressives" peddling dangerous, divisive and dishonest policies.
Greg Paull, Yallingup, WA

Better the One Nation mistakes with developing its policies and migration numbers than the Labor playbook of "I've changed my position".
Neil Forbes, Cairns, Qld

I thoroughly enjoyed Helen Trinca's review of D23 ("Cosplay: Inside the Disney industrial complex", 29-30/8). Good on her for donning the mouse ears.
Graham Williamson, Burleigh Heads, Qld



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BOOKSHELF | LAURA HACKETT

Is therapy culture harming girls' mental health?

A few years ago Suzanne Garfinkle-Crowell began to notice a difference in the young female patients who arrived at her practice for therapy. They would casually reel off a litany of diagnoses: ADHD, depression, OCD, anxiety disorder. Her patients were fluent in the lexicon of therapy but they had lost the ability to name and speak about their feelings.

"Everything was evidence of a mental disease," she writes.

Rather than shun being told something was wrong, they were desperate for Garfinkle-Crowell to confirm these self-diagnoses, to receive the relief and validation that comes with a label.

In this thoughtful and nuanced book, Garfinkle-Crowell draws from her experience as a New York psychiatrist to tell the story of why members of the younger generation are turning to the language of mental illness to make sense of their distress. She traces how it is young women who are the chief victims of a patriarchal model of psychiatry that has a long history of dismissing them as crazy and hysterical.

She is by no means the only mental health professional to hit the emergency call button, to argue that our approach to mental health is making us all sicker.

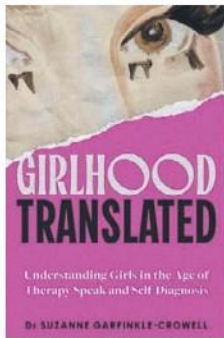
Two years ago, University of Oxford psychiatrist Lucy Foulkes, author of *Losing Our Minds: What Mental Illness Really Is (and What It Isn't)*, lit a firestorm when she published a paper questioning whether our well-intended mental health campaigns have had the unintended consequence of encouraging young people to pathologise mild forms of distress.

Mental health diagnoses are rising across all ages but it's the statistics surrounding adolescents that really aren't pretty. Last year more than one million children were referred to mental health services in England. The number has almost doubled in seven years. Cases of suspected autism rose by almost 50 per cent in that single year and ADHD by nearly a quarter.

In the US it's a similar story: one in five Gen Alpha children (that is, those born in 2010 or later) carries a mental, emotional or behavioural health diagnosis.

More young people than ever are in therapy, yet they're not getting any happier.

Garfinkle-Crowell specialises in wealthy and privileged young women in mild to moderate distress and seems to confirm an awful lot of borderline diagnoses. But is she really part of the prob-



Girlhood, Translated: Understanding the Lives of Girls in the Age of Therapy Speak
By Suzanne Garfinkle-Crowell
Simon & Schuster, 368pp, \$39.99

REVIEW

More book reviews in **The Weekend Australian**

lem? *Girlhood, Translated* makes a strong case for how today's therapists are not to blame. They are simply the ones mopping up the problems caused by the tyranny of wellness culture and a growing tendency to overpathologise.

Since the 1990s psychiatry has grown more medicalised. Rather than get to know a patient as a person, psychiatrists are under pressure to treat mental health as physical health and slap on labels and push pills. An expanding list of possible mental health conditions, destigmatisation and the lowering of diagnostic thresholds also have contributed to the rising tide of diagnoses, Garfinkle-Crowell argues.

These issues are well covered. Where Garfinkle-Crowell offers fresh insight is in unpicking why her patients have come to almost fetishise a mental health diagnosis. Girls today are pushed towards perfectionism and the idea that they should not burden others with their emotions, she writes. At some point they realise how invisible they have become, then they up the ante in turning to labels that social media has popularised and made desirable with slogans such as "Slay-DHID" or "Anxiety Girlies".

A diagnosis makes them feel

they are part of an important community of mentally unwell peers. They have absorbed the cultural message that they have "to be sick to be heard". None of which is any use in helping a therapist to figure out the source of unhappiness or distress, nor in giving patients a sense of agency.

The problem for Garfinkle-Crowell is that her caseload is confined to the uber-privileged, and they sometimes veer into dislikeable caricature. Still, she comes across as a compassionate therapist who really gets to know her patients. She holds on to the idea that it is important for every patient to imagine they are able to change. She dismisses "neuroessentialism" and the idea of blaming the wiring of one's brain as seductive crap that often halts the possibility of self-discovery.

When a parent pushes or rejects their daughter's diagnoses, she points out that what is important is not whether they meet the criteria but in finding out why they are having a hard time.

As a manual for any parent who wants to understand what their daughter is really saying when she tries to communicate that she is suffering, *Girlhood, Translated* is a very good one.

THE TIMES

GREG SHERIDAN

Why I was wrong about the Tampa affair

In the case of the Tampa incident, 25 years ago, John Howard established effective border control for Australia. At the time I thought he badly over-reacted to a small situation, but he was much more right than wrong. As a consequence, there's little illegal immigration to Australia by boat. The lasting tribute to the policy is that both sides of politics enforce it today.

But it was an incredibly messy, confusing process with lots of missteps, which is typical in democratic politics.

Tampa evolved thus: a boat-load of 438 mainly Afghan asylum-seekers left Indonesia bound for Australia. The boat got into trouble and was rescued by a Norwegian flagged vessel, the Tampa. Under normal practice they should have been returned to safe harbour in Indonesia. But the people on board threatened to harm themselves or the crew if not taken to Christmas Island. That would mean getting to Australia and settling here.

The Howard government took unprecedented, determined action to stop the Tampa landing at Christmas Island. It sent the SAS to take control of the Tampa. Alexander Downer secured the agreement of Nauru and the people were transported there for refugee claims to be processed.

The Howard government was determined nobody would get to stay in Australia permanently through arriving illegally by boat. A tiny number of the Tampa people eventually came to Australia but Howard killed the people-smuggling business to Australia.

The policies were unravelled under the governments of Kevin Rudd and Julia Gillard, and the boat flows started again in earnest. Remarkably, Tony Ab-

Tampa prefigured policies virtually every advanced Western nation would eventually attempt to run

bott repeated Howard's success, ending the people-smuggling trade a second time. Labor learnt its lesson and has subsequently embraced the Howard-Abbott policies.

So Tampa was a turning point in modern Australian history, a turning point for the Howard government, and prefigured the kinds of policies virtually every advanced Western nation would eventually attempt to run in relation to illegal arrivals.

These issues were then, and remain now, vexed and complex. Although I think Howard, for whom this column has the greatest admiration, got the policy basically right, there were two or three very bad elements to Australian government behaviour at the time. They were bad then and they remain bad in retrospect.

However, let me not hide in the shadows. I judged Howard far too harshly at the time and I was wrong about the basic need for national governments to assert full control over their borders.

Partly, my mistake, like a lot of commentators, was to fail to recognise the change in the nature of the refugee phenomenon.

I was a child of the Cold War and refugees were mainly folks escaping communist tyrannies. The first issue I ever wrote about as a journalist, the first issue I became passionately involved in myself, was trying to help our South Vietnamese allies and friends after their nation was invaded in 1975 by the North Vietnamese Army, with Chinese and Russian backing, while we and the Americans had deserted our brothers in arms.

Buddhists, Catholics and anyone associated with the former South Vietnamese government were persecuted by the communists. This was put into the shade by the communist genocide next door in Cambodia, but the situation in Vietnam was severe enough. Our worst prime minister, Gough Whitlam, refused to

take more than a tiny handful of South Vietnamese, even among those whose lives would be compromised or forfeit because of their association with Australia.

Whitlam demonised the Vietnamese refugees and famously declared: "I'm not having those (expletive) Vietnamese Balts coming into this country with their religious and political prejudices against us."

The United States led a magnificent international campaign to resettle Vietnamese refugees, who have been a fantastic success in Australia. This paradigm followed the pro-refugee sentiment in Europe after World War II and the collective feeling of searing regret and remorse that affluent nations had done so little to help Europe's Jews in the 1930s.

However, applying that paradigm to people movements in the 21st century was out of date, wrong on the facts, unworkable and morally confused. This century has seen massive movements of predominantly Muslim populations from North Africa and the Middle East. Some have certainly experienced persecution. Others are driven by economic considerations. Some exhibit desperation. This can be born out of persecution or poverty at home. But there can also be "positive desperation", the unbelievable reward of living in an affluent welfare society as opposed to a poor society.

Although I now think the Howard government was right to assert border control, and some of my columns at the time were mistaken, I'd have two substantial criticisms of the government's actions at the time that still stand.

First, it needlessly demonised the individuals on the Tampa, who were distressed human beings. Second, it was either unbelievably slack or some of its members, not Howard, were actively knowing in publishing an untrue story that another boat carrying asylum-seekers threw their children overboard to force the navy to rescue them. The children overboard story was not important in Howard winning the subsequent election but it wasn't true. Governments should be sedulous in telling the truth.

Here are some other facts worth noting. The Norwegian government harshly criticised Australia at the time. Yet Norway welcomes 500 UN-assessed refugees a year, compared with Australia's 20,000.

Most importantly, no human being died in the Howard operation, or in the later Abbott operation. Yet when Labor softened these policies and the boat trade resumed, hundreds of people drowned making the illegal journey. So who is the true humanitarian?

Also, the Indonesians couldn't say this publicly but they were actually happy, first with the Howard operations, even more so with Abbott's. This was evident in their quiet co-operation with elements of both sets of policies. I had the great pleasure of interviewing Susilo Bambang Yudhoyono several times when he was president of Indonesia. At the end of his tenure, a person in his administration, as close to the president as any human being could be, told me off the record how happy the president was with Abbott's policies because they solved the problem, for Australia and for Indonesia.

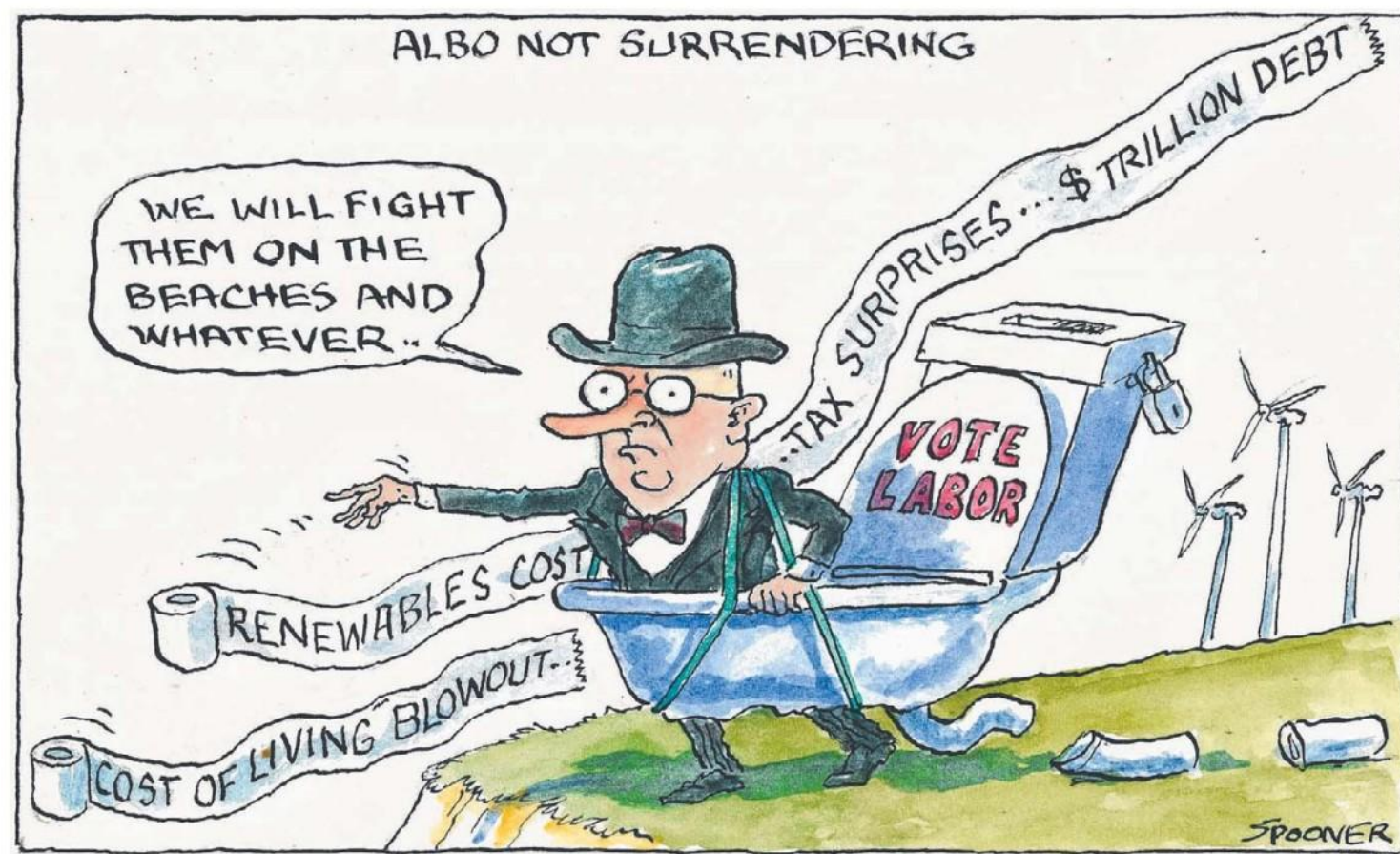
In all Western nations courts have undemocratically hindered democratic governments from taking reasonable policy actions, a huge part of the problem.

Finally, while the overwhelming majority of Australia's Muslims are good citizens, unregulated Middle Eastern immigration to Western countries has not been an unqualified success. The long traditions of Islamist antisemitism and extremism have posed real problems.

All countries now want to control their borders. Howard was ahead of the game. The nation is in his debt.

Greg Sheridan is *The Australian's* foreign editor.

DAILY CARTOON | JOHN SPOONER



JUDITH SLOAN

ALP migration cut is more slogan than substance



You know the line: the Albanese government has reduced net overseas migration by 45 per cent. It will be taking a balanced approach to refining the immigration settings while acknowledging the important role played by skilled migrant workers. Those are the talking points.

The truth is the Home Affairs Minister is having a great deal of trouble ensuring that the target for the NOM of 245,000 this financial year is reached and 225,000 in subsequent years. Recall here that the NOM is the difference between long-term arrivals and long-term departures, where long-term is defined as at least 12 months in a 16-month period.

Changes to visa requirements can alter the number of arrivals, although they need to be quite radical to change the number to any significant degree. Hiking up visa fees, something the government has done, also can have a marginal effect on arrival numbers.

For those already in the country on temporary visas, however,

the challenge is even greater as the scope for temporary visa holders, with the help of lightly regulated migration agents, to game the system to stay is considerable. The government needs to focus on both sides of the equation.

So let me help here and outline a series of sensible changes that will bring down the NOM while making sure immigration is beneficial for all of us and not just for sectional interests. It is important that the addition to the population flowing from immigration is reduced, and quickly. Not only is the pressure on housing and other resources unacceptable, the stress on social cohesion is also palpable.

Let me start with working holiday makers. Their number has exploded from 41,000 in mid-2022 to 237,000 earlier this year. This surge in numbers is principally the result of a special deal obtained by the British government, which enables British passport holders to secure three visas, each of one year's duration. There are no requirements for them to undertake

regional employment. The first obvious change is to reinstate the requirement for regional employment for all working holiday maker visa holders. Six months in a 12-month period would seem appropriate. British working holiday makers currently are working in bars in Bondi and driving Ubers in Melbourne, not picking fruit in the regions.

While the number of international student visas has levelled off in recent years, the total number is still excessive. Earlier this year, there were more than 600,000 student visa holders plus another 267,000 on graduate visas. This latter figure has more than doubled from the pre-Covid figure, with the number of secondary applicants rising more rapidly again.

There are several changes that can be made to the rules governing student visas that would cut the number of applicants as well as reduce the amount of gaming that goes on. Changes to enrolment – from a university course to a vocational course, for instance – would not be permitted, leading to cancellation of the visa. Any further visa application would need to be made offshore.

Only international students undertaking PhD level study would be allowed to bring partners and children. All other international students would have no right to attach secondary applicants to their visas. This would align Australia with several other countries that admit large numbers of international students.

There may be a case for abolishing graduate visas altogether. It is not unreasonable to expect international students to return to their home countries once they have finished their studies.

To be sure, there are some courses that require a subsequent year of internship or equivalent to qualify, so there may need to be some exceptions.

Bear in mind here that about

one-third of international students undertake courses in commerce/business/management, double the proportion of local students. These courses generally do not require formal internships after graduation.

The number of skilled employment temporary residents also has exploded, with the most recent numbers recorded at 260,000. Employers can sponsor workers with skills on the skilled occupation list, with visa holders able to stay for at least four years.

The distinct impression is one of an unwillingness on the part of employers to train local workers, resorting instead to the easier option of importing already trained

It is telling that there is no accelerated pathway for imported construction workers given the clear shortage

workers. The content of the list is difficult to understand, with more occupations simply being added over time. But it is telling that there is no accelerated pathway for imported construction workers given the clear shortage of trades across the country. Increasing the minimum salary that migrant skilled workers must be paid also should be considered as a policy option.

Reducing the humanitarian intake to its long-term level of 13,750 a year is a sensible change. This would cut the intake from the current figure of 20,000 plus community-sponsored refugees.

While this change was floated and then ruled out by the Albanese government, the sheer size of the fiscal drain associated with the refugee intake makes this a compelling adjustment. According to

Treasury figures, those on humanitarian visas impose a lifetime fiscal cost of \$367,000 each.

Restricting the number of new entrants is one thing; getting those on temporary visas to leave is another thing. Deducting New Zealanders who have a right to be here, there are about 2.3 million temporary visa holders living in the country. Setting a target of the ratio of temporary visas to the population – 5 per cent, say – would be a good policy guide.

Australia is essentially seen as a soft touch, with temporary migrants able to legitimately string out their residence for well more than a decade. Why pay a people-smuggler when you can simply fly in? Illustrating this mess is the rapidly rising number of temporary migrants on bridging visas; the total number exceeded 400,000 this year.

There are several changes that would accelerate departures, including insisting on offshore application for visas, including for family and parents. Bridging visas would not be available to those waiting on a visa decision.

Making sure the administrative tribunal follows government policy prescriptions is also important but may require legislative change. Allowing a convicted failed asylum-seeker to stay in the country because of "visa stress" should simply not be permitted.

For all its talk, the Albanese government has done very little to fix the mess that the immigration system has become. The reluctance to offend the left of the party or take on the vested interests, including universities, parts of the business community, the states and some ethnic groups, has led to an increasingly shambolic system.

It's a long way back to an orderly and controlled migration program that serves the national interest. Implementing the changes outlined above would be a good start.

GLENN KOLOMEITZ

Wong's doctrine: One rule for Israel, another for ADF

International law has long recognised that civilian casualties are a reality of war. The law also recognises that not every civilian death amid armed conflict is a war crime.

Even in relatively permissive combat situations, tragic mistakes in the execution of operational plans happen, let alone in Gaza – the most complex battlespace in the world.

In recent weeks Israel announced the closure of its investigation into the deaths of civilian aid workers in the Gaza Strip in April 2024. As a result of that two-year investigation, a decision was made not to start criminal proceedings. It is far from unusual for a democracy to determine that a criminal case is not sustainable.

Australia elected not to even investigate our senior commanders for the alleged crimes of subordinates in Afghanistan on the basis of a flawed application of the

law and a lack of understanding of command structures in that theatre.

Not being one to let those pesky facts and laws get in the way of some good old-fashioned Israel bashing, Foreign Minister Penny Wong described her outrage at the decision which, in her words, fell far short of the accountability we expected.

Israel conducts a robust fact finding, takes rapid administrative action against Israel Defence Forces officers, investigates and finds that a criminal threshold has not been met. Australia gives what a government-appointed oversight panel described as a "blanket exemption" to our generals from even being investigated; is that the sort of accountability we expect?

In recent years a series of Australian Defence Force administrative inquiries into suspected civilian casualty incidents in Afghanistan were found to be so

lacking in rigour and investigative scepticism that the validity of the findings exculpating ADF personnel has been seriously questioned. Not a word from Wong.

Perhaps she should reflect on the adage about people in glass houses throwing stones.

Following the tragic incident in Gaza in 2024, Wong dispatched a retired senior ADF officer to Israel to report back on the sufficiency, appropriateness and transparency of Israel's investigation. The report identified significant failures in IDF procedures – a point Israel acknowledged and accepted full responsibility for at the outset – but concluded the strike on the aid workers was not knowingly or deliberately directed at them.

The report was largely complimentary of the IDF investigative processes and concluded the post-incident investigation system was similar to the Australian system, and the IDF independent fact-finding mechanism was very similar to the ADF administrative inquiry process.

While the report details the extent to which the IDF inquiry mechanism is separate from and independent of the military chain of command, it does not then mention that ADF administrative inquiry processes, far from being independent of the chain of command, are a function of command. The report describes the statu-

tory independence of the IDF Military Advocate General and all IDF lawyers but does not mention that ADF lawyers do not enjoy such statutory independence. A deployed ADF lawyer is a staff officer reporting to the operational chain of command, who in turn receives performance reports from the same commander.

The report identifies legal advice provided to commanders by IDF lawyers is binding on the commanders. ADF legal advice has no such binding effect. IDF targeting processes have several layers of binding independent legal advice. In contrast, it is normal for a unit to deploy with only one ADF lawyer.

The Israeli military justice system is overseen by the Attorney-General and Supreme Court, and the court is not shy in criticising and sanctioning the IDF and its leadership. Australia's military justice system has been subject of inquiries and reviews over decades and a recurring theme has been the excessive exertion of command influence during investigative processes. A Defence Force Magistrate once described the conduct of a senior officer in the course of disciplinary proceedings as an "impermissible and invalidating command influence". Exactly which variety of accountability does Wong expect to see?

The Foreign Minister was not happy with the report she received

from her envoy to Israel. She immediately put out a press release relying on the report of the retired senior ADF officer to condemn Israel but deceptively omitted critical details and misrepresented the content of the report.

After she became aware of Israel's decision not to pursue criminal proceedings, Wong again put out a press release in which she again fell back on the report from the retired officer and was again deceptive by omission and misrepresentation of what the report actually concluded.

Notably absent from Wong's tirade is any mention of the fact that Hamas directly and intentionally endangers civilians by embedding itself in civilian infrastructure and in the operations of non-government organisations.

While in Israel, in the course of researching a book on IDF targeting, I was given access to IDF targeting processes and received briefings from lawyers from the IDF and the Ministry of Foreign Affairs. That itself evidences a level of transparency seldom seen in Australian military and departmental circles. The facts matter, the law matters.

Glenn Kolomeitz is an international law consultant and defence analyst. His forthcoming book is *Ground Truth: Israeli Targeting in a Complex Battlespace*.

MAX MEIZLISH

Trump's new Iran sanctions put China on notice

For years Washington has imposed sanctions on Iran and its regime's supporters while largely sparing the foreign banks that helped Tehran evade those sanctions. The Trump administration wants to change that.

Days after Treasury Secretary Scott Bessent announced an "economic D-Day" campaign against Iran's enablers, the department announced on August 28 it would cut off five United Arab Emirates-based branches of Egypt's state-owned Banque Misr from access to the US financial system.

Treasury can complete the measure after a 30-day public comment period. This gives the bank, along with regulators in Egypt and the UAE, a window to co-ordinate with Washington and address misconduct. If the bank credibly cleans house, Treasury can reconsider the proposed measure.

According to the US Treasury's Financial Crimes Enforcement Network, or FinCEN, which monitors and reports on suspicious financial activity, the targeted branches have processed about \$US1.8bn for 103 suspected Iranian shadow banking fronts since 2024, including companies tied to Iran's Defence Ministry and Islamic Revolutionary Guard Corps.

The regime in Iran leverages a network that includes thousands of opaque shell companies and trading houses in places such as the UAE and Hong Kong to evade sanctions by moving billions in oil and petrochemical proceeds, ultimately gaining access to the US financial system.

By acting against foreign banks that service this network, the Trump administration is applying a level of pressure rarely seen across administrations. The President's critics will argue the announcement falls short of Bessent's promise of major sanctions action but they are mistaken. Threatening to cut Banque Misr UAE's access to the US financial system is a sanction in every meaningful sense.

By leaving a window open for reform, the Trump administration seeks to change behaviour – not merely punish it. But Banque Misr UAE must only be the start. Hong Kong is another hub that FinCEN identifies as harbouring Iran's shadow-banking fronts. Treasury should consider similar actions against one or more Hong Kong banks. Treasury should also apply full blocking sanctions to China's Bank of Kunlun by adding it to the Specially Designated Nationals List.

Bank of Kunlun is controlled by China National Petroleum Corp, one of China's largest state-owned enterprises. Washington cut the bank off from US correspondent banking in 2012 but the bank has continued facilitating Iranian business. That's because the bank did little business in dollars, making its US financial cut-off largely symbolic, while Treasury's limited action never forced CNPC to choose between Kunlun and other interests.

A full blocking designation would force CNPC to decide whether keeping the bank alive is worth exposing its far larger commercial interests to the risks that come with owning a financial institution subject to sanctions.

The action taken against Banque Misr UAE draws on Section 311 of the Patriot Act. Section 311 measures can target not only individual financial institutions but entire classes of transactions. FinCEN could use that authority to require heightened scrutiny of oil and petrochemical-related transactions exhibiting the hallmarks it already associates with Iranian sanctions evasion: large round-dollar payments, rapid movement of funds, unclear commercial purposes, unusual use of exchange houses, and discrepancies between payments and underlying trade records.

That scrutiny should extend to the Iranian oil that is frequently rebranded as Malaysian and sold to Chinese buyers. China's reported oil imports from Malaysia vastly exceed what Malaysia itself reports exporting. That discrepancy ought to be a warning for banks involved, especially since China purchases roughly 90 per cent of Iran's exported oil. More pressure from Treasury could help keep them from ignoring it.

Treasury's latest action suggests the US may finally be moving beyond chasing Iranian shell companies toward threatening the foreign financial infrastructure that keeps them alive. That would be a meaningful break with the approach of past administrations. But for it to be a success, the campaign needs to be sustained – and it needs to reach China.

Max Meizlish is a research fellow at the Foundation for Defence of Democracies. He has worked in the US Treasury's Office of Foreign Assets Control. This article was first published in *The Wall Street Journal*.

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EDITORIALS

Voters deserve to know when influencers are being paid to sell candidates

Influencers aren’t just hawking lip gloss, vacation ideas and exercise tips these days. Increasingly, they’re being paid to shape how voters view elections.

If podcasts were the battleground for the 2024 presidential election, the battlefield today is Instagram and TikTok, where influencers are increasingly peddling not only talking points and messages but “exclusive” interviews and puff pieces — for a price.

“One more way to buy influence in our politics? Pay online influencers with followings to tout you or your issue, in messages that do not disclose that money has changed hands,” is how longtime Democratic politico David Axelrod put it in an Aug. 29 post on X.

Consider a video from the account @becky.in.chicago, which features Mayor Brandon Johnson in a one-on-one interview with Rebecca Lehmann, a self-described “cool auntie in Chicago helping you explore the city.” This video, part of a series of conversations with the mayor, is mixed in among neighborhood tours of Pilsen and Andersonville, among others, and features Johnson talking about his plans to invest in communities like Englewood.

It could pop up in feeds unbidden, courtesy of paid advertising spends or simply Instagram’s unknowable algorithm. Or maybe you just follow Becky (more than 30,000 people do).

What stood out to us about the video is that it was clearly marked as a paid partnership with Bran-



Democratic gubernatorial candidate Tom Steyer takes a selfie with a supporter during his election night watch party on June 2 in San Francisco. **MINH CONNORS/GETTY**

don Johnson for Chicago.

That’s important, especially since it is now widely assumed that Johnson will announce his re-election campaign shortly after Labor Day. Viewers should understand the nature of the content they’re viewing.

“Content creation is skilled work, after all,” Lehmann told the Tribune, by way of justification for the cash. “I’ve been transparent about how I approached it as a creator, and handled it with care knowing that it would generate a discussion. Beyond that, I’m going to let the content speak for itself.”

Not all influencers posting on behalf of candidates are so forthcoming.

To be clear, we see nothing wrong with influencers being paid to stump for a politician. But they should be subject to the same truth-in-advertising rules as all other political ads, such as the ones you watch on TV.

Paid content dressed up as a voter’s sincerely held beliefs is deceptive, manipulative and confusing.

The lack of transparency frankly should make everyone on social media skeptical about the

authenticity of the messages with which they’re being blasted in their feeds.

Josh Greene, an influencer known as “Josh the Progressive” on social media, is well-known for his takes on candidates and issues and has amassed a following of some 458,000 Instagram users. He’s interviewed Sen. Bernie Sanders and New York City Mayor Zohran Mamdani. But as The New York Times discovered recently, he’s receiving money from some politicians to post certain content. For example, former California gubernatorial candidate Tom Steyer paid Greene over \$21,000, according to the Times.

Greene also featured an interview with Johnson in May after the mayor announced plans to visit Pope Leo at the Vatican.

As the Times reported, Greene does take payment from campaigns. His video with Johnson was not marked as a paid partnership, so we don’t know if any cash changed hands. We reached out to the Johnson campaign for clarification and didn’t hear back by our deadline.

It’s hardly just our mayor getting in on this trend. Smart politicians on both sides have recognized the need to gain influence on social media platforms, and many candidates themselves post short-form content they hope will garner attention. It’s always helpful when the message comes from someone else, too.

“Any campaign worth their salt will be trying to figure out: In the same way you pay for airtime, you pay for screen time,” Johnson

campaign director Christian Perry told the Tribune last month. “This is not anything nefarious, new or unsavory. This is where people are getting their news and information.”

And their ads.

This is quite the gold rush for influencers, who often understand better than outsiders how to capture eyeballs and offer users content that pops.

In politics, you always follow the money. When it comes to influencers and whether their content is native or bought and paid for, that’s not always possible.

When a political ad runs in a newspaper or on TV, there are legal requirements that viewers be informed who paid for it. The evolution of social media has created a much less regulated landscape when it comes to politicking.

Campaigns have to report their payment, yes, but there are not clear requirements that the influencers themselves have to disclose the paid nature of their partnership with a campaign. And that’s a problem that needs fixing fast.

The Federal Election Commission should update our regulatory framework to address the creator economy. Requiring “paid for by” on content that has been, well, “paid for” by a political campaign is essential.

Voters have to sift through enough noise without having to parse whether a video comes with a side of political influence.

In the meantime, be extremely skeptical of the seemingly organic content you see online. You never know who paid for your eyes.

Walmart is cutting prices to share tariff refunds

Did you get the benefit where you shop?

Following the Supreme Court’s decision early this year that President Donald Trump’s tariff regime was unconstitutional, many corporations have seen substantial windfalls in the form of federal refunds for the tariffs they paid.

That’s put some of them, particularly retailers that passed much of that tariff bill along to consumers, in the ticklish position of deciding whether, and if so how, to help their customers share in the good fortune.

So it’s heartening to see that Walmart, the nation’s second-largest retailer after Amazon, has cut prices on about 11,000 products, using a chunk of the \$2.9 billion in tariff refunds paid to the Arkansas-based giant. That included savings on ground beef, the cost of which has soared and made it a potent symbol of persistent inflation in the U.S.

“We’re investing heavily in price because customers need us

to and because we believe it delivers market share gains over time,” Walmart CEO John Furner said on the company’s Aug. 20 quarterly earnings call.

That is a very refreshing message to hear from a titan of corporate America.

Offering consumers value while being fair is also what Walmart thinks will keep those customers coming back after the tariff refunds dry up. We think they’re right.

Other companies are doing the same. As of early August, the federal government had refunded about \$100 billion in tariffs imposed after Trump’s “liberation day” announcement in April 2025, with more to come.

Beauty products company E.l.f. Beauty cut prices across a broad swath of its offerings using \$50 million in tariff refunds, The Wall Street Journal reported. Another example the business paper cited: Tractor Supply, a large retailer in exurban and rural communities, is offering more special promotions and cutting prices on

specific products like high-end pet food with its tariff reimbursement.

These moves counter the sour narrative that arose soon after the Supreme Court ruling. Tariffs were paid to the government by importers — that is, companies — not by consumers. So the refunds would go to the companies. Yet in most cases consumers bore the brunt of the levies in the form of higher prices charged by the affected companies. Before companies even had seen a dime, there were critics fuming that firms simply would pocket the windfall, leaving consumers holding the bag for these unauthorized charges.

The actions by Walmart et al also confirm — despite Trump’s repeated assertions that his tariffs don’t raise prices and are paid for by foreign businesses — what economists told us repeatedly during the early debates following liberation day: Tariffs in effect are taxes paid by consumers. Walmart wouldn’t be paying for reduced prices with tariff refunds if it

hadn’t passed much of the costs of those tariffs to consumers in the first place.

Recall May 2025 when Doug McMillon, then Walmart’s CEO, told shareholders in no uncertain terms that Trump’s tariffs would mean higher prices on Walmart products. “We aren’t able to absorb all the pressure given the reality of narrow retail margins,” McMillon said.

Trump angrily responded in a Truth Social post that Walmart should “EAT THE TARIFFS.”

Needless to say, Walmart didn’t heed Trump’s demand, nor could it have done so given its fiduciary duty to shareholders.

Of course, not all retailers are responding alike. Home Depot, another major retailer that imports many of its products, received \$730 million in tariff refunds in late June. But it plans to use that windfall to offset higher fuel and other costs that “we did not have as part of our outlook for 2026,” Home Depot Executive Vice President Billy Bastek said Aug. 18 on the company’s earnings

call. Of that \$730 million rebated for the tariffs, \$685 million was on goods already sold to consumers; the rest was on products in inventory.

In other words, consumers likely absorbed much of the cost of Home Depot’s tariffs.

You know who else didn’t have these far steeper gas prices in their “outlook for 2026”? Consumers.

But Joe and Jane Commuter won’t be getting any Home Depot-like relief to ease their price at the pump.

In a market economy, of course, it’s the prerogative of Home Depot or other any other retailer to weigh the health of the bottom line versus growing market share. And it’s up to consumers to determine whether those actions will influence their future buying behavior.

The dramatic effect of Trump’s tariffs, both their imposition and their reversal, has added an element of fairness to these routine business decisions that could reverberate for well-known brands for some time to come.

ON THIS DAY 41 YEARS AGO MEET THE EDITORIAL BOARD

On a page intentionally separate from the reporting of news and objective analysis, the Tribune speaks its mind every day about all kinds of issues. The goal is to offer readers perspectives that aren’t always evident from a news story itself, in the hope that they’ll find the newspaper’s view helpful in reaching their own conclusions.

How do editorials come to be? Four times each week, the writers and editors of these pages gather to debate which issues merit editorials—and what the Tribune ought to say about them. The paper’s core principles—equality, freedom of expression, individual responsibility, free markets and a limited role for government in the lives of its citizens—suffuse virtually every discussion.

But on specific issues, the editorial board is almost never unanimous. That’s because its members blanket the political spectrum, from liberal to conser-

vative, from dove to hawk, from death penalty opponent to advocate, and so forth.

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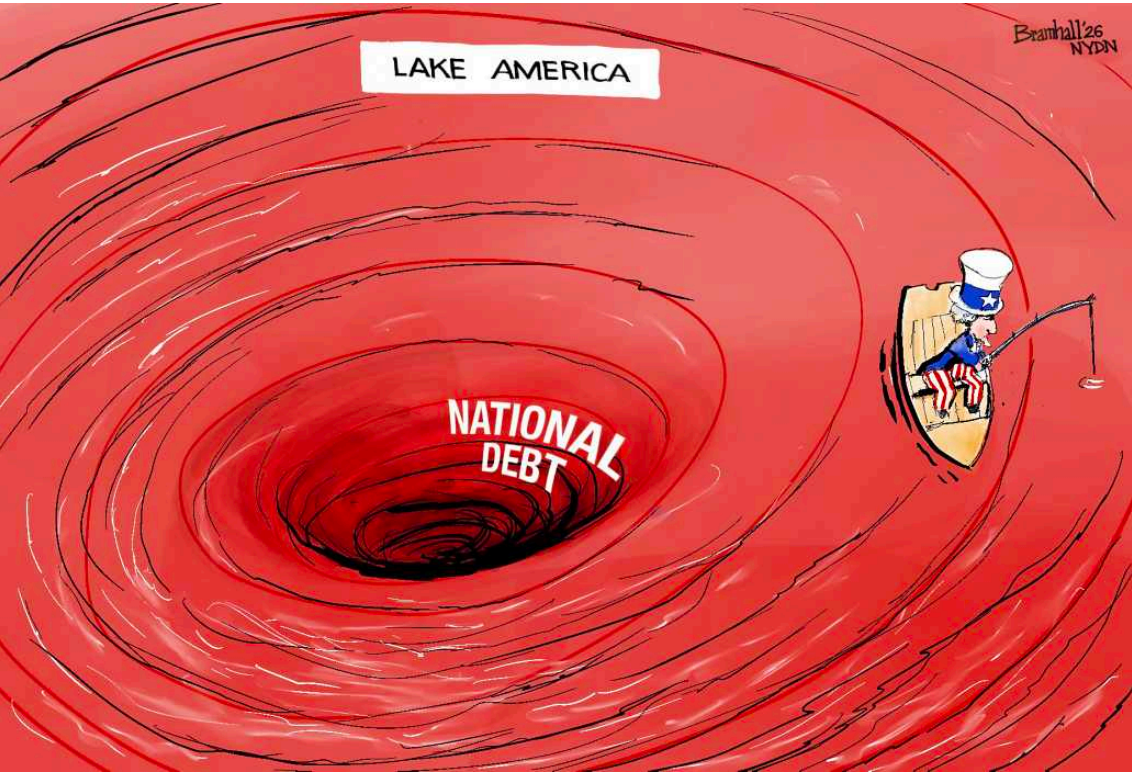
Such disagreements aren’t settled by a majority vote of the editorial board. The final call goes to the editor of the pages. These can be hard-fought debates. What prevents the occasional fistfight is a shared respect for the board’s mission of speaking for the Tribune—and the fact that, just as in a marriage, the personal relationship you fracture today makes it mighty tough to work together tomorrow.

...

Why don’t editorials carry bylines, as do other stories throughout the newspaper? In a way they do. One byline appears in big Gothic type at the top left corner of every editorial page. This is where the Tribune, far more than the individuals on its editorial board, speaks its mind.

Tribune editorial board,
Sept. 1, 1985

EDITORIAL CARTOON



BILL BRAMHALL

OPINION



Country and western superstar singer Dolly Parton entertains the audience at the Magna Science And Adventure Park on Dec. 5, 2007, in Rotherham, South Yorkshire, England. Dolly Parton honored the former steelworks town to be the first European location to participate in her "Imagination Library" literacy program. **CHRISTOPHER FURLONG/GETTY**

Dolly Parton’s Imagination Library is more important than ever

By **Jerald McNair**
SPECIAL TO THE TRIBUNE

How do we celebrate the life of Dolly Parton? She was such an iconic figure who transcended time, race, social class and gender. Her music will live on, influencing generations to come. Songs such as “Coat of Many Colors,” “Jolene,” “I Will Always Love You” and “Here You Come Again” have changed lives for the better and continue to be heard worldwide.

As a fan and an educator for over 30 years, I believe what separates Parton from so many of her contemporaries is the impact she has had on education around the world. In 1995, Parton founded the Imagination Library in honor of her dad who could not read or write. The early childhood literacy program has distributed more than 300 million books to children up to age 5 around the world. By the time the children become too old to participate, they will have received 60 books. Consider the

benefits of that many books. The U.S., Ireland, Australia, the United Kingdom and Canada participate in the program.

Childhood literacy affects school dropout and incarceration rates, as well as the quality of life for adults. Data from the World Literacy Foundation reveals that children who drop out of school are at a much higher risk of incarceration; more than 70% of incarcerated adults cannot read above a fourth grade level. By the third grade, a child who cannot read proficiently is four times more likely to drop out of high school. And more than 85% of juveniles in the court system are functionally low-literate.

A consistent decline in students’ reading scores across the country continues to alarm and baffle policymakers, educators and other stakeholders. Every two years, the National Assessment of Educational Progress (NAEP), known as the Nation’s Report Card, tests students in grades four, eight and

12 in subjects such as reading and math. Data from the National Assessment Governing Board shows that since 2015, reading scores have declined in grades four and eight. For example, in 2024, average reading scores published by the Nation’s Report Card declined by two points for fourth and eighth grade students compared with 2022. For 12th graders in 2024, reading scores dropped to 283 from 285 in 2019.

Recent data shows some improvements in 9-year-olds, who are typically in the fourth grade. Compared with 2022, the 2025 average reading score for 9-year-old students was four points higher, with lower-performing students making gains. However, reading data can be quite volatile, particularly for younger students. Gains can be seen one year, only to be followed by a precipitous decline the next year.

It is this reality that makes Parton’s Imagination Library program so important. She had a

profound understanding of how reading influences the lives of children, not just in their developmental years but also throughout life. We see far too many youths engaging in misconduct from fighting to bullying or simply exhibiting an intolerance for the beliefs and ideas of others. When our youths can read proficiently, they think more critically, synthesize information, better understand the views of others and express their disagreements using words rather than with violence. Reading exposes them to experiences and enriches their lives.

It is the aim and the desire of schools to improve the lives of their students. How do we improve the reading scores of youths to help enrich their lives? Experts can identify the problem but have a harder time coming up with solutions. The reasons for poor reading scores are wide-ranging. They include the pandemic shutdowns, children’s preoccupation with technology

such as video games and phones, chronic absenteeism rates that have not dropped to pre-pandemic levels for most school districts around the country, and fewer youths simply reading for pleasure.

Imagination Library cuts through the rhetoric and places books in the hands of children, in essence changing their lives for decades to come. The world will miss Parton. Her legacy lives on in the hearts and minds of us all. Let’s continue to celebrate her by elevating Imagination Library even more, in every community.

William Shakespeare wrote: “Be not afraid of greatness: Some are born great, some achieve greatness, and some have greatness thrust upon them.” Parton’s life embodied all three.

Jerald McNair is a school administrator in South Holland School District 151. McNair has a doctorate degree in education and a graduate degree in public policy.

How do I have ‘the AI talk’ in my classroom?

By **Adam Patric Miller**
SPECIAL TO THE TRIBUNE

I’ve been back to school for a week, and I still haven’t had “the AI talk.” To me, it’s almost as bad as the sex talk I avoided with my kids years ago. What should a teacher say about artificial intelligence? I’ve followed protocol and pasted pages of our English department policy into my syllabus. Normally, I would read that aloud with students on our first day, but this year, I didn’t. This year, I’m taking extra time alone to craft a few thoughts.

Our English department policy states, “AI is evolving faster than our capacity to respond to it in well-informed, intellectual, academically useful ways. As a result, we don’t want to engage in haste simply because the rest of the world seems to embrace AI. Instead, we want to be intentional with our students about AI’s place in our discipline.” Teachers should be intentional, but the policy admits the evolution of AI is faster than we can figure out how to respond.

What I realized last year: Most papers turned in were smudged with AI’s digital fingerprints.

I’ve used AI to discover AI in my students’ essays. Fight fire with fire. But then there’s the question of punishment. In our school, if we detect AI, that’s a failing grade, an email to an administrator, a phone call home to parents and a tense conversation with your student who will swear they didn’t use AI. Your time to plan lessons or decompress is eaten away. Also, no AI detector is flawless. The last thing a teacher wants to do is harm a student’s record using a flawed system. Teachers know we’re flawed enough



without technology helping us to besmirch the students we’re trying to nurture.

I often share with students my struggles as a writer. Writing is complicated. It can be so difficult to find your voice, and learning how to leverage words to persuade or protest may take a lifetime. Unlike music, math and chess, there are few writing prodigies. You go through trial and error, hopefully with the help of a fellow sufferer who can show you how to improve. AI makes people who don’t know how to write think they are prodigies: Look, flawless sentences! But to someone who loves the sound and sense of words, AI sentences read like smooth cardboard.

Last year, a parent said, “But I use AI to write all my emails.” It’s an excellent tool and saves time. A former student who works as a writing tutor in college said he doesn’t report all the AI he sees because the students can be kicked out. He tells them, “Don’t do it. It’s not worth it.” When I ask my former student if he uses it, he says he does, but only to organize his thinking. It’s an organizational godsend. My youngest son who works in finance said he uses AI every day to code. AI is a money-maker.

Recently, I needed to produce a two-paragraph book synopsis for a literary agent. It’s a heinous task because you’re reducing 98,000 hard-earned words to two

paragraphs. So I fed my chapter outline into an AI machine, and presto! No sweat, no anxiety, no fear over leaving plot elements out or putting everything in its right place. Yet, I’m happy to report, AI fell short. It didn’t know how to create empty space. Every nook and cranny of those paragraphs was filled like a synopsis was a quadratic equation to be solved.

Great writing is what is not there. What is left out. Where meaning is felt. AI only knows what is there. It’s the difference between talk of love and the act of love.

It’s safe to say that high school English teachers are worn down by the ubiquity of AI. Universities are changing their admissions policies, dropping supplement-

tal essays because what they’re getting is Teflon-smooth. This puts more emphasis on the personal statement, and even last year, I sat with a parent and talked about how his son’s essay was seamless but lacked life. The dad said his son wouldn’t change anything. We both knew AI was in the room, getting paid, destroying our planet. If parents won’t fight against AI, teachers can’t do much.

When I have “the AI talk,” I’ll say I don’t like how AI is on my computer without my consent. I’ll say that writing is like going to the gym and lifting weights for your brain, and if a robot lifts the weights for you, your muscles will atrophy, “and your brains will flow out your ears like tapioca pudding.”

The students will ask, “What is tapioca pudding?” I tell them, “Look it up on your new school-issued iPads,” which are supposed to prevent the use of AI but won’t.

And I’ll think to myself because I’m not allowed to say it at school: Students should know how AI is used by Israel to kill people in Palestine with programs such as Lavender that analyze phone data, social media and video as targeting info for missiles. Its companion AI program “Where’s Daddy?” tracks people identified by Lavender so when they arrive home, they can be bombed with their families. That’s an AI talk every American family should have.

Even if I don’t say it aloud in the classroom, like with great teaching, maybe students will feel it. I don’t want to fail them.

Adam Patric Miller has taught high school for 25 years in three states and currently teaches in St. Louis. He is the author of the book “A Greater Monster.”

ANTONIO PEREZ/CHICAGO TRIBUNE

OPINION

At 6 months, there is no clear winner in Iran war



Daniel DePetris

The war in Iran, the “little excursion” that was supposed to be over in four to six weeks, passed its six-month mark on Friday. And notwithstanding President Donald Trump’s premature declarations of victory, threats to pummel the Iranians into submission and his repeated proclamations that the United States is winning the conflict, the actual result thus far is a blurry picture. The endgame is likely to be far less impressive than the pro-democratic Iranian revolution he called for on the opening day of the war.

The conflict has taken on a predictable pattern: Tit-for-tat violence is replaced by diplomacy, which then collapses into renewed shooting and a subsequent series of unilateral ceasefires that are eventually challenged by more barrages. In its quest to get the Strait of Hormuz open, the Trump administration has spent months throwing spaghetti at the wall to see what would stick.

When consecutive weeks of U.S. airstrikes against Iranian missile batteries, small boats and drone manufacturing facilities failed to compel Tehran to reopen the waterway, the White House switched to a naval embargo of Iranian ports in the hope the economic pain would reach an intolerable level.

When that strategy fell short of the mark, the administration coupled the embargo with what Treasury Secretary Scott Bessent labeled “Operation Economic Outcast,” yet another economic pressure campaign designed to penalize any individual, company or country that trades with Iran. The aim: Strangle the Iranian economy and push the regime to get back to the negotiating table on American terms.

The Iranians, however, haven’t demonstrated much propensity to toe the line. Instead, every U.S. measure has reaffirmed a prevailing belief within the regime that Washington is merely interested in its downfall. Trump, who in the past upended diplomacy with Iran twice in favor of bombing, is viewed across the Iranian political establishment as the devil incarnate: somebody who believes blunt force trauma will get the



Children play at a beach as commercial vessels are anchored in the Strait of Hormuz off Bandar Abbas, Iran, on Wednesday.

AMIR BIAZAR/IRANIAN STUDENTS’ NEWS AGENCY

other side to surrender its vital interests.

If the Iranians were once willing to consider a deal to end the war and bring the Strait of Hormuz back to normal, they’re now wondering whether any deal they sign with Trump is worth the paper it’s written on.

Trump’s war with Iran was supposed to result in a clear-cut American victory, according to what the administration sold us at the outset. We were told that Iran would no longer be able to threaten the Middle East because its military capacity would be shredded. Tehran’s nuclear program, a problem every U.S. president since Bill Clinton has had to contend with, was going to be abolished for good. The regime itself would even fall apart as the Iranian people took matters into their own hands.

Of course, six months later, none of this has happened. Yes, Iran’s military capability has taken a beating — thousands upon thousands of U.S. and Israeli airstrikes will do that — but the regime has still surprised the U.S. intelli-

gence community with how fast it rebuilt some of its military-industrial complex. Iran’s stockpile of highly enriched uranium is thought to be buried somewhere in one of its damaged nuclear facilities, yet the lack of international inspectors on the ground means that nobody can be 100% sure about its exact location or whether Iran has managed to retain some of the centrifuges required to churn out more.

As far as an overthrow of the mullahs goes, well, that hasn’t worked out. If Trump thought killing Iran’s senior leadership during the war’s first weeks would get the regime to collapse like a house of cards, then it severely misjudged the nature of its enemy as well as the power of nationalism in the face of foreign aggression. Whatever moderates were left in the Iranian system have been marginalized and rendered impotent.

The demise of Supreme Leader Ayatollah Ali Khamenei, national security chief Ali Larijani and Mohammad Pakpour, the commander of the Revolution-

ary Guard, among many others, produced a situation whereby hard-liners grabbed ever-greater control of the state.

The new supreme leader, Mojtaba Khamenei, is more interested in acquiring a nuclear weapon than his father was. The regime as a whole is now governed by security men whose formidable experience was the nearly eight-year war with Saddam Hussein’s Iraq in the 1980s. Compromise is now a dirty word, and Iran’s price for ending the conflict with the Americans has gone up.

Despite an increasingly inept Iranian economy, rising inflation and food prices going through the roof, the powers that be are no more interested in surrender today than they were on the war’s first day.

After so much death and destruction and so little movement one way or the other, it’s hard to see any clear winners here. Indeed, the only thing the war has achieved is pushing up gas prices for Americans who are already tired of paying more for pretty much everything. Every problem

the Trump administration wanted to solve is still a problem. And in the process of embarking on a war that didn’t need to be fought, the United States has created new ones, first and foremost turning one of the world’s most critical shipping arteries for energy supplies into a front line.

The United States and Iran are in a long staring contest. For the Iranians, the objective is simple: Survive the American onslaught and come out the other side intact. Iran may be the weaker party militarily, but it at least knows what it wants.

The same sense of clarity can’t be found on the other side. At this point, with so few wins and no good options, Trump’s goal should center on extricating the country from this conflict. Whether his ego will allow him to exit Iran is the question that will determine whether the United States puts out a fire of its own making or throws more gasoline on it.

Daniel DePetris is a fellow at Defense Priorities and a foreign affairs columnist for the Tribune.

Voice of the People

Praise for Secretary Duffy

Like the Tribune Editorial Board, I welcome Transportation Secretary Sean Duffy’s announcement of more funding for Amtrak across the Midwest (“Transportation secretary puts his federal money in right place — popular, practical Midwestern trains,” Aug. 20). I live in Springfield, am almost totally blind and do not drive, and thus, I am a frequent user of the Lincoln Service Amtrak route to and from Chicago.

I hope the Illinois congressional delegation, the governor of Illinois, the legislature and others will continue to work for ongoing support of Amtrak across Illinois and the Midwest. This needs to include ways to enhance the very popular Lincoln Service route between St. Louis and Chicago. This route contains Illinois’ second busiest Amtrak station in Bloomington-Normal. Furthermore, we must work for transportation links to existing Amtrak routes such as the Lincoln Service to other locations.

Let’s be real. Trains do not and cannot go everywhere people may want or need to travel. As an example, in order to travel from Springfield to Rockford, I have to take a train all the way to Chicago, then travel northwest to Rockford by bus, which takes about six and a half to seven hours for a trip that would take three to four hours by car. When transportation alternatives can approach the time it takes by automobile, more people will use them.

Also at present, even with the number of daily round trips, there’s a severe midday gap in service for central Illinois on the Lincoln Service route. As the editorial board accurately states, if you provide train service, people will use it.

Duffy is to be commended for his commitment to Amtrak across the Midwest. Let’s see this commitment extended to all Amtrak routes and to things like bus connections, which will make Amtrak a practical option for everyone regardless where they need and want to travel.

— Ray Campbell, Springfield



Transportation Secretary Sean Duffy unveils Amtrak’s Freedom 250 Acela train at Union Station on May 7 in Washington. HEATHER DIEHL/GETTY

Why can’t we end the war?

It has long been acknowledged that the United States has the greatest military force in the world. Why then can’t the United States use this superior military force to successfully end the war with Iran? Is it a lack of will, of leadership?

Whatever it is, it sure is a head-scratcher.

— Richard Dreger, Batavia

How we are manipulated

I hope most people have had enough with President Donald Trump and his administration’s invented threats. We are repeatedly told that someone else — communists, liberal terrorists and blood-thirsty immigrants — is out to ruin the American way of life and make our lives miserable. Personally, I’ve never met anyone fitting that description. These threats didn’t seem to exist 15 years ago. Rather, they have been dredged up to manipulate us to go along with the administration’s policies and acts.

These include massive corruption, long-term wars, targeting of political opponents and power-mad, joyful cruelty. Fortunately, more and more people seem to be sick of this harmful nonsense.

— Marty Thompson, Barrington

What awaits deported Haitians

In Kenscoff, Haiti, a commu-

nity the size of Oak Park, about 50 people were recently murdered and an equivalent number were kidnapped.

I have visited there twice and remember a beautiful mountainous community served by a winding road from the capital city. Displayed on the roadside were numerous paintings for sale by skilled Haitian artists on unframed canvases. Careening vehicles shared the sidewalk-less road with seemingly unfazed pedestrians. On Sundays, the pedestrians included older men in suits walking to church in the sweltering sun.

The massacre in Kenscoff is emblematic of the increased violence in the country. However, President Donald Trump’s administration has canceled Temporary Protected Status (TPS) for Haitian immigrants based on the fiction that the situation in Haiti has improved. This is not the case: When TPS was initiated, Haiti was less dangerous. When I visited, I felt comfortable enough to walk the streets of the capital alone. Now, the U.S. State Department rates Haiti as one of the most dangerous countries on earth and advises Americans not to travel there.

The suspension of TPS and the deportations of Haitian immigrants are cruel. Undoubt-

edly, some who have been or will be deported to Haiti will be murdered; others will be raped; some will be kidnapped.

Making things even worse is that Trump’s policy is based on lies: that undocumented immigrants are dangerous (they actually commit crimes at a rate lower than native-born Americans), that they do not value freedom as much as native-born Americans do and that they are a drag on our economy.

— Richard Hudson, Chicago

Mnemonic device revealing

As schoolchildren, we memorized the names of the Great Lakes using the mnemonic device HOMES: Huron, Ontario, Michigan, Erie and Superior. It looks like we will now have to use SHAME: Superior, Huron, America, Michigan and Erie. That pretty much sums up my feelings for the current administration in Washington.

It will always be Lake Ontario to me (and the Gulf of Mexico).

Oh, Canada, I’m so sorry.

— Arlene R. Jarzab, Hinsdale

Investigation of Dr. Fauci

The congressional investigation into Dr. Anthony Fauci is certainly appropriate, although one question why it took so long to begin. After all, the death rate from COVID-19 — number of deaths per 100,000 residents — was higher in the United States than other high-income countries and Fauci was in charge, at least ostensibly. Some nations did amazingly well: Australia’s death rate was about one-twentieth of ours and Japan’s one-fiftieth.

A closer match is Canada, which, despite similar geography and demographics, managed a death rate less than half of ours. How did it achieve such good results? Can we learn from them? Unfortunately, the investigation is far too narrow in scope. The cause of our disproportionate suffering

was almost certainly multifactorial, with many important questions still unanswered.

The airline industry gives us a superb example of how to minimize future disasters by thoroughly investigating the causes when they occur. COVID-19 deserves a similar approach. Unfortunately, the investigation of Fauci smells a lot more like an effort to find a scapegoat than a search for answers. The first matter to settle is whether our performance was so awful in the first place. A large number of Americans believe that deaths from COVID-19 were greatly exaggerated. This deserves further scrutiny if only to help put us all on the same page.

— Craig Zabel, Sugar Grove

Parton’s nurturing of reading

We hear the word “legacy” a lot lately. Currently in the planning stage is a monstrous gilded triumphal arch in Washington, D.C., as a legacy reminder of a wealthy and powerful narcissistic egomaniac.

Dolly Parton was equally wealthy and powerful. What she leaves behind as a legacy is a generation of children who received free books, through Imagination Library, nurturing literacy and knowledge. Maybe a future president will have benefited from Parton’s Imagination Library.

Vanity architecture nurtures no one. Books open the world to all.

— Susan Haley, Oak Brook

Note to readers

Construction on Chicago streets and bridges this summer has created headaches for many drivers. We’d like to hear from you about your frustrations with the delays and the city’s management of the closures and detours. Send a letter of no more than 400 words by Wednesday, Sept. 2 to letters@chicagotribune.com. Be sure to include your full name and city/town.

For online-exclusive letters, go to www.chicagotribune.com/letters. Email your letter submissions, 400 words or less, to letters@chicagotribune.com. Include your full name, address and phone number.

OPINION

Justice for the ‘Killer Mom’



MAIN STREET
By William McGurn

Pity the jurors in the Lindsay Clancy case—the “Accused Killer Mom” trial. Unlike a standard murder trial, they don’t have to decide whether the 36-year-old Massachusetts mom killed her three children: 5-year-old Cora, 3-year-old Dawson and 8-month-old Callan. She did kill them, shortly before attempting suicide by jumping from a second-story window and suffering injuries that left her paralyzed from the waist down.

The question for the jury is more difficult. Is Ms. Clancy criminally liable for killing her three children, as the prosecution maintains? Or did she act in the throes of postpartum psychosis, relieving her of criminal responsibility, as her defense claims?

In his closing statement, defense attorney Kevin Reddington presented jurors with two photos. One showed the Clancy family looking happy and the other showed Ms. Clancy in the hospital. “How does this turn into this?” he asked. “How? Because of the damn medicine and the lousy medical care that she got.”

The prosecution pointed to what the jury was there to decide. “The issue is whether at the time she killed Cora, Daw-

son and Callan, she knew the difference between right and wrong, and whether she could conform her behavior to the requirements of the law.”

The jury is out. Once it returns a verdict, the second-guessers will be out in full force, no matter the outcome. We might marvel at the jury here. Twelve ordinary citizens: nine women and three men. Their job is to apply the law to the facts of the case and render judgment.

One could build a plausible case for any of the possible verdicts. At the top would be first-degree murder for strangling three young children. At the opposite end, Ms. Clancy could be found not guilty because she didn’t appreciate the wrongfulness of her actions or was unable to make her behavior conform to the law.

The facts are ugly, but the most disturbing development may be the media circus the trial has generated. Television cameras outside the courtroom feast on the sea of women clad in bright pink T-shirts emblazoned with slogans like “She Needed Help” or “Stand in Peace for Lindsay.” These women see Ms. Clancy as a victim: of a healthcare system that failed her, of a legal system stacked against her, and even, most crazily, of a husband some think is the real murderer despite the glaring lack of any evidence.

On the other side are those who dismiss all talk of postpartum psychosis. They argue, reasonably, that the three dead Clancy children are the real victims, and they have no sympathy for Ms. Clancy. Blogger Matt Walsh expressed this position bluntly on the social media site X: “In a just society, or at least a vaguely sane one, the only debate we’d be having about Lindsay Clancy is what method of execution to use, and whether or not it should be done publicly (it should).”

Whatever the verdict, Lindsay Clancy will pay a terrible price for what she did.

What is an observer to make of it? Justice cries out for accountability for the three innocent lives snuffed out by a mother who was supposed to love and protect them. But even the prosecution acknowledges that Ms. Clancy “was suffering from mental illness.”

The conflicts here go beyond the fundamental disagreement between defense and prosecution. Even the mental-health experts disagree, differing on the voice Ms. Clancy said told her to kill and whether she even suffered from postpartum psy-

chosis. The public disagrees about how to view murder in light of mental illness and the particular burdens shouldered by mothers. Jurors have to factor all this into their decision as best they can.

Citizens have the right to reach different conclusions. But even those with expertise in a relevant area (say, postpartum psychosis) lack what the jurors now have: the experience of sitting through nearly five weeks of testimony.

No verdict will satisfy everyone. As much as some people may empathize with Ms. Clancy, some argue there must be consequences for killing. And the idea that a mother who killed her own children would be let off scot-free seems an injustice. But justice under the law is limited to legal accountability, not some cosmic perfect reckoning.

No matter how the jury decides, Ms. Clancy won’t get off “scot-free.” She has lost her children, she is confined to a wheelchair, and her husband divorced her and remarried. Whether in prison or a mental-health facility, she isn’t going home when the trial is over. The justice already visited on her is harsher than any a court might deliver. That she brought all this on herself only adds to the living hell in which she now dwells.

Write to mcgurn@wsj.com.

BOOKSHELF | By Stuart Halpern

Confronting the Oldest Hatred

The Final Solution to the Jewish Question

By Dara Horn

Avid Reader, 384 pages, \$29

One evening in 2024, Dara Horn’s teenage son found an unexpected and alarming message. On the online forum where he and thousands of other contributors posted fan art about a whimsical videogame, the moderators in charge had announced that “Zionists will not be tolerated on our server” because “Zionism is genocide.” As Ms. Horn writes in “The Final Solution to the Jewish Question,” this bald statement was made with “no pretense” that it was part of any considered protest to the war in Gaza that had raged since Hamas’s slaughter of Israeli civilians on Oct. 7, 2023. “Instead,” she writes, “there was a categorical ban on the overwhelming majority of the world’s Jews, who were embodiments of evil.” Her son was being digitally denounced for his Jewish identity.

Ms. Horn, a novelist and essayist, had already made a significant effort to understand the wave of antisemitism that she saw spreading from websites to campuses to other institutions. In 2021 she published her first nonfiction book, a collection of essays under the darkly comic title “People Love Dead Jews” (the title of her current book makes a similarly mordant reference to the Nazi program of extermination). Her essays unfolded a provocative argument. Narratives of Jewish persecution—predominantly those around the Holocaust—have, she pointed out, deeply engaged non-Jewish audiences, who yet remain disengaged from, and often uneasy about, the real lives of contemporary Jews. In one example she cited in that collection, the Anne Frank House in Amsterdam prevented a Jewish employee from wearing his yarmulke at work for several months. An institution meant to preserve the memory of a Jew forced into hiding had thought it wise to force a living Jew to hide his identity.

After the publication of her earlier book, Ms. Horn writes, she received a “torrent of messages” from readers, documenting acts of hostility against Jews. Those who wrote to her “often clung to every possible shred of plausible deniability.” Her correspondents would insist that an offensive act or slur “was probably just a joke, or a misunderstanding, or had been done by teenagers, or by mentally ill people, or by ignorant people, or any of the other apparently enormous categories of people who were magically not responsible for their own actions.” At a synagogue in Ohio where the author gave a talk, the rabbi told her he was shocked by the recent news that the nearby Jewish day school’s own security guard had been arrested for making posts on social media that threatened the school’s children and parents.

The methods typically employed by Jewish communities in response to acts of hatred, she argues, are not up to the task. Many Jews, Ms. Horn explains, have felt pressured to make non-Jews comfortable about their presence “through self-deprecating and ultimately humiliating public displays in popular culture,” which often play up stereotypes in Jewish humor. To “prove their worthiness to their fellow Americans,” she observes, Jews offer lists of “American Jewish scientists and artists and entertainers and thinkers” as exemplary patriots and allies to other minority groups.

The author of ‘People Love Dead Jews’ argues that rising antisemitism cannot be fought using the methods that have failed before.

She is reminded of the early 1930s, when German Jews responded to rising antisemitism by publishing an encyclopedia of Jewish contributions to German culture and society. The volume was soon burned with thousands of other Jewish books. The episode, Ms. Horn observes sardonically, is enough “to make one question the premise” of seeking acceptance through assimilation.

As she formulates her proposal for a better answer, Ms. Horn laments that a knowledge of Jewish civilization is part of a “null curriculum”—history that is ignored in most American classrooms. This leaves a vacuum of knowledge that can be filled by what she calls the “big lie” that Jews are “collectively evil and have no right to exist,” a process exacerbated in recent decades by social media. In reality, she points out, Judaism is “foundational to the history of many of the world’s civilizations.” Treating it as marginal has a steep educational cost: “It is not possible to understand Christianity, Islam, the American founders . . . without understanding Judaism.”

When non-Jews are taught about Jews at all, it is in the context of Holocaust education required by state law (Illinois enacted the first such mandate in 1990). As Ms. Horn explains, “anything short of murdering six million Jews” can appear insignificant by comparison. Acts of harassment and intimidation—and even violent attacks against today’s Jews—can be dismissed or overlooked.

The stories of dead Jews, Ms. Horn reminds us, must be complemented by an understanding of the traditions, texts and practices of living ones. To that end, she describes her launch of the Tell Institute, which works with public-school teachers to educate students about Judaism’s contributions to civilization. Its programs present Judaism as a faith that seeks neither conquest nor empire, one firmly planted in a monotheistic moral and intellectual tradition.

Ms. Horn hopes, she writes, to convey that Judaism “is a movement built on laws that don’t rely on human rulers, built on an idea of commandedness that taught the world that freedom requires responsibility.” She wants better understanding of its ethic of debate, “the assumption that there will always be dissent, that ‘argument for the sake of heaven’ is a source of profound integrity.”

Citing the biblical book of Esther, in which a principled young woman surrounded by hatred for Jews asserts her identity to save her people, Ms. Horn makes it clear that we are at a crossroads. “Jews around the world have reached their Queen Esther moment,” she writes, “presented with the same choice their ancestors always faced. They can choose not to say anything, choose to disappear. . . . Or they can choose life and rise to the occasion.” She concludes that “the people who refuse to bow to tyrants are the final solution. They always will be.”

Mr. Halpern is the senior adviser to the provost at Yeshiva University. He is the author, with Wilfred McClay, of “Jewish Roots of American Liberty.”



GLOBAL VIEW
By Walter Russell Mead

What President Trump initially heralded as a “four to five weeks” war against Iran entered its seventh month Saturday. Far from winding down, the war intensified over the past few days.

From the serene heights of the foreign-policy establishment to the fever swamps of the online left and right, a consensus has emerged. The war is a disaster, the American equivalent of Britain’s humiliating defeat in the 1956 Suez crisis. American power can never recover in the Middle East, and Mr. Trump has suffered the greatest embarrassment of his career.

Yet the outlook is murky. Iran has fought back harder, and with more success, than Mr. Trump expected. While American casualties have been relatively light by historic standards, the war has been more expensive, more of a strain on American manpower and weapons stockpiles, and a greater political handicap than Team Trump anticipated. According to the Washington Post, the heads of the Army, Navy and Air Force and the four-star commanders of U.S. forces in Europe, Asia and Latin America have warned that continued deployment of forces in the Middle East is degrading America’s ability to deal with

threats elsewhere.

Yet Mr. Trump seems bent on continuing the conflict, and he has reasonable grounds for maintaining his optimism. With Goldman Sachs reporting that oil exports from the Persian Gulf have recovered to about two-thirds of their prewar level, Iran has failed to create a global energy crisis. The American blockade is causing more pain to the Iranians than the regime’s attempt to close the strait is causing the U.S.

It isn’t as easy as Trump expected, but don’t assume the U.S. has already lost.

Meanwhile, as Iran’s limited and largely ineffective response to the American attacks last weekend demonstrated, Mr. Trump is still able to control the escalation ladder. Between earlier military losses and fear of retaliation, Iran appears unwilling or unable to challenge the military status quo. The president appears to believe he can keep squeezing Iran’s economy indefinitely while avoiding the two things he most fears: a global economic crisis and the use of American ground troops.

Like the war in Ukraine, and like most wars, the U.S.-Iran conflict has turned into something longer and messier

than either side anticipated. Mr. Trump failed to overthrow the Iranian regime with his initial shock-and-awe airstrikes; Iran’s attacks on shipping in the Persian Gulf didn’t force Mr. Trump to back down.

Both sides face the question of how to win a long war that they didn’t expect. Iran’s rulers must do everything they can to constrict energy flows through the strait, hoping that the oil weapon will eventually produce enough of a crisis to force Mr. Trump to deal on their terms. They also hope that domestic pressure against the politically unpopular war will force his hand, perhaps after a Democratic victory in the midterm elections. And after the Washington Post’s interesting editorial decision to reveal classified information about American military vulnerabilities during a period of armed hostilities, the Iranian authorities have more grounds to hope that the U.S. cannot long sustain its current levels of military deployment in the region.

Mr. Trump for his part seems focused on intensifying the economic crisis inside Iran while limiting the fallout of the war in American politics and globally. To make that work, he needs to keep as much energy as possible flowing through and around the strait while turning up the pressure on Iran’s economy. This effort faces challenges as China and other countries draw down their strategic reserves and

as the approach of winter heightens energy demand in the Northern Hemisphere, but energy markets have so far proved more flexible and resilient than most observers expected.

Iran’s economy is already in dire straits, and figures like Mohammad Bagher Ghalibaf, a former Islamic Revolutionary Guard Corps commander and parliamentary speaker, are warning that the Islamic Republic may not survive economic strangulation. Mr. Trump likely believes he can step up the pressure without dramatic moves that would destabilize relations with China in the run up to Xi Jinping’s scheduled visit in late September.

Let us hope that U.S. and allied military and intelligence agencies are thinking through the next steps. Suppose economic pressure succeeds, and the Iranian population rises against the regime. Does America stand by as the regime renews its power through another bloodbath, do we intervene in what is likely to be a bloody civil war, or is there some third alternative?

Mr. Trump’s critics are right that six months into this war, the pathway out remains obscure. But this is how war normally works. Risk and unpredictability are baked into the cake. That is a good reason to avoid unnecessary wars; it is also a reason to avoid excesses of either gloom or joy as the fortunes of war shift and turn.

Higher Ed’s Secret Foreign Funding

By Craig Singleton

The Trump administration has made university accountability a signature issue, from combating discrimination to exposing foreign influence on campus. Now the higher-education lobby is trying to block the release of major foreign-donor names. The administration shouldn’t give in.

Universities receiving federal funds have been required by law since 1986 to report foreign gifts and contracts totaling \$250,000 or more annually. They haven’t always done so. The first Trump administration uncovered nearly \$6.5 billion in foreign gifts and contracts universities failed to disclose. The Biden administration failed to open any foreign-funding investigations, according to a September 2024 report from the House Select Committee on China. The second Trump administration restored enforcement and launched a public dashboard for reported foreign funding. The disclosures show

what’s at stake. In 2025 universities reported more than 8,300 foreign gifts and contracts, worth \$5.2 billion, including \$1.1 billion from Qatar and \$528 million from China. The Education Department has identified roughly \$380 million in historical university transactions with entities flagged by the U.S. government. That includes \$158 million involving companies on the Defense Department’s Section 1286 list, which identifies foreign institutions and talent programs “confirmed to be engaging in activities that threaten U.S. national security interests.” Another \$193 million involves entities on the Commerce Department’s Entity List, which restricts access to sensitive U.S. technology. Most of the flagged entities are Chinese, including organizations tied to Beijing’s military and nuclear program.

All foreign donors and contracting parties should be identified. In July the Education Department promised to publish “the names of all for-

eign sources from prior reporting cycles.” Yet it has repeatedly delayed doing so as higher-education groups press to keep those identities from public view.

The Association of American Universities, which represents 69 leading U.S. research universities, argues that publishing donor names would expand “reporting requirements

Washington has a list of names. What’s delaying disclosure?

beyond the statute’s text.” The American Council on Education, higher ed’s main lobbying group, has urged the department to withhold donor identities, warning that disclosure would have a “chilling impact” on lawful foreign giving. But federal law says disclosure reports “shall be public records open to inspection.”

Congressional investigations underscore the value of foreign-funding transparency.

A September 2025 review by the House Select Committee on China found roughly 1,400 Pentagon-funded research papers published from June 2023 through June 2025 with Chinese collaborators. More than half involved entities tied to China’s defense research and industrial base, including those working on hypersonic missiles, advanced propulsion systems and nuclear technology.

Universities receive billions in taxpayer support, conduct sensitive federally funded research, and increasingly work in partnership with institutions tied to America’s main strategic competitor. Counterparty names provide essential context for assessing those relationships. The administration shouldn’t let university lobbyists decide where transparency ends. The Education Department has the names and should keep its promise to release them.

Mr. Singleton is senior director of the China Program at the Foundation for Defense of Democracies.

OPINION

REVIEW & OUTLOOK

The Data Center Panic and U.S. Decline

Can the U.S. political system meet the challenges of our rapidly changing age? The answer is far from certain, and the latest evidence for pessimism is the election-year panic over data centers.

The centers that look like large warehouses are crucial for artificial intelligence. The U.S. is in an AI competition with China, which won't be a benevolent force if the U.S. falls behind. Without the energy and the data centers to power it, America's safety and prosperity will be compromised.

Yet watching the election campaign, you'd think data centers are the biggest problem America faces. We're running scared over investment that creates jobs and pays local property taxes.

* * *

The political backlash started on the left, and Bernie Sanders now wants a nationwide halt to new data centers. But Democrats in Senate races across the country are signing up for some version of a slowdown. In Ohio Sherrod Brown is making the issue the center of his comeback bid against appointed GOP Sen. Jon Husted.

Even politicians who have supported data centers are turning. Illinois Gov. JB Pritzker once courted data centers but now has turned them a cold shoulder. Pennsylvania Gov. Josh Shapiro, who has a huge lead in his re-election campaign, this month issued an executive order restricting their development.

Republicans are also getting in on the act. GOP Rep. Tom Tiffany is running ads in Wisconsin in his campaign for Governor calling his opponent "Data Center David Crowley." "Our lakes run dry, family farms paved over," says the fear-mongering spot.

Texas Gov. Greg Abbott in August paused new construction pending the completion of a state-wide audit, citing concerns about data center power and water use. He blamed AI firms: "They basically dug their own grave for the problem that's been caused for them and that's why they got the backlash they deserve."

It's true the AI industry has hurt its own cause by fueling speculative anxiety about mass unemployment. AI developers have also failed to explain how data centers benefit local communities. But the larger failure has been the lack of political leadership in explaining the technological and economic transition now underway and how to address it.

On data centers, there's a strong case to be made. The U.S. has more than 5,400 data centers, which are the backbone of the internet and power the apps on your smartphone. Data centers enable Zoom meetings, online food deliveries, video streaming, instant retail stock trading and more. If data centers went dark, so would the modern economy.

New large-scale data centers are needed to train and run AI models, and more than chatbots. Businesses large and small use AI to boost pro-

ductivity, which lets them pay workers more. Steel maker Cleveland-Cliffs recently announced an upgrade to an Ohio plant that will incorporate AI to improve efficiency.

Utilities use AI to prepare for natural disasters and reduce power outages. AI models are helping diagnose cancer at earlier stages and develop cures. Data centers bring high-paying construction jobs, and skilled blue-collar workers are needed to run them.

If data centers disappeared from Loudoun County, Va.—known as Data Center Alley—homeowners would need to pay \$5,800 more a year in property tax for the same government services, according to one analysis. Teachers in Louisiana's Richland Parish this year received bonuses up to \$50,000 thanks to tax revenue from Meta's AI data center.

Data centers also generate scant pollution. Their CO2 emissions mainly stem from the natural gas plants that power them. But modern gas generators produce upward of 90% less fine particulate matter, sulfur dioxide and carbon monoxide than a steel mill.

Data centers also deploy efficient systems to recirculate wastewater, so they don't affect the supply of drinking water. Microsoft's new data center in Wisconsin will use about only four Olympic swimming pools of water this year, half as much as a car wash. Golf courses use about 30 times more water than data centers.

Americans are understandably concerned about rising electric bills, but data centers aren't the culprit. Average electric rates nationwide have increased roughly in line with inflation since 2016, with larger increases in the Northeast and California, largely because of climate policies such as net-metering that lets homes with solar panels free-load on the grid. A study by the Electric Power Research Institute found that data centers between 2015 and 2024 reduced residential rates by spreading the grid's fixed costs over a larger electric load.

In any event, most data center developers have agreed to cover the incremental costs they add to the grid. The Trump Administration was a leader here in bringing AI firms, utilities and political actors together, and most AI firms have cooperated.

* * *

The surge of opposition to data centers reflects misinformation and anxiety about the future more than it does reality. Both are driven in part by the same people who have sought to block shale fracking, liquefied natural gas exports and other projects that enhance American prosperity and national security.

Mr. Trump is finally speaking up, with a Truth Social post Monday pointing out that data centers will provide "far lower taxes and jobs all over the place." Please keep it up. The President rightly notes that if the bipartisan campaign against data centers succeeds, the winner will be the Chinese Communist Party.

and justifies Hezbollah and Houthi attacks, he means it.

Ms. Dingell didn't help her party when she said recently she's tired of being asked about Mr. Piker. "I am done," she said. "So don't any reporter ask me again about Hasan Piker." Telling the press not to ask questions signals that a politician is too embarrassed to answer.

It's worth watching how Democrats handle Mr. Piker, whom they once thought was their answer to Joe Rogan, but who as a political matter represents the serrated edge of the party's antisemitic wing. Mr. Schumer has embraced Mr. El-Sayed, though the Michigan nominee has said he won't vote for Mr. Schumer for Senate leader.

Mr. Schumer has taken great pride across his career as an opponent of antisemitism and a (less and less reliable) supporter of Israel. With Rep. Alexandria Ocasio-Cortez looking over his shoulder in his 2028 re-election year, Mr. Schumer's political career may be nearing its end. Why not publicly say Mr. Piker's brand of antisemitism has no place in the Democratic Party and stand with some honor?

Taiwan's Drone Realism

The world is boiling from Iran to Ukraine, so it's worth noting progress on deterring war where it's still preventable. Taiwan's latest drone push is important, and the question is whether President Trump will back up this model ally with more arms support.

Taiwan's Legislature has passed a bill to spend \$7.6 billion on drones in the coming years, and the goals are to purchase unmanned systems and expand its own industrial base. Taiwan's government is trying to adapt to the evolution in warfare and deter the Chinese Communist Party from mounting an invasion or blockade of the island of 23 million free people.

Taiwan exported more drones in the first quarter of this year than last year's 130,000 units, by think tank estimates. Most end up in Ukraine. Taiwan's defense against China would look much different from that land war. But a cascade of unmanned vehicles could help create a "hellscape" in the Taiwan Strait for a Chinese armada, as U.S. Indo-Pacific Commander Adm. Sam Paparo has put it.

This drone realism is notable because a perennial Washington complaint is that the island buys too many big platforms like fighter jets and isn't focused enough on an "asymmetric"

defense against a larger adversary.

The island's politics are also divided, with a bitterness Americans would recognize. President Lai Ching-te wants Taiwan to spend 5% of GDP on defense by 2030, but his party doesn't control the Legislature. Yet Taiwan is still making progress, including passing extra defense money this year, and President Lai has proposed another 18% boost in defense spending for next year.

One practical step the U.S. can take: Passing the bipartisan Blue Skies for Taiwan Act, sponsored by Sen. Ted Cruz, among others. The bill tries to push the U.S. government to work more with Taiwan on drone production, particularly on building a supply chain free of Chinese parts, one of the biggest challenges in making cheap unmanned vehicles at scale.

President Trump can also unlock a pending \$14 billion arms sale to Taiwan. It has been in limbo ahead of Xi Jinping's visit to Washington in September. Taiwan sees its future in the free world and is willing to sacrifice to preserve its liberty. Other Presidents have been able to conduct diplomacy with China without betraying U.S. commitments to Taiwan, and there's no reason Mr. Trump can't do the same.

LETTERS TO THE EDITOR

The Quiet Bond Risk of Bloated State Policy

Regarding Richard B. McKenzie's op-ed "It's Hard to Tax Things That Move" (Aug. 20): I am indebted to Mr. McKenzie for reminding us that he and Dwight Lee had called attention to the ease with which labor and capital could flee high tax jurisdictions in their 1991 book "Quicksilver Capital."

The technical and economic changes of the decades since have greatly increased the ease of flight. The one tax base that isn't mobile is land, but even land, if too heavily taxed, will be abandoned rather than being developed.

Suppose that politicians want to spend more than a land tax could yield and voters flee in response to higher taxes on income or capital. The easy solution is to borrow. As the fiscal condition worsens, bond investors may demand higher interest rates and bond underwriters impose restrictions on spending or require higher taxes. In response, voters can move their wealth and income from New York, Illinois and California to Florida, Tennessee and Texas. But if they take their high taste for public services with them, the process can begin again. The municipal bond market

may become increasingly unstable.

WILLIAM S. PEIRCE
Gates Mills, Ohio

I spent my career as a bond analyst and was always surprised at how differently the rating agencies rate states from corporations with comparable leverage ratios. The reason is that the agencies believe states can always simply increase taxes, and so their debt is far safer, comparable to a business monopoly which can raise prices with impunity. In short, they assume a monopoly power for states, believing that there is nothing a resident can do.

But as Mr. McKenzie points out, governmental jurisdictions actually do have competition, and people and businesses can move more easily than in the past.

California currently has an S&P general obligation rating of AA-, and no state has a rating below A-. I think that the rating agencies will wind up more embarrassed by their ratings for states than they were with their ratings for collateralized mortgage obligations before the 2008 housing collapse.

WINSLOW MARSTON
Morristown, N.J.

Readers Respond to Roland Fryer on DEI

Roland Fryer's op-ed "Jason Arday and What's Wrong with DEI" (Aug. 26) is certainly right: The "opportunity [provided by DEI] alone didn't produce these scandals. Refusing to hold anyone to a real standard afterward did." But he understates the scope of the issue. Because high-school grades and recommendation letters are so inflated, even admitting students with excellent credentials amounts to taking a chance. Once in college, students encounter easy courses with inflated grading that don't challenge them to develop their potential. The problem continues for students who go to medical or law schools without real grades. Mr. Fryer is fortunate to have had professors who pressed him to become good by working hard. Sadly, professors are now more attuned to students' struggles and, consequently, try to "help" them by lowering their expectations.

Real education is less likely to happen today.

PROF. EDWARD C. HALPER
University of Georgia
Athens, Ga.

Mr. Fryer's op-ed was enlightening and important. His points also bring clarity to what is wrong with our education system beginning even at the earliest of ages and why school choice, especially in the underserved communities, is imperative.

It has taken a few generations to

degrade our public schools and it will take a few, if not more, to restore them.

Imagine a grade-school parent who has a child zoned for a failing, unsafe public school. The child is bright and if motivated can reach his potential. That child needs to have a path to a school that will demand his best, hold him accountable and not make exceptions for him based on his race, ethnicity or financial status. If he flourishes by the time he applies to college or for a job, the decision to admit or hire will be far less risky.

Not every child falls into this category. But it is vital we take the percentage that can benefit from school choice and start them on the path now. All the guidance Mr. Fryer received doesn't have to wait until college. It needs to begin earlier, so DEI becomes almost unnecessary in years to come.

GWEN SULLIVAN
Ridgewood, N.J.

The tragedy of Jason Arday extends beyond the issues Mr. Fryer describes so well in his op-ed.

As universities both in the U.S. and Europe focus on telling their students what to think instead of how to think, there is no reason not to hire an entertaining but unqualified figure like Arday, so long as he parrots the party line.

Thomas F. Berner
Yonkers, N.Y.

Dolly Was More Than a Crystal-Clear Voice

Beyond the crystal-clear voice Bob Greene honors in his op-ed "Dolly Parton, the Only Voice in the World" (Aug. 26), Parton was a business-school lesson in the value of developing one's own brand, cultivating an appealing (and consistent) image and retaining ownership of one's intellectual property. But her life was also testament to her combination of determination, talent, self-confidence and hard work, culminating in success, without sacrificing decency. Despite her self-deprecation, this soulful but savvy genius from Appalachia excelled with grace and class.

"Music is the voice of the soul," Parton told American Songwriter in 2022. Her songs were a window to her inveterate optimism, love of her home territory, faith in God and people, and empathetic understanding of

human nature. She was an American original, a Renaissance woman, and—thanks to her genuine warmth and positivity—a cross-cultural unifier of humanity. She walked her talk, using her material bounty to establish and give generously to institutions that directly elevated the human condition. Not least, and perhaps foundationally, she was grateful and kind—to myriad people, in all situations, private and public.

May we all be more like Dolly.

HARRIET CHAPMAN
Akron, Ohio

Can Washington Cut 15%?

Regarding your editorial "How the U.S. Went \$40 Trillion in Debt" (Aug. 21): Why can't we roll back federal spending to the pre-pandemic historical average of 20% of gross domestic product instead of the current 24%? One big reason is that pre-pandemic we weren't spending 3% of GDP on interest. Interest rates and the debt were both lower than today. If we want to hold spending to 20% of GDP that would leave only about 17% of GDP for all the things we were spending money on before Covid—a 15% across the board reduction.

KEVIN CLARK
Franklin, Tenn.

Pepper ... And Salt

THE WALL STREET JOURNAL



SEAN McDONNELL
Minneapolis

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OPINION

The Rich World’s Climate Distraction

By Indermit Gill
And Bjorn Lomborg

The past 75 years have brought the greatest improvement of human welfare in history. But over the past decade, much of that progress has stalled. This happened at the same time that the rich world shifted its attention to climate change. This isn’t a coincidence, and it has to change.

Consider extreme poverty, long defined as living on less than \$1 a day, adjusted for inflation and purchasing power. In 1950, more than half of humanity was that poor (using the 1985 dollar as the benchmark). Today the share is 7.6%, the lowest ever recorded. Average schooling has almost tripled, from 3.2 years to nearly nine. Electricity access has soared. Problems remain, but the gains have been spectacular.

Yet that development has lately

The World Bank and other institutions lose their focus on the best ways to help the poor.

slowed to a crawl. After almost two centuries of declining poverty, the number of poor people in the world hasn’t budged since 2016. Global progress is at its slowest pace since 1950, according to the World Bank.

There are many causes, but one stands out. In 2016, the world retired its Millennium Development Goals—a short list of mostly efficient, targeted aims: cut poverty, disease, and maternal and child deaths, and get every child into school. In their place came the Sustainable Development Goals. Climate change became the rich world’s obsession.

Nowhere is this obsession clearer than in the development banks,



ROBERT NEUBECKER

whose core purpose is to help the poor develop. Yet in 2025, climate finance from multilateral development banks to low- and middle-income countries topped \$103 billion—nearly half of all their financing. The World Bank alone directed 48% of its lending to climate finance.

One of us (Mr. Gill) stepped down this week at the end of a four-year term as the World Bank’s chief economist—a position that gave him an insider’s view of the fixation.

The banks, like many development organizations, convinced themselves that because poor people are more vulnerable to climate change, climate policy is crucial for their development. The logic is seductive but wrong. Poor people are more vulnerable to everything—disease, hunger, broken infrastructure, economic shocks. The question is whether climate policy is the best way to help them. Examined rigorously, policies focused on traditional development goals, such as reduced poverty and improved health, generally win decisively.

Sustained economic growth is the surest predictor of a country’s ability to withstand climate shocks. A 10% rise in per capita gross domestic product can reduce the number

of people at high risk from climate-related hazards by almost 100 million. Prosperity is the ultimate climate adaptation strategy. A hurricane kills hundreds in Haiti; the same storm merely inconveniences Florida. Resilience runs through development—not through a solar farm that raises power prices and slows industrialization.

The core problem is opportunity cost. Every dollar subsidizing solar panels or carbon accounting is a dollar not spent on schools, maternal health or clean water. Research by the Copenhagen Consensus, with more than 100 economists and several Nobel laureates, compared the returns. Smart investments in nutrition, health and education routinely deliver \$40 to \$110 in social benefits per dollar. Climate-mitigation investments—funding emissions cuts in poor countries—often deliver much less back.

The trade-offs are concrete. For \$2.50, an expectant mother can receive micronutrient supplements that prevent stunting and lifelong cognitive damage in her child—returning nearly \$100 of long-term benefits per child. Expanding diagnosis and treatment for tuberculosis and malaria, which still kill more than a million people a year, returns more than \$45

You Need to Invest in AI, but Don’t Expect a Return

By Anil K. Gupta

As a general-purpose technology, artificial intelligence is rapidly making its way into every facet of the business world. The investment in infrastructure and the expense of integration are leading boards to ask: When are we going to see a return on all of this investment? The counterintuitive and uncomfortable answer: maybe never.

As AI becomes embedded across industries, it will generate enormous economic value. But much of this value will be competed away, flowing to customers in the form of lower prices, better products, and faster, more personalized services. In such an environment, making firm-level ROI the primary measure of success is misguided; worse, it risks obscuring why firms must invest in AI at all. The relevant comparison is between investing and holding ground against competitors or not investing appropriately and losing it, a trade-off that never shows up in an ROI calculation.

AI clearly creates value, but that doesn’t mean a firm can always capture and retain it. If every insurer cuts the cost of handling a claim by 30%, competition will eventually pass much of that gain to customers in the form of lower premiums, better service or both. Insurers have become more productive, but no insurer earns a higher return as a result. Early movers enjoy an advantage, but it is transitory. This helps explain a puzzle that currently pre-occupies the business press. Disappointing returns on AI are read as evidence that the technology has been oversold. The more likely explanation is that the value is real but flowing to customers.

AI companies, cloud providers and other intermediaries have powerful incentives to reduce the cost and complexity of adoption. Their growth depends on distribution. Thus, in most competitive industries (think retail, insurance and automotive) any AI capability available to you is or will soon be available to

your competitors as well—whether in sourcing, logistics, operations or customer service. That growing parity is precisely what makes it difficult to capture and retain the value AI creates.

Investment in AI should be approached as investment in infrastructure, not in a portfolio of individual projects built around local data sets and narrow task automation. Infrastructure doesn’t lend itself to project-by-project ROI calculations, which is part of why the ROI

This revolutionary tech will make your competitors more efficient, so you’ll need it simply to keep up.

question misfires. Organizations are a set of interconnected processes. Data that sit in silos rob machine-learning models and AI agents of much of their power. AI infrastructure provides the common data, models, governance and architecture; workflow redesign is where those capabilities become economically useful.

In striving for competitive advantage, recognize that, to paraphrase the Red Queen from Lewis Carroll’s

“Through the Looking-Glass,” it may take you all the running to just stay in the same place. As AI becomes ubiquitous, any advantage to be gained will depend on the complementary assets around it. The three that matter most are proprietary data, redesigned workflows and organizational capabilities.

AI models trained on proprietary data—decades of product formulas, sensor logs from machinery or customer transactions—can produce insights and predictions that off-the-shelf models can’t match. But proprietary data alone is insufficient. Several insurers may each have proprietary data on auto claims. But if the data are equivalent, they yield no advantage. What matters is differentiated, superior data.

You also need deep workflow integration. Using AI to automate individual tasks improves productivity, but these gains are easy for competitors to replicate. Greater advantage comes from redesigning how work gets done across interconnected processes. An insurer, for example, can use AI to automate claims processing and to connect claims data with underwriting, pricing, fraud detection and customer service. Such integration is harder to replicate because it requires changes in processes and systems,

for each dollar invested.

The energy dimension is starkest. Much of Africa uses less electricity per person than a single refrigerator in a Western home. The rich world built its wealth on cheap, reliable fossil fuels, which still supply more than 80% of global energy. Yet development banks refuse to finance new fossil-fuel projects in poor countries. Germany has spent more than €700 billion on its energy transition since 2002; power prices more than doubled and its economy is still almost four-fifths fossil-fueled. To demand that African nations achieve what Germany can’t—with a fraction of the resources—isn’t climate leadership. It is hypocrisy.

None of this is to say we should abandon the climate—both adaptation and green innovation deliver strong returns on investment.

But the rich world’s development institutions must overcome their climate fixation. It’s a welcome sign that the World Bank has finally announced it will retire its climate spending goals, but with its main climate action plan still firmly in place, the shift risks being superficial. Britain’s new foreign secretary, Ed Miliband, has taken the U.K.’s governor seat at the World Bank. He vows to keep climate at the heart of the institution.

Most of humanity is still poor. For them, we should spend billions on tackling urgent, cheaply solved problems before spending trillions to nudge the thermometer in a century. Tellingly, Africans ranked climate change 31st among 34 priorities in a recent Afrobarometer survey. We must rediscover the smart, focused development solutions that transformed the world in the past 75 years—and put the best development policies first.

Mr. Gill was chief economist of the World Bank Group (2022-26). Mr. Lomborg is president of the Copenhagen Consensus Center and author of “Best Things First.”

not merely access to AI models.

Organizational capabilities matter even more. AI is evolving too rapidly for any model, application or workflow to hold an advantage for long. You do need technical talent that knows how to deploy AI. But you also need managers who understand the technology well enough to see emerging opportunities and go after them. And you need a culture that rewards experimentation, learning what works and building on that learning. An organization’s accumulated ability to learn and adapt is hardest for competitors to replicate.

“What is the ROI on AI?” is the wrong question. Instead, business leaders should ask: “What will happen to our competitive position if we don’t make this investment?” and “What complementary assets do we possess or can we build that might enable us to capture some of the value if we do?” The returns from AI will be real. But they may show up as ground held rather than ground gained.

Mr. Gupta holds a chair in strategy at the University of Maryland’s Smith School of Business and writes the newsletter Inconvenient AI.

Gerard Baker is away.

California Wealth Tax Spares No One

By David R. Henderson

California’s Proposition 40 would impose a one-time tax of 5% on people with a net worth of \$1 billion or more. The tax would cost everyone: By discouraging capital formation, it would ultimately cause slower wage growth. But there’s a much more direct threat to people worth far less than \$1 billion.

The initiative’s Section 50310 states: “The Legislature may amend the 2026 Billionaire Tax Act, by statute passed in each house of the Leg-

islature . . . [with] two-thirds of the membership concurring, if the statute is consistent with and furthers the purposes of the 2026 Billionaire Tax Act.”

Those purposes are to raise money to spend on healthcare, education and food assistance. California’s heavily Democratic Legislature could use the law to increase taxes on people who aren’t close to being multimillionaires—let alone billionaires.

Article XIII of California’s Constitution authorizes the Legislature to tax certain forms of wealth. Most personal property is taxable at the same rate as real property (1%), while taxes on stocks and bonds are capped at 0.4%. The authors of Proposition 40 apparently understood this and wrote Section 50310 to supersede Article XIII.

We’ve seen this before. After the 16th Amendment authorized the federal income tax, it started small. In 1913 the tax rate on married couples filing jointly was 1% on income up to \$20,000 (equivalent to some \$674,000 today). The top rate was 7%, on income above \$500,000 (\$16.8 million today). Five years later, in the midst of World War I, the rate was 6% on income up to \$4,000 and 77% on incomes over \$1 million.

Under Presidents Warren G. Harding and Calvin Coolidge, and with the

urging of Treasury Secretary Andrew Mellon, Congress brought rates down substantially at all income levels. But the lowest level they reached, in 1928, was still much higher than in 1913: 25% for incomes over \$100,000, and 1.5% to 9% on income up to \$20,000.

Then World War II brought higher rates again at all levels. Tax rates on lower incomes were high: 23% on income up to \$2,000. Before World

A provision would let the Legislature impose levies on assets of those worth well under \$1 billion.

War II, the income tax was thought of as the class tax—a high tax on high-income people. In World War II, it became a mass tax.

There’s a lesson here. If you vote for a measure to tax the very wealthy, you might find yourself paying rates even above those meant for the very wealthy. Proposition 40 has the potential to become a stealth tax on all Californians.

Mr. Henderson is a research fellow with the Stanford University’s Hoover Institution and editor of the Concise Encyclopedia of Economics.

They Forget Who Started The War

By Elliot Kaufman

The campaign for the next United Nations secretary-general is under way, and the latest straw poll of Security Council members has three South or Central Americans on top. The leading candidate praises Fidel Castro and rages ignorantly, and tellingly, at Israel.

The third- and second-place candidates in the Aug. 21 straw poll could be promising. Rafael Grossi, the Argentine leader of the International Atomic Energy Agency, is a formidable diplomat with experience navigating between world powers. In particular, he has been professional in holding Iran accountable for its nuclear deception. Rebeca Grynspan, a Costa Rican economist, politician and U.N. trade leader, is viewed as moderate and reform-minded.

In first place is Carolyn Rodrigues-Birkett of Guyana. She has a conventional résumé as a U.N. ambassador and former foreign minister with experience in U.N. food work. But her views, similarly conventional in these circles, aren’t for the weak of heart or the strong of head.

The top candidate for U.N. secretary-general can’t face the truth of Palestine in 1948 or Israel in 2023.

Humanitarianism didn’t restrain Ms. Rodrigues-Birkett while celebrating 40 years of Guyanese diplomatic relations with Cuba. “To speak about Cuba, its achievements, its resilience, its focus on human development,” Ms. Rodrigues-Birkett said in 2013 as foreign minister, “cannot be done without paying tribute to the visionary, determined, revolutionary behind it all, Comandante Fidel Castro. . . . Let us also pay tribute to Comandante Fidel not only for what he has done for Guyana, but also for humanity at large.”

For Israel, by contrast, Ms. Rodrigues-Birkett is full of invective. Speaking at the U.N. Security Council over the past few years, she repeatedly accused the Jewish state of “genocide” along with “colonialist aspirations, fueled by a racist and religious ideology of superiority.”

Ms. Rodrigues-Birkett even dumped on Israel for trying to get Gazan civilians out of harm’s way. “Quite cynically,” she said in May 2024, “it has urged civilians to evacuate to safe zones.” This was right after Israel had evacuated civilians from the city of Rafah in days, despite the world’s insistence that it was impossible—and that Hamas thus had to be left in control of its arms-smuggling hub.

Perhaps most instructive is Ms. Rodrigues-Birkett’s September 2024 remark on the history of the Arab-Israeli conflict. She began with the usual cliché to excuse Hamas: “The situation in Palestine today did not begin on 7 October 2023.” Instead, she continued, “We must cast our minds back to 1948 because it was in that year that Israel first violently rejected the two-state solution.”

In reality, the Jews of Palestine accepted the two-state U.N. Partition Plan, and the Arabs of Palestine went to war to prevent it. Their aim was to extinguish any Jewish state, and their theme was extermination—only a few years after the Holocaust, which their leader had urged Hitler to bring to Palestine. They lost despite the help of five Arab armies, only to recast their defeat and suffering as Israeli aggression.

As the Israeli writer Shany Mor has noted, the recent war followed the same pattern. Hamas started the war by massacring Jews on Oct. 7, 2023, in a state of ecstasy, which the Palestinian masses shared as they celebrated the victory. But the initial ecstasy was memory-holed as soon as Israel fought back. Gazans suffered under bombardment as Hamas fought from and beneath Gaza’s cities instead of releasing the hostages. For Palestinians, U.N.-style humanitarians and most of the press, the war again became a tale of Israeli aggression and Palestinian victimization.

It is simpler to see it that way and to imagine, with Ms. Rodrigues-Birkett, that the Palestinians merely want to share the land. Otherwise, what to make of a national movement that turns down its oppressor’s offers of statehood—not only in 1948, but twice in this century—and instead launches gruesome waves of terrorism and war after war it can’t win? What to make of an “international community” that rewards it every time?

Mr. Kaufman is a Journal editorial board member and a co-author of “In the War Room: The Inside Story of Israel’s Fight Against Hamas and the Iranian Axis,” forthcoming Sept. 8.

Opinion

Her movement used to fight fascism. Now Catalan Nationalism fights globalism.

By fiercely opposing migration from North Africa, **Sílvia Orriols** has turned her small Catalan Alliance into one of the fastest-growing political parties in Europe.

Christopher Caldwell
Contributing Writer

A lot of politicians in Spain were disoriented this summer when more than 70,000 migrants overran the beachfront border that separates Morocco from the Spanish outpost of Ceuta. But not **Sílvia Orriols**. The mayor of Ripoll and a member of the Catalan regional legislature in Barcelona, she was on familiar ground: By fiercely opposing migration from North Africa, she has turned her small Catalan Alliance into one of the fastest-growing political parties in Europe, with the potential to disrupt Spanish politics on a much larger scale.

Ms. Orriols criticized the lack of an effective police presence in Ceuta and mocked the Spanish state's priorities. She reminded her followers on X that in 2017, Catalonia's attempt to stage a vote on independence from Spain led to a far more severe crackdown by the national police. "They beat Catalans with truncheons and fired rubber bullets at us for voting in a referendum," she wrote. "Have you seen any truncheons or rubber bullets in Ceuta? It is urgent that we break with this state that allows repeated violations of its borders."

In the stridency of her anti-immigration position, Ms. Orriols, 41, can sound like the staunchest kind of right-wing nationalist, a type familiar in European politics today. She wants a moratorium on immigration. She has called for deporting all immigrants who have broken the law in Catalonia, even those who have committed small crimes. She has campaigned to remove halal menus from public schools and argued that Islam is incompatible with Western values. She is the latest example of how anti-immigration fervor can galvanize voters in fast-changing societies.

But apart from her attitude toward migration, Ms. Orriols's views are not particularly conservative. She has no objection to the constitutional innovations of the past century in women's rights and gay rights. "I don't believe in abortion," she said when I interviewed her at Ripoll's City Hall in June, "but I believe in the right to abortion." She wears a cross but appears more comfortable talking about Catalonia's Christian roots than about Christianity itself. Nor does she see herself or her party as wrapped up in any international movement of the right or in sympathy with other European parties.

This is not necessarily a contradiction. For most of the past century, the tradition that Ms. Orriols represents —



A monument to the victims of the 2017 Barcelona and Cambrils terrorist attacks in front of Ripoll's town hall last month.

Catalan nationalism — has been left-leaning, opposed to authoritarianism and associated with a cosmopolitan elite in Barcelona. Catalonia was a last redoubt of the second Spanish Republic against the military uprising of Gen. Francisco Franco, which triumphed with the backing of Nazi Germany and Fascist Italy in the late 1930s. Catalans chafed under his dictatorship for four decades, venerating their history of resistance and being venerated for it, thanks in large part to George Orwell's "Homage to Catalonia."

There is no question, however, that in her unwavering opposition to immigration, Ms. Orriols is fashioning a version of Catalan nationalism that is more populist, more rural and more confrontational. The people she represents are farmers and villagers in the Pyrenees, not professors and consultants there are foreign born, and in 2022, more children had fathers born in Africa (35.1 percent) than fathers born in Spain (34.5 percent). Ripoll,



PHOTOGRAPHS BY ANGEL GARCÍA MARTOS FOR THE NEW YORK TIMES

nia from one of political power to one of ethnic survival — and opened herself up to accusations of bigotry in the process.

HER OUTLOOK IS BUILT on familiar themes of culture and language. Catalonia's history runs back to Charlemagne. Its language has less in common with Spanish than with the Occitan tongues of southern France. "Before Franco, 95 percent of the people spoke Catalan; with Franco, big waves of migration began," Ms. Orriols said, referring to an influx of labor from poorer parts of Spain in the 1960s. "And now, thanks to immigration all over the world, we're down to 30 percent — from 95 percent to 30 in less than a century."

She added: "That's our death knell as a nation. If we don't reverse this, if we don't manage to change this, our nation is dead."

This message is gaining political momentum. Catalan Alliance took only 3.8 percent of the vote in regional elections in 2024, winning two seats in the regional assembly. But a June poll delivered a shock: It showed the party now has the backing of 15.1 percent of Catalans, enough for 25 seats if elections were held today — which would marginalize the region's old center-right party, Junts, in the same way the National Front has done to the center-right Gaullists in neighboring France.

The political scientist Xavier Torrens, the author of a book on Ms. Orriols, told an interviewer for the Barcelona daily *La Vanguardia* that whereas Marine Le Pen had taken a "slow route" to power, Ms. Orriols and Catalan Alliance were more likely to take the "fast route."

Many Spaniards have been shocked to see anti-immigration sentiment making such headway in progressive Catalonia. There may be a larger lesson here for the West. Immigration has helped bring a once-repudiated ex-president back to power in the United States, made nationalist parties the most popular in Germany and in France, driven Britain from the European Union and strengthened restrictive parties in Hungary and Poland. While Ms. Orriols's magnetism and oratorical power have been indispensable to her success, her rise is further evidence that among electoral issues, limiting migration has a singular power to reshape politics and buoy up politicians, in any kind of society.

MS. ORRIOLS WAS BORN in 1984 in Vic, a city just south of Ripoll with a vast, picturesque plaza, and a meatpacking industry that has made it a magnet for immigrants. Today 30 percent of residents there are foreign born, and in 2022, more children had fathers born in Africa (35.1 percent) than fathers born in Spain (34.5 percent). Ripoll,

which has a population of about 11,000, is also changing fast. There were few immigrants to speak of in its schools when Ms. Orriols was a student a quarter-century ago. Today immigrants account for 16 percent of Ripoll's population and about 45 percent of its births.

Ms. Orriols read a lot of Catalan history in her youth and earned a library science degree in 2004. During our interview in Ripoll she described a political trajectory that took her from sympathy with the youth wing of the Republican Left of Catalonia (the present-day powerhouse of the nationalist left) to her present position.

In 2017, in her early 30s, she rallied to the movement for independence by referendum spearheaded by the Republican Left and the center-right party that would eventually become today's Junts. The Spanish government deemed the referendum illegal. When the vote produced a low-turnout landslide and a Catalan declaration of independence, Madrid suspended parts of Catalonia's autonomy and prepared sedition cases against the referendum organizers (many of whom were later convicted and sentenced). Ms. Orriols's commitment to Catalan independence only intensified.

But something else happened in 2017 to affect Ms. Orriols's nationalism. That August a group of young men carried out Spain's worst terrorist attacks in more than a decade, including racing a van through Las Ramblas, the iconic pedestrian street in Barcelona, killing

13 and wounding 130 others. The ring-leader of the ISIS-linked plot turned out to be Abdelbaki Essati, a charismatic imam at Ripoll's mosque who had recruited most of the plot's operatives from young members of Ripoll's Moroccan community. They spoke good Catalan and had struck their neighbors as well integrated.

Even today, Ms. Orriols's social media accounts radiate an undiminished incredulity and rage. "A Moroccan tried to stab a 13-year-old girl to death," she posted this month on X, referring to an assault in the Catalan town Puigcerdà allegedly by a North African man. "And yet there are still scoundrels who want to 'welcome' more of them."

In May 2019, Ms. Orriols won a seat on the Ripoll City Council for the National Front of Catalonia, the name of an old party of the nationalist left. Her platform, however, was already so hostile to immigration that her rivals attacked her as a xenophobe and a rightist. The attacks hardly dented her popularity.

AS LATE AS THE 1990s, Spain had little immigration to speak of. That changed with a vengeance. Starting the century with one of the lowest fertility rates in the world (1.2 children per woman) and roughly 40 million people, it now has close to 50 million, and about 10 million of these are foreign born. Most immigrants arrive from Latin America, sharing Spain's language and its religious traditions.

Madrid, where many restaurant workers and gardeners hail from Central and South America, will remind urban Americans of the Clinton years. So will the booming economy. Spain's gross domestic product is the fastest growing in Western Europe (though many economists doubt the boom is a boom at all, if one measures G.D.P. per capita). Prime Minister Pedro Sánchez

offered permanent residence to hundreds of thousands of immigrants last winter; more than a million have applied.

But Catalonia's experience with immigration has been different from — and more disruptive than — the rest of Spain's. Like the rest of the country, Catalonia has seen its population bulk up, from six million in 2000 to more than eight million now. But there, Spanish is not the ancestral language. In addition, more foreign-born arrivals come from Morocco than from any Latin American country. Longtime residents, particularly in Barcelona, feel their culture is being drowned. It is a worry of long standing: When Catalonia experienced migration from poorer parts of Spain in the 1960s, it led to a rising linguistic assertiveness among Catalans.

The stimulative effect of immigration has also been less evident in Catalonia than in Madrid. Greater Madrid's G.D.P. blew past Catalonia's in 2019. And with less upside, the downsides of the surging population are felt more acutely. Alleging that Ripoll's immigrant minority collects nearly half of the town's welfare benefits, Ms. Orriols has tightened scrutiny of the municipal procedure by which people register for services and benefits, excluding those who cannot document their residence.

MANY CATALANS HAVE BEEN left confused: They traditionally thought of their nationalism as an exceptional one, an underdog's allegiance — not provincial and jealous but open and idealistic. Even before Catalonia's opposition to Franco, urban progressivism was part of its national identity. Generally, Catalans can accept that their nationalism is a matter of soil but prefer not to consider it a matter of blood. Or so it seems in Barcelona.

But like other polities dominated by one big, glamorous city, Catalonia is provincial practically everywhere else, and it is the countryside that is now the driving force of its nationalism. Ms. Orriols's electoral stronghold is in what journalists often call the "fuet corridor," after the dry sausage that mountain residents gnaw on. In Parliament, with her bootleg jeans and her Dr. Martens, a print top with a blazer thrown over it and a visible silver cross, she not only represents rural Catalonia; she embodies it.

She is blunt. "I will keep speaking clar i català, no matter how much they rebuke and fine me," she posted on Instagram — "clar i català" being the Catalan equivalent of "plain English." When I asked at the end of our interview whether there was anything that might help people understand her better, she replied, "Just this: The key to our electoral success is that we've

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Above and below, a Catalan Alliance booth featuring images of the party leader, **Sílvia Orriols, to attract sympathizers in Mataró, a coastal city north of Barcelona, late last month.**



OPINION

The New York Times

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The humble habit of successful people

Angela Duckworth

I was once stranded with my 86-year-old mother in the Atlantic Ocean. We were on a snorkeling excursion off the coast of Miami, and the two of us were quickly swept behind our boat, my mother overtaken by the current. In her panic, she'd inhaled water into both lungs and lost consciousness. Attempting to tug her to safety, I thrashed and kicked with all my might, but the ocean swallowed my efforts whole. Lungs burning, legs heavy, I changed tactics. I used one hand to keep her head above water and waved the other wildly in the air, shouting for help as I did.

Ultimately, what saved my mother's life that day, and mine, too, was not fighting the current on my own. It was calling for help. The rescuers who came to our aid knew more than I did about how to handle this kind of emergency. Together, they got my mom onto the boat deck, then to solid ground and finally into the hands of expert medical staff who could care for her properly.

Being a successful self-starter doesn't mean pulling yourself up by your bootstraps.

Most people understand the importance of asking for help in a life-or-death crisis. We know we should wave to the life-guard during a riptide or call 911 if our house catches fire. But in our personal and professional lives, Americans are encouraged to pursue rugged individualism over interdependency. "Help from without is often enfeebling in its effects. But help from within invariably invigorates," wrote the journalist Samuel Smiles in his 1859 book "Self-Help," which reached a wider audience in America than in his native Britain and spawned an entire literary genre of the same name. Heroic tales of self-made Americans abound — like Thomas Edison, who tested thousands of filaments in his quest to invent the light-bulb, or Steve Jobs, a loner who transformed technology.

You might think I'd love the image of the solo striver triumphing over every challenge. After all, I'm a psychologist who wrote a book called "Grit" about the necessity of passion and perseverance for achieving long-term goals. The truth is, I hate it. Without exception, every high performer I've studied credits a host of supporters for success. Research has found that a willingness to ask for help is crucial to achievement.

Consider Nicolai Tangen, the chief executive of the world's largest wealth fund. I interviewed him recently as he was putting the finishing touches on a book he'd been writing about leadership. After praising personal qualities like energy and grit, Mr. Tangen's book spills more ink than you can believe about his assistant, Grete Starheim. He trusts her to speak on his behalf, and he believes her when she tells him he's wrong. "Why should such important

people end up in the shadows?" Mr. Tangen asked. "Is it embarrassing to admit that you need help?"

Or consider Conan O'Brien, who told Harvard's graduating class that he always reminds himself that he'd done nothing alone. "If I could invite everybody, alive or dead, who has contributed to my being your commencement speaker today, all of Cambridge and half of Allston would be crammed shoulder to shoulder," he said.

Mr. Tangen and Mr. O'Brien aren't just being modest. Studies show that knowing when to ask for help is an essential skill for children's learning and achievement. College students who proactively seek assistance from others typically outperform those who avoid doing so. In adulthood, seeking support is an effective strategy for regulating our emotions, and having a support network is a reliable predictor of overall mental health.

Research also shows that entrepreneurs are more successful when brought together to learn from one another. That is why one venture capital firm, Y Combinator, favors funding co-founders over solo founders. It also links founders in what it calls batches, with group office hours, group dinners and an internal messaging platform for sharing knowledge. "Even if you could do all the work yourself, you need colleagues to brainstorm with, to talk you out of stupid decisions and to cheer you up when things go wrong," Paul Graham, one of Y Combinator's founders, once wrote.

From an early age, we suffer from what cognitive psychologists call the illusion of self-sufficiency, overlooking how much we owe our skills to other people. In one experiment, two groups of children were given a machine they'd never seen before. In the first, none managed to figure out how it worked on their own. In the second, the vast majority succeeded after seeing someone else use the machine and getting hints along the way. Still, after the experiment, 70 percent of the second group claimed they would have learned to use the machine without help.

Being a successful self-starter doesn't mean pulling yourself up by your bootstraps. It's raising your hand and asking a teacher to explain, once again, a concept you still don't understand. It's calling up a former boss for advice. It's announcing to your team that you're stuck on an important problem and need their collective brain to solve it. It's not just stoically making the best of a bad situation — it's proactively making your situation more supportive. Don't assume you're being a burden when you reach out asking for help. Research shows we consistently underestimate how happy it makes others to lend a hand.

"Do it yourself" is no way to live. Take it from my mom, who, five years after a cry for help saved her life, recently celebrated her 91st birthday.

ANGELA DUCKWORTH is a professor of psychology at the University of Pennsylvania and the author of the forthcoming book "Situated: Find the People and Places That Bring Out Your Best."



NYO JINYONGLIAN

Black English that found light

John McWhorter

It's easy to think that there was nothing vibrant about Black New York until the Harlem Renaissance came around.

A captivating new book sets us straight on that: "A Moment in the Sun: Black Manhattan Before the Civil War," by the historian Shane White (who is Australian, as it happens). He captures Black life in Manhattan from the 1820s through the 1850s, and pays particular attention to the copious court records of the period.

It was a brief, shining moment. After the 1850s, significant immigration from Europe reduced the Black population to only 1.5 in 100 New Yorkers, and the real estate crunch segregated Black people into poor, isolated neighborhoods. To be Black was to struggle for work with legions of foreign but white competitors, with anti-Black bigotry increasingly implacable.

Of course, even in the time White writes about, racism was deeply a part of Black life. Eligibility rules made it all but impossible for Black people to vote. An ever-looming threat, for one, was slave catchers trying to recover escaped slaves or even capture free Blacks. But to a Black person alive then, life was more than that, and the sheer and shining strut of the culture at the time should speak to us as well.

Slavery ended in 1827 in New York, and it became what White calls an "amalgamated city." Outsiders were often struck by the prominence of Black New Yorkers, who made up about 5 percent of the city at the time. Between white and Black, interaction was constant (and romances were hardly unheard-of). With the exception of Seneca Village, far uptown where today's Central Park is, Black people did not yet live in separate neighborhoods from white people. At a time when oysters were central to the American menu to an extent so counterintuitive today, over half of New York's oyster sellers were Black. Newly free Black people often tended toward the boisterous, refusing to make way for white people on the street any longer. Nightlife was on fire, with dressy, rambunctious balls and underground dance dives all about noise and courtship, often mixing white and Black.

On July 5 each year, Black people had a parade to celebrate their freedom, a day after the national independence celebration. To be a Black New Yorker meant knowing that every Sunday morning, you might gather with a big Black crowd at Catherine Market in Lower Manhattan to watch Black men developing tap dancing while competing for a good string of eels, and that after church you would join the grand



VARTIKA SHARMA

promenade on Broadway where le tout Black New York would amble about in resplendently colorful attire, regardless of social station.

"A Moment in the Sun" is a potato-chip book; I could barely put it down. This was indeed an early Harlem Renaissance — just less about the page, and happening without recording technology.

And as such, we can't hear New Yorkers of that era speak, which of course I was thinking about, especially as I have spent the summer doing some

A new book reveals some surprises about early 19th-century New York.

research on earlier Black English. The book gave me one of two swell findings I'd like to share.

Today, most Black New Yorkers have Black English as part of their speech repertoire. But Black

English was a Southern creation, and Black people brought it north during the Great Migration from the South starting in the 1910s. Before the Civil War, Black New Yorkers born there sounded pretty much like white people. White notes that an Englishwoman was surprised to hear that Black New York women "express themselves in good language, and with an enunciation, as bold and clear as any Englishman," as opposed to the minstrelse parodies of Black speech she had seen based on the

dialect in the South.

But then, this "bold and clear" — i.e., mainstream — speech that Black people used as well as white people was not what is familiar to us. As I have written here, the British accent we know now had only just come to exist in the 1820s, an ocean away from New York. Until around this time, Americans and Brits sounded pretty much the same. But vowels are always changing, and those of American English in 1820 were not quite ours.

Benjamin Franklin once proposed a new alphabet to indicate the sounds we actually make (there are 26 letters for about 43 sounds). Describing how words were pronounced, he accidentally gave us a listen into how he, and many Americans, actually spoke. What he describes is not the British accent we know today — but then, in some ways, not ours, either. One of the oddities is that where today we say "ah," what Franklin shows is that back then, they said something more like "aw." For "pot," not "paht," but more like "pawt." And this explains why Black women selling hot corn on New York streets in the 1820s were described as calling out "h-a-u-t corn." That is: "hawt." We would wonder just what accent this was — Caribbean? African? Nope — just ordinary Northeastern American in 1820.

Also, this summer I found proof of something about early Black English I have been chasing forever. In the 1930s,

So long, Harry and Meghan

GIVHAN, FROM PAGE 1

were creating such an intensely inward-facing life when they'd fled to California presumably in search of freedom and the ability to create themselves anew. They had the opportunity to see American celebrity culture up close. It's a culture fueled by the idea that a person's circumstances can always change. You can make your own luck. For royalty, change is verboten.

I remember when Meghan walked down the aisle at St. George's Chapel in 2018 wearing the sleek white Givenchy gown designed by Clare Waight Keller. The dress didn't evoke images of a fairy-tale princess, nor did it have the ostentatious drama of a gown destined for a Hollywood red carpet. With its bateau neckline and refusal of beads, ruffles and rhinestone, it was a dress that signaled a more straightforward, realistic vision of romance, marriage and, of course, the monarchy. I thought Meghan knew what she was getting into. I thought I knew. Like Meghan, I presumed the only difference between celebrity and royalty was degrees of notoriety.

"I thought, I grew up in L.A., you see celebrities all the time," she said during an infamous conversation with Oprah Winfrey in 2021. "This is not the same, right? But it's very easy, I think, especially as an American, to go, 'Oh, these are famous people.' It's like, no, this is a completely different ballgame."

In her new life, Meghan had observed nothing was quite like the suffocating, tradition-bound, highly visible role of a royal. Despite the financially lucrative shenanigans of Kardashians, Vanderpumps and Real Housewives, America's celebrity ecosystem is far superior to any royal court. It isn't exactly a meritocracy, but even our nepo babies have to prove their worth to command respect. Jack Schlossberg, the grandson of President John F. Kennedy, found this to be true when he solidly lost the Democratic primary to represent New York's 12th Congressional District. Bronny James had to show the skeptics that he belonged in the N.B.A. because of his talent and not just to satisfy basketball historians itching for a son to play alongside his legendary father, LeBron James.

Talent, experience, charisma and hard work count for something in America's



OLI SCARFF/AGENCE FRANCE PRESSE — GETTY IMAGES

celebrity culture. Those things mean nothing if you're royalty. The celebrities who are idolized and revered — rather than tolerated or hate-watched — are exceptional at what they do. In the days after the death of the great Dolly Parton, more than one mourner reached for aristocratic vocabulary to describe her universal appeal, her talent and her generosity. Describing Ms. Parton as American royalty flattens her unlikely life story into something that was pre-ordained rather than practically miraculous. Calling her royal distracts from her hard work and courage, the very things that made her such a wonder.

In that interview with Ms. Winfrey, Harry and Meghan unleashed accusations of racism in the royal family. Poor Harry seemed dumbfounded. The royal family had a fit of the vapors. And Meghan? I wondered how someone whose honey complexion, long hair and sprinkling of freckles had allowed her a bit of grace in a color-conscious culture digested a kind of blunt-force racism that was profane and antebellum. When to whom you are born is all that defines a royal family's stature and justifies its treasure, one drop of the wrong blood can befall the entire scheme. I imagined Meghan struggling to mourn the loss of a privilege that should never have existed.

So now I watch with a combination of

exasperation, confusion and even a bit of sadness as they return to England. Harry and Meghan have struggled to right-size their relationship with the royal family, with popular culture and with themselves. They have heaved flamethrowers at Prince William and Princess Kate. Their Netflix dabbblings have been less than impressive. Now, they are stuck in the in between. They are no longer fully royal. But they have little currency in the celebrity ecosystem.

What is Harry's talent? What gives his life meaning out in the world, separate from his family? Meghan had whiffs of a possible acting role in England in Guy Ritchie's "The Gentlemen," which is about attempts by a down-at-heel British aristocratic family to restore its fortunes by getting into the drug trade, but that seems to have evaporated. I hope she can find her way back to acting. Or realize her goal of becoming a lifestyle doyenne. Perhaps she can become a celebrity. A real A-lister. Harry could warm himself in her celebrity glow.

And he can finally feel what it's like to be better than — more than just — a royal.

ROBIN GIVHAN is a Pulitzer Prize-winning fashion critic and a former senior critic at large for The Washington Post.

writers under the Works Progress Administration were sent to interview ex-slaves. There survive hundreds of interview transcripts, and they are full of people using "am" not only with "I" but with "you," "he," "she," "we" and "they." You am; they am.

This usage of "am" was seized upon by minstrel performers as an indication of stupidity. Between this, the fact that seemingly no Black person is even depicted as using it after the 1920s and how plain bizarre it sounds today, experts on the dialect have supposed that no actual Black people used "am" this way, especially as none other than Zora Neale Hurston wrote that they didn't.

God bless Hurston, but I have noticed so much evidence that some Black people actually did use "am" that way that I have kept digging. One ex-slave recorded in 1940 gave us one peep of someone saying, "That sure am a pretty dress." But she was telling a story, performing. It could be that this was what linguists call ludic speech, only used in fictitious language, just as "Is You Is or Is You Ain't My Baby?" is a ludic take on how an actual Black man would address a woman.

An academic needs more, and I ran across it. We live for this sort of thing. You feel in your bones that something is true, but there is no explicit proof, and your fellow academics — appropriately — hold that against you until you have really brought the goods.

In the early 1800s, Anne Royall, a witty woman of Southern origin, traveled the country and described the speech patterns she had heard in each place. She recalled a Virginia lawyer saying, "I ar ready for trial." Then, "The opposite counsel, whom I believe was Mr. Wirt, rose up, and bowing, replied, 'Am you, Sir?'" Eureka! I knew of Royall's allusion from references to it, but had never bothered to read the actual thing.

And then there is a newsreel from 1929 of a white Southerner born in 1835, Rebecca Latimer Felton. This was someone who learned to speak when the president was Andrew Jackson. She was a politician (by formal appointment, briefly the first woman in the Senate), an ardent first-wave feminist and . . . a dedicated fan of slavery and lynching.

But honestly, she's hopelessly dead, and what I want to know is how she talked! And of all things, in the newsreel she says, casually, "Our boys am pleased to see ya."

Ah, the sense of release. Academia is about searching, revealing the counterintuitive and facing serious critique. It's what you sign up for, and it keeps you going.

JOHN MCWHORTER is an associate professor of linguistics at Columbia University.

Fighting globalism

CALDWELL, FROM PAGE 9

abandoned the political correctness they imposed on us and adopted the language of the people."

That language has raised alarms. In 2024, a foundation filed a hate-crime complaint against Ms. Orriols in Barcelona that cited her heated statements and the restrictions she imposed on municipal registration. Last year, in a parliamentary debate over a burkini ban that Ms. Orriols imposed on her town's public swimming pool, the president of Catalonia, Salvador Illa, accused her of practicing a "discourse of hate." In July, the Catalan Parliament reprimanded Ms. Orriols for having said that a veil-wearing member "normalizes misogyny and Islamic fundamentalism."

But the accusations of racism and intolerance routinely lobbed her way seem to have been dulled by overuse. Except as cynical attempts to shut her up, the words mean nothing to her. "This is not racism," she told Le Monde in the spring. "This is survival." And on Instagram recently, she posted, "The only 'extreme right' that threatens our rights, liberties and lives is Islam."

What truly discomfits more traditional Catalan nationalists, however, is not Ms. Orriols's radicalism; it's that her nationalism and her radicalism are inseparable. Immigration policies are the responsibility of Madrid, and she has stated unambiguously that her party has no interest in taking part in the Spanish government. So without independence, her hard-line anti-immigration posture is just idle talk. It makes sense only as part of what Catalan nationalism is becoming.

The nationalist torch was once carried by those who feared fascism. It's now carried by those who fear globalism. And not just in Catalonia.

CHRISTOPHER CALDWELL is a contributing editor at The Claremont Review of Books. He is the author of "Reflections on the Revolution in Europe: Immigration, Islam and the West" and "The Age of Entitlement: America Since the Sixties."

The FT View



FINANCIAL TIMES

"Without fear and without favour"

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Opinion Society

A real-world trial for work in the age of AI



Stephen Bush

Previous technological disruptions have destroyed "jobs". But they have not destroyed "work", because they have created at least as many employment opportunities as redundancies – in many cases, far more. Perhaps artificial intelligence will end up the same way. Or maybe not.

The remarkable leaps it is making may mean that even jobs we don't think of as at risk from AI may in fact also be in danger. If AI can accelerate the rate of advance in robotic research, occupations that we presently think of as "AI proof" may also soon be taken by machines.

One response – articulated last week by Bill Gates – is that we should have jobs that are "human reserved" and cannot be filled by robots. Another is that we should all trans-

The state pension is an essentially unconditional cash transfer – and a test of universal basic income

tion to a life of leisure, with our incomes provided through cash transfers and a universal basic income, or UBI.

People often talk as if UBI is largely untested, or confined to a handful of flawed trials. And it's true that most "universal basic income" trials are a lot like the Holy Roman Empire, which was neither holy, Roman nor an empire – they are neither universal, basic, nor, in some cases, an income.

There is, however, a real-world trial that has been running in countries across the developed world and tells us something about what a world with UBI would look like. It is called the state pension: an essentially unconditional cash transfer to retirement-age adults.

Let's set aside for a moment the fact that there are pensioners who, because they do not have enough to get by or do not have security of housing tenure, are forced to work. Such cases don't tell us very much. What's immediately striking when you look at state pension schemes is that the image often conjured up when we talk about UBI – of people sitting around enjoying the government's largesse – is mostly wrong. Take the UK, for instance, where many choose to work well beyond

pension age. A minority continue in paid occupations that they enjoy, and others might take up paid work as a way to meet people.

But when we expand our definition of "work" to include voluntary labour of the kind that we would otherwise have to pay someone to do – childcare or providing "social infrastructure" by running an apartment block's homeowners' association, serving as a magistrate, volunteering as a tour guide at a museum or a gallery – things look rather different.

Of those who don't do this, of course, some have delightful lives filled solely with leisure; they might go on long holidays, spend a lot of time at the cinema or concerts, read or play board games. But then there are those non-working pensioners who spend their time going down online rabbit holes becoming supporters of extreme ideologies of one kind or another.

What the state pension experience also shows, then, is that when voluntary work dries up, that takes a psychological toll just as the loss of paid work does.

This tells us something important: a near-generous welfare system might become an important part of ensuring that most of us have a decent standard of living in a world of AI and advanced robotics. Paid employment might dwindle significantly, but for most people some kind of "work" is going to be an important part of their sense of wellbeing. If my job is replaced by a machine, I will need to replace the lost income. But I will also need some work to do, whether it is paid or not.

It all comes with greater risks for the young, although those of us who are middle-aged or older are not immune to extreme ideologies, the young are more likely to turn to violent means in pursuit of them. That some pensioners turn to extreme politics in retirement is alarming enough – but as a gauge of what people at the start of their lives might do without work, it is actively worrying.

This is why Gates is right to advocate for some "human reserved" roles. Most of us who support minimum wages and some restrictions on the right of employers to fire at will know that these policies come with an economic cost. But we judge that the economic cost is worth the social benefit of a wage floor and some workplace restrictions.

Judging the right balance is the stuff that most politics is about. And so in the age of AI, much of politics will be about figuring out the balance between the economic benefit of letting a machine do the work and the social benefit that most of us gain from working.

stephen.bush@ft.com

Israel's de facto annexation of the West Bank

New housing tenders could end chance of a contiguous Palestinian state

Palestinian villagers are under siege, farmers cut off from their land. Almost daily Jewish settler violence drives more families from their homes. This has become the norm in the occupied West Bank over the past three years under Israeli Prime Minister Benjamin Netanyahu. Attacks have occurred with near impunity. The Israeli military, which as the occupying force is obliged to ensure public order, largely stands idly by or does not show up when attacks occur.

For the most part, Israel's western allies have been meek in efforts to stem the tide. Some European states, Australia, Canada and New Zealand imposed sanctions on two of Netanyahu's extremist ministers, Itamar Ben-Gvir and Bezalel Smotrich – both settlers – and some settler entities. It was too little, too late.

The consequences have been devastating. There have been more than 1,400 settler attacks this year, according to the UN, against a total of 1,836 for all of 2025 – which was the highest level since UN records began two decades ago. It is only getting worse as Netanyahu and his coalition partners seek to rally their bases ahead of elections in October. Rather than rein in the violence, they brag of their success in dramatically expanding settlements that are illegal under international law.

Last month, the government issued tenders for about 1,200 Jewish housing units in the territory's E1 area, which would further fragment the West Bank, cut the territory in two and could prove fatal to any hopes of a contiguous Palestinian state. The scheme was shelved by successive Israeli governments because it was so controversial. But Netanyahu and his supporters appear to be rushing to implement it, on the ground before Israelis go to the polls.

Netanyahu has for years worked to

prevent the establishment of a Palestinian state and expand Jewish settlements. But this accelerated dramatically after Hamas's October 7 2023 attack as the world's attention focused on the Gaza war. More than 1,000 Palestinians have been killed in the West Bank in the three years since as Israeli military raids and settler attacks intensified. More than 41,500 have been displaced over the past 18 months.

What was for years creeping has now become de facto annexation. Defence Minister Israel Katz last month ordered the army to prepare to transfer law-enforcement powers in the West Bank to the police. That would extend Israeli civilian administration over the Palestinian territory.

The catastrophe in Gaza, where more than 70,000 Palestinians have been killed, has drawn much international attention. But the disaster unfolding in the West Bank cannot be ignored. It has many legitimate security concerns, but its actions in the territory amount

Rather than rein in the violence, Netanyahu and his coalition partners brag of their success in dramatically expanding settlements that are illegal under international law

to land grabs in the service of ideology. Some governments are increasing pressure over the issue. The Netherlands is to ban imports from settlements; the UK is considering a similar embargo. Netanyahu's government responded by expelling Dutch representatives from the US-led co-ordination centre for postwar Gaza. That was further evidence of the need for Europe to stand up to Israel, particularly as US President Donald Trump says little heed to the West Bank crisis.

Western states should take a common stand on banning exports from settlements they deem illegal. Israeli entities involved in the construction or financing of settlements ought to face sanctions. EU members should unite to suspend the bloc's association agreement with Israel. Europeans also need to convince Trump that Netanyahu is acting against US and Israeli interests by destabilising the region. For the tens of thousands of Palestinians whose livelihoods have been destroyed it is already far too late.

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Letters

Global trade will have to box clever to achieve digital revolution

Alice Hancock and Peter Foster's report on how an "unregulated steel container" revolutionised global trade ("The steel box that built globalisation", The Big Read, August 20) bears a pertinent question: why, in 2026, have we not achieved the same revolution in digital trade?

Today, paper still serves as the bridge between multiple digital islands. Every day, billions of physical documents – bills of lading, certificates of origin and other trade documents – continue to

pass between exporters, shipping companies, ports, customs authorities, insurers, freight forwarders and banks.

There has been some progress. Electronic bills of lading are gaining acceptance, and more jurisdictions are adopting legislation based on the UN's Model Law on Electronic Transferable Records. But much of the industry assumes that paper will persist. As a result, considerable investment is still going into extracting data from documents to make paper

less painful, rather than unnecessary.

Hancock and Foster suggest that the efficiency gains from the container revolution may be plateauing – with real and significant consequences for global trade. A genuine digital trade revolution could unlock the next wave of productivity gains to drive growth in global trade. Unfortunately, technology alone will not deliver it.

The adoption of the 20x40ft shipping container 70 years ago transformed ports, cities and global

trade by requiring participants across multiple industries and geographies to set aside individual interests and invest behind a common global standard.

Perhaps the greatest lesson we can take is that the biggest gains came not from better boxes, but from everyone agreeing to use the same ones.

Industry leaders should now apply that lesson to data.

Vivek Ramachandran
Head of Global Trade Solutions at HSBC, London E14, UK

Bessent's defender wrote something different in 2024

Stephen Miran's defence of Treasury secretary Scott Bessent's recent short-deadline issuance as the "orthodox response to temporarily wider deficits" (August 28) heavily contradicts his own previous opinions.

In July 2024 Miran co-authored a paper with Nouriel Roubini introducing the term "activist Treasury issuance", criticising precisely this practice. It argued that Janet Yellen's Treasury was "usurping core functions of the Federal Reserve" by skewing debt towards bills. The authors estimated the effect as equivalent to a 100 basis points rate cut, and labelled it "stealth QE". Yet what Miran calls manipulation in 2024, he now lauds.

His justification is that today's deficits are temporary. This is a stretch: shortfalls are near 6 per cent of GDP at full employment. His assumption that tariff revenue will come to the rescue also assumes the tariff will be unassailable and will have no negative growth effects.

Miran also celebrates higher real yields as growth, but casually omits their impact on servicing a \$40tn debt.



Faster growth can only improve the fiscal position if it outpaces rising borrowing costs, and borrowing costs are rising precisely what many "commentators" he criticises are concerned about.

Khali Hegarty
Director, Ooley-Hegarty Melbourne, Australia

Is this Maga's Saturn phase – when it devours its own?

Amy Mackinnon describes the disparate factions of the American new right that have coalesced around Maga ("Why Maga came for Europe", August 19). As longtime students of revolution, we cannot help but wonder whether Maga has entered a familiar phase: the season of Saturn, when movements begin to devour their own.

The deportation of Milo Yiannopoulos by the very enforcement apparatus the rightwing commentator championed is a minor but revealing example. Movements that seek to purge universities and courts eventually purge their own.

Mark Bell
Head of Family Office Services and Private Equity, Goldman Sachs in the Americas, Harvard Business School (University of Oxford), Atlanta, GA, US
Max Bell (son)
High School Senior, The Westminster Schools, Atlanta, GA, US

A marketing riposte to saturation by social media

to Ellison's Life & Arts article (August 18) and others, I have noticed the observation that "social media shapes the way we experience everything".

It reminded me of a conversation I had with the owner of a boutique hotel on Folegandros who told me: "My collection isn't other boutique hotels, it's how the experience stacks up against what people have seen on Instagram." To not shout "loud and proud" about our products goes against everything we've been taught in marketing. But in an era where every experience comes with a trailer, maybe the real luxury is holding something back. The margins in the unexpected; we can all get a taste of it simply by putting our phones down.

Amelia van Veenendaal
Chief Executive, Add One, Amsterdam, The Netherlands

OPINION ON FT.COM
The first passive income-tracking fund
It was an infamously terrible, horrible, no good, very bad launch says Brian Wigglesworth
www.ft.com/alphaville

OUTLOOK LONDON

The enduring spirit of Notting Hill Carnival



by Marika Holdbrook-Smith
Damen

On May 17 1959, a 32-year-old Antiguan-born carpenter called Kelson Cochrane was attacked and killed by what media reports called "white youths" while walking home near Golborne Road in Notting Hill. His murder, which to this day has never been solved, led to Britain's first official inquiry into race relations. In west London, it resulted in a festival – a celebration of solidarity and anti-racism by the local Caribbean community that became Notting Hill Carnival.

This year marks the 60th anniversary of Carnival, the second-largest street carnival in the world after Rio's. What started as a small indoor event organised by Trinidadian activist Claudia Jones evolved into a parade in the mid-1960s led by social worker Rhane Laslett and is now an annual event with around 2mn attendees. For the final bank holiday weekend of August, the streets of west London are filled with what the organisers call the five m's: mas (short for masquerade), movement, music, mayhem and message.

Walk out of Westbourne Park tube station and you will be in prime position to see the parade. But as any seasoned attendee will tell you, it's best to keep an eye on the public safety, your way to Ladbroke Grove, listening to the soca, dancehall and reggae music booming from sound systems and smelling the air thick with the comforts of Caribbean cuisine. Stroll along Kensal Road on Sunday

morning and you'll see the vibrant children's parade. On Monday, the mas bands gather for the adult parade, the main event of Carnival.

The rhinestones and feathers of parade costumes are more than extravagant outfits; they are an art form rooted in resistance. Mas originates from a time when black enslaved Africans were excluded from plantation celebrations. To "play mas" became an opportunity to transform and keep up one's dignity, mocking the enslavers and celebrate freedom.

My family have been attending Carnival for over 40 years. My mother can remember her first experience attending with my uncle in the 1980s. For the Caribbean members of the family it offered a piece of home.

Over the years, it has grown beyond countries in the West Indies to include sound systems of West African heritage and Brazilian bands. Linett Kamala, who became one of the first women to DJ at Carnival in the mid-1980s, aged just 15, describes it as "an inherent part of British culture". The generation who started Carnival have now begun to pass the baton to the next – something that has led some attendees to wonder whether the event should also change. Last year, a report commissioned by the Mayor of London raised concerns, after which additional funding was provided by the councils of Kensington and Chelsea and Westminster. Earlier this year, the Mayor of London, Sadiq Khan, announced £4.66mn of extra funding,

much of which will be spent on crowd safety.

The scale of the festival – its high cost, the police presence required and the disruption caused to locals – has led some to suggest that it should become a ticketed event in order to keep the numbers down. But Allyson Williams, director of NHC, whose late husband Vernon "Fellows" Williams was a founder member of the Carnival, says no. "Having a ticketed event is out of the question." The premise of Carnival, she says, was to make it accessible to all. The mayor has also highlighted its annual economic contribution to the city as almost £400mn.

Organisers want to do more to acknowledge Carnival's origins as a joyful form of resistance to racism. The streets that Cochrane walked through on the night he died were the scene of the Notting Hill race riots a year earlier, in which the area's black minority community was targeted in a series of racially motivated attacks.

Anel Wong, a Trinidadian-British political activist and one of the directors of NHC, tells me that as time goes on, this connection becomes more important.

"I think it is essential that we look at Carnival as testament to the enduring spirit of resistance to racism, like to see [it] ... continue to make that transformation, coming from our younger generations. The future is with them."

marika.holdbrooksmithdamen@ft.com

Opinion

The Meta settlement is regulation by enforcement

BUSINESS
Brooke Masters

Last week, social media group Meta, facing the prospect of putting chief executive Mark Zuckerberg on the stand to testify about its efforts to hook young Instagram users, opted to cut a deal.

The company settled claims it had addicted and endangered children by agreeing to pay a total of up to \$18bn to 48 states and Washington DC. It will also impose default daily limits and nighttime blocks for teenagers. The penalties are among the largest ever paid by a single company, though far short of the \$1.4tn the states were seeking.

What made the deal unusual was that \$5bn of the money, and the tightest restrictions – a one-hour daily limit – will come into play only if the states

strike similar agreements with Instagram's biggest rivals, including TikTok and YouTube. Both sides are essentially betting they can shame the wider social media industry into accepting nationwide curbs on young social media use.

Meta, which had already lost a trial in New Mexico and owes that state nearly \$1bn, wants a wider deal lest it end up as the only company officially tagged with being a "public nuisance". The extra penalty money is dwarfed by Meta's \$1.5tn market cap, and it can live with one-hour usage limits as long as others face them too. Polling suggests teenagers only use Instagram one hour a day, versus 1.5 or two for its rivals.

The state attorneys-general who brought the case are explicit about their bipartisan goals. Democrat Phil Weiser of Colorado boasted that "the settlement with Meta could set the standard for the industry" and Republican Chris Carr of Georgia warned, "while Meta is the first to come to the table, they shouldn't be the last."

If this sounds like regulation by enforcement, it's because it is. It will come in five Americans support tighter social

controls in general and two-thirds want mandatory age verification. But Congress and the Trump administration have proved reluctant or unable to do anything at all to limit social media use.

So the state AGs, many of them elected officials, have responded to public demand. They cannot write regulations, but they can bring legal cases and seek settlements that include new rules, like Side Spitzer's critics, some opponents call the current Meta deal a misguided use of state enforcement power. They argue state AGs should leave policymaking to federal regulators and the legislature. In this view, state politicians and a single company saddled with embarrassing emails should not set national policy, and the rules that result are problematic because they have not been tested in a public process.

"State AGs are not the best decision makers for the internet. They don't see the national picture," says Eric Goldman, a Santa Clara University law professor. There is "no science backing that two-hour limits are right... They've completely made it up."

Even if I like me, you believe that governments should be doing more to protect young people from social media ills, it is hard to argue that multi-state settlements are the ideal route.

The Meta talks started months ago and reached a deal only after the trial started. The company told me that one of the biggest challenges was dealing with dozens of AGs and added that they were happy to get 48 on board.

Even that success papers over the fact that Texas refused to join the other 47 and struck a separate \$1bn deal, and Meta's legal troubles are not over. Florida's AG called the payout "peanuts" and vowed to go to trial. The company is also appealing its New Mexico loss.

In financial services in the 2000s, the path to a national resolution included the US Securities and Exchange Commission. The SEC brought its regulatory experience to the table and helped ensure that the new strictures on analysts would apply nationally.

Now that social media companies are facing regulation by piecemeal state enforcement, they should rethink their views on national rules.

brooke.masters@ft.com

Both sides are betting they can shame the wider social media industry into accepting nationwide curbs

and working as a group they can try to force nationwide change.

"My 100,000-ft view is that this is a success at actual governance. It will not be the last," says James Tierney, a former Maine AG who now teaches courses on the role of state AGs in the federal system. "We're going to see this in other industries and other fields."

We already have in financial services,

Trump's tariff fix leaves US trade policy in permanent flux

Kari Heerman

Worsening trade tensions between the US and Canada have diverted attention away from the debate about the Trump administration's use of Section 301 of the Trade Act of 1974 to reshape the US tariff schedule. Many have asked whether it can legally do so. But a different question needs to be considered: what kind of trade policy results when Section 301 becomes the foundation of the tariff regime?

The answer lies in the statute's basic logic. Section 301 empowers the US Trade Representative to investigate and respond to specific foreign trading practices judged to be unfair. Tariffs are supposed to be a remedy. They are not supposed to be the objective.

A tariff regime based on Section 301 ensures future administrations will repeatedly revisit not only the tariffs but the purpose they are meant to serve. Congress constructed the legislation so that Section 301 actions terminate after four years, unless a beneficiary requests continuation; if one does, then USTR conducts a review of the action. This means successive administrations cannot simply leave tariffs untouched or quietly allow them to lapse.

At that four-year point, an administration may want to preserve elements of the tariff structure supported by Section 301, which has largely replaced the "liberation day" tariffs. If that includes tariffs on the EU, Japan or other allies, it will have to decide whether it is willing to stand by findings that these countries are engaged in actionable unfair trade practices. In fact, it may be tempted to construct a new Section 301 investigation into different alleged unfair trading practices. In another four years, the next administration would face the same choice.

That may be the right design for an enforcement tool aimed at specific unfair practices. But it is a peculiar choice for the basic architecture of US trade policy. Build a tariff regime on these foundations, and the result is a structurally unsettled trade policy.

For some, the flexibility to revisit the tariff regime may seem useful. But it has a cost. Every four-year review creates another opportunity for industries to seek protection and for political bargaining over who receives it.

That uncertainty also undercuts one of the central arguments for tariffs, the idea that they will encourage investment in domestic production, strengthen supply chains and reduce economic vulnerabilities. If tariffs are meant to influence decade-long decisions, today's rate is only part of the equation. Companies with money on the line need the policy framework to remain stable for those decisions to pay off.

A structurally unsettled trade policy also makes it harder for the US to persuade other countries to organise around its strategic priorities.

Whether the objective is building critical minerals supply chains or encouraging the development of new technologies, success depends on partners believing US trade policy won't later be reconstructed in ways that compromise their efforts to do the same. But trading partners should not simply conclude the US has become unreliable. They have a stake in helping build a co-operative alternative to the cycle of unilateral executive action.

Many in Washington, both Democrats and Republicans, believe the US needs a fundamentally different approach to trade in an era of rising geopolitical tension and rapidly changing technology. That debate is worth having, in the US and among its partners. Section 301 can't answer that question. A tariff regime built on Section 301, a statute that is repeatedly revisited through successive investigations and reviews, suggests that debate rather than resolving it.

The real question is not whether Section 301 can support a new tariff regime. It is whether the US is prepared to decide what that regime is for.

Use of Section 301 means future administrations cannot allow levies to lapse or leave them untouched

Whose fiscal problems would you prefer?

ECONOMICS
Robin Harding

You are the chair of a bank's credit committee and the following three loans have come before you. To whom would you rather lend?

Loan one is to a successful entrepreneur who seems to have gone off the rails, spending like wild on parties and drugs, and in need of ever more cash to keep the lifestyle going. Borrower two is in business, elderly but reputable. They have vast existing debts and profligate spending plans, but lots of assets and a reputation for hard work. The question is where their future income will come from.

Loan three is to an aristocrat who lives in a grand estate, but whose income is falling. Their existing debts are heavy, and between the school fees, the horses and the cost of fixing the roof, their commitments are too. The house looks nice, but the rooms are bare, and the owner's earning prospects look dubious.

These three borrowers represent the choice confronting investors as they look around the world at the dismal fiscal state of the world's developed economies. There is the US – candidate one – running a near 6 per cent of GDP deficit for no good reason except that taxes are

un-American, with no plan and seemingly no desire ever to do anything about it.

Then there is Japan – candidate two – which has a massive public debt, an ageing population and has made the odd decision to carry on with deficit spending even after fixing its problem with deflation. Japan is asset rich, however, both its government and its people.

Finally there is Europe – candidate three – where big debtors include countries such as France, Italy and the UK. In Europe there is at least rhetorical attention to the control of debt and deficits, but many nations have made lavish spending promises, which their economies are increasingly ill-equipped to support, and which they will have to live with to confront voters with that harsh reality.

As bond yields tick upwards, with 30-year yields exceeding 4 per cent in Japan and 5 per cent in the US and UK, the fiscal pressure on every indebted economy is mounting.

Each country bemoans its own fiscal problems and the profligacy of the politicians who caused them. All have been marked by large increases in public debt since the 2008 financial crisis, and since Covid in particular. But despite the surface similarities, the nature of the fiscal challenge in each country's defence industry, and some would be notably easier to solve than others.

The US, for example, now has net public debt of about 99 per cent of annual output, according to the IMF.



That figure is projected to keep rising fast because of a large and unaddressed fiscal deficit. But the US has that deficit largely by choice: it has chosen to cut taxes repeatedly without cutting spending. It has robust economic growth, which makes debt much easier to tackle, since you can raise income without raising taxes. There is also a global appetite to hold US Treasuries. If the political system ever gets its act together – if the entrepreneur ever gets tired of the binge – then its fiscal problems are quite solvable.

Japan's public debt, which has been large for a long time, is often thought of as a global outlier. But on a net basis, projected to be 134 per cent of GDP in 2026 according to the IMF, it no longer looks so vastly different from the levels

Each country bemoans its own problems and the profligacy of the politicians who caused them

of other rich countries. The most difficult part of Japan's fiscal problem is its relentless ageing, with the costs of healthcare and pensions rising every year and a dwindling working-age population to pay for them.

It currently has a good window to tackle its problem. The rate of inflation is eroding the stock of debt borrowed when interest rates were zero. Prime Minister Sanae Takaichi seems determined to waste the opportunity with an unnecessary spending splurge, but this is at least discretionary spending rather than welfare handouts. Japan's great strength, meanwhile, is its position as a large creditor to the rest of the world. Its people have a lot of savings even if their government has a lot of debt. It is not dependent on the kindness of strangers.

That leaves Europe, and countries such as France, whose net debt is 108 per cent of annual output on the IMF's October 2025 measure, Italy, where it is 128 per cent, and the UK where it is just over 94 per cent. All of these countries have persistent fiscal deficits they

have struggled to bring under control since the pandemic. There is little growth, tax burdens are high and most welfare states are locked into an expensive welfare state, which their citizens are unwilling to give up.

The UK, which has a persistent current account deficit as well as its fiscal deficit, and a threadbare public sector, having sold off almost every asset that was not nailed down, looks especially short of options. Europe's problem is fundamentally one of spending, and unless there is a sudden revival of growth, it can only really be solved by persuading populations that they are poorer than they think they are – a thankless task for any politician.

Fiscal outlooks are dire in many countries, and for the first time in decades, markets are starting to press the issue. But some are more solvable than others.

As every banker knows: better a borrower who will not pay than one who cannot.

robin.harding@ft.com

Don't write off Russia's defence industry yet

Maria Snegovaya

Despite Ukraine's recent battlefield successes, it is far too early to write off Russia, which is rebuilding its military in ways that many in the west have underestimated. Instead of simply replacing battlefield losses, it is creating a defence industry that combines Soviet-era industrial capacity with the demands of 21st-century warfare. The goal is not just to produce more tanks, but to reshape its military around the "asymmetric" advantages revealed by the war in Ukraine: drones, compact electronic warfare systems and other low-cost technologies that can be fielded at scale.

The long-term challenge may be even greater for Europe than for Ukraine, whose military has spent more than a decade adapting to old Russian tactics and capabilities.

Russia's hybrid state-market model now combines the Soviet system's capacity for industrial mobilisation with the flexibility of market competition. Russia inherited a vast infrastructure that enables it to scale production of selected weapons and systems much faster than most western defence industries. Since 2022, Russia has continued expanding its defence base: satellite imagery shows construction at production sites for state-backed conglomerates like Kalashnikov and Almaz-Antey.

Today's system selectively incorporates market incentives, private companies and decentralised innovation. A good example is the Ushkynyk, a technology accelerator that bridges domestic start-up and technical volunteer efforts with larger defence-industrial enterprises and the state acquisition system. This set-up enables small-scale efforts that would normally remain outside the ministry's orbit to respond to frontline needs. This model also makes sanctions evasion easier. Instead of solely relying on state procurement, private firms and intermediary networks employ shell companies, third-country

distributors and e-commerce platforms such as Alibaba to buy dual-use western components while circumventing export controls.

Contrary to expectations, Soviet-era defence giants have proved adaptable, prioritising scalable, low-cost capabilities – such as drones and compact electronic warfare. Legacy manufacturers are increasingly investing in unmanned systems, AI-enabled targeting and autonomous technologies. Kalashnikov's partnerships with grassroots initiatives such as Ushkynyk and Project Archangel illustrate how wartime innovation is consolidated under major state defence contractors. Russia's Geran long-range drones have evolved from the original Iranian propeller-driven design to jet-powered versions, as well

War has created a feedback loop between the front lines and factories

as new variants operating on mesh networks (a self-organising wireless network allowing drones to communicate directly and relay data through one another). Electronic warfare has undergone a similar transformation: rather than relying on large, strategic systems, Russia has started fielding thousands of compact counter-drone systems to jam communications and disrupt navigation.

As a result, drone production has expanded dramatically. In 2026, Kalashnikov plans to produce 7,300 first-person view drones in 2026 and reportedly delivered more than 130,000 low-cost electronic warfare systems in 2025. Monthly production of Gerans alone is vastly exceeding America's current deployment of the Lucas loitering munition, itself a reverse-engineered version of the Iranian Shahab-3.

Finally, war has created a feedback loop between the front lines and factories, allowing Russian companies to test and field new systems rapidly. These systems are generating international interest. Russian companies have marketed combat-proven equipment at

international arms exhibitions, leading to export deals. In 2026, Kalashnikov signed an agreement to supply civilian UAVs to an Indian partner. This demand is likely to grow.

Combined with a force of roughly 700,000 currently deployed in Ukraine, these capabilities could offer important advantages in a future conflict with Nato, especially if Russia's defence-industrial base remains on a wartime footing, allowing it to replenish equipment and expand capacity faster than most western countries.

Moscow could then seek to offset western technological advantages through attrition, extensive drone warfare and disruption of communications through electronic warfare. While Russia has spent years adapting to counter western weapons and tactics on the battlefield, Nato has had far fewer opportunities to develop comparable experience. It is time to start closing that gap.

Samuel Benedict contributed to this article

The writer is a senior fellow at the Center for Strategic and International Studies

The writer is senior fellow and director of the Brookings Institution