Small fish

While carriers of narcotics are caught in the net, big sharks operate freely

Operation Trident, a multi-agency crackdown on an international syndicate operating across the India-Myanmar-Bangladesh corridor, marks a significant step-up in the government's campaign against drug trafficking. The Union Home Minister, Amit Shah, has set December 31, 2029, as the deadline to eradicate drug networks across the country. The October 23 raids, which led to 18 people being arrested, were based on NCB investigations following the arrest of an alleged Myanmar-based kingpin in Delhi this May. However, the dismantling of the entire network would require identification of all suppliers in Myanmar and their successful prosecution. The government's strategy, involving States and Union Territories, over 40 Ministries, central agencies and the pharmaceutical sector, is outlined in the Vision Document on Drug Control (2026-2029), launched by Mr. Shah at the Narco-Coordination Centre meeting on June 26, 2026. It envisages dismantling 100 major cartels and improving prosecution outcomes. The broad strategy reflects the complexity of the problem and signals a more focused approach. Data for 2025 also show an increase of over 50% in arrests and a nearly 53% rise in cases registered under the Narcotic Drugs and Psychotropic Substances (NDPS) Act compared with 2024.

However, the government's action-plan will depend on consistent implementation and efficient coordination among agencies, and striking at the real brains behind it all. In several cases, foreign-based key operatives still remain at large and big sharks often do not fall in the net. The 2021 Mundra port case in Gujarat, involving the seizure of about 3,000 kg of heroin, is a case in point wherein the principal Afghanistan-based suppliers have yet to be brought to book. Also, the quantity of drugs seized does not, by itself, indicate whether drug availability or consumption has declined. Punjab remains a prominent example of the continuing public health challenges associated with drug abuse. The alleged drug-related killings of anti-drug activists in Mansa and Gurdaspur, along with the alleged death by suicide of a father in Sangrur who had raised concerns about the easy availability of synthetic drugs in his locality, underscore the human cost of the problem. These incidents also raise questions about the protection of those who speak out against drug trafficking and networks. These concerns lend urgency to the objective of dismantling entire networks and apprehending the "big sharks", rather than concentrating disproportionately on individual carriers. The key is to identify the ultimate beneficiaries by meticulously following the money trail and ensuring their conviction.

Fouled waters

River pollution from industrial effluents indicates state failure

The Supreme Court has pulled up, once again, the Rajasthan government over industrial effluents flowing into the Jojari river and the deadly risk it poses for the people depending on it. The problem is decades old – public interest litigation in the Rajasthan High Court alerted State machinery to the problem in 2011 – indicating an oversight by the State bordering on the systematic. The Jojari, the Luni, and the Bandi are seasonal rivers in the State's arid western region, flowing through Jodhpur, Balotra, and Pali districts. This region has also evolved as a textile-dyeing and steelworking hub, and untreated or insufficiently treated effluents from these factories have run directly into the rivers and soil, endangering the health of around 20 lakh local residents. The region also suffers rampant illegal sand mining in riverbeds. The sewage treatment plants have been able to accommodate only around half of the sewage generated in the three urban centres, according to the State's submissions to the Court in 2025, even as the Court recorded substantial underutilisation at common effluent treatment plants. The combination is suggestive of industrial sources bypassing treatment facilities, poor connections between the sources and the facilities, and/or insufficient capacity at particular sites or in specific periods.

The Court initiated a *suo motu* writ petition in 2025 and constituted a High-level Ecosystem Oversight Committee chaired by Justice Sangeet Lodha to audit the plants and draft a plan to restore the rivers. Based on the committee's scathing status reports, Justices Vikram Nath and Sandeep Mehta banned construction within 100 metres of the rivers' edges and hazardous industries within 500 m of the present path, or of the flood lines where available. The Court has also upbraided local authorities for failing to enforce pollution norms by citing the Court's own stay of a 2022 National Green Tribunal order imposing a compensation on the Rajasthan State Industrial Development and Investment Corporation and the local administration in Jodhpur and Barmer. The State regulatory apparatus has been dysfunctional: officials were aware of illegal mining operations in some areas, yet they regularised leases in those areas. Given the dereliction in play, the Court is correct to treat the possibility of collusion between State officials and industrial mafias seriously. Justice Mehta's observation that the State could be held liable under the 'polluter pays' principle is also a significant indictment of state failure, through negligence. Now, importantly, the State still has to restore the Jojari and attend to its wellbeing, which is relevant to a recent tendency by the Court to substitute itself for regulators rather than disciplining them into discharging their functions. This needs to change.

New Delhi's 'balancing act' risks eroding Russia's trust



Muqtedar Khan

Professor of International Relations at the University of Delaware and a Senior Non-Resident Fellow of the Middle East Policy Council. He hosts a YouTube show on World Affairs called 'Khanversations'

The Shanghai Cooperation Organisation (SCO) summit in Bishkek, Kyrgyzstan, on August 31-September 1, 2026, and the BRICS summit in New Delhi on September 12-13, 2026, were remarkable. Iran received considerably more attention and support from members of both the groups, far more than anticipated. More consequential, however, was the shift in India's stance on the United States-Israel war against Iran and Russia's war in Ukraine.

Traditionally, the SCO and BRICS summits have offered the three major powers – Russia, India and China – an opportunity to demonstrate their mutual solidarity. For Russia, it is a platform from which it can signal to the West that it is not isolated and still has powerful allies. The expansion of the SCO and BRICS under China's leadership showcases its growing power to the West. For India, the SCO and BRICS have been useful for demonstrating its strategic autonomy. India has sought to remain welcome in both western and non-western forums, from the G-7 to the SCO and BRICS.

A surprise pivot

At Bishkek, however, India sprang two surprises. First, it endorsed the Bishkek Declaration, which condemned the attacks on Iran as violations of international law, reaffirmed Iran's sovereignty and territorial integrity, and mourned the killing of its Supreme Leader, Ayatollah Ali Khamenei, in U.S.-Israeli air strikes on February 28, 2026.

Although the declaration did not name the U.S. or Israel, its meaning was unmistakable. India reaffirmed its opposition to military strikes on Iran by endorsing the Bishkek Declaration, which condemned the attacks and reiterated support for Iran's sovereignty and territorial integrity. Second, Prime Minister Narendra Modi made an unusually blunt appeal to Russian President Vladimir Putin to bring Russia's seemingly endless war in Ukraine to an end.

India has generally sought to avoid directly condemning the U.S. or Israel for their military actions against Iran, even though Iran, like India, is a member of both the SCO and BRICS. India had previously avoided explicitly accusing Israel of genocide in Gaza, although it had supported UN resolutions calling for a ceasefire and reaffirmed its commitment to Palestinian statehood. Indeed, New Delhi had emphatically declared that it stands with Israel, while often working in multilateral forums to soften language that is critical of Washington and Tel Aviv. But in both the Bishkek and Delhi Declarations, India signed on to very strong criticism of Israel as well as very strong affirmation of Palestinian rights and the two-state solution.

> India's performative diplomacy could undermine its longstanding friendship with Moscow

One interpretation of this pivot in policy is that India may have signed on to the declaration to avoid alienating Mr. Putin and Chinese President Xi Jinping, and thereby jeopardising their attendance at India's BRICS summit. Without the two leaders, India's presidency of BRICS this year would have been a complete failure. Since Operation Sindoor (2025), India has faced a growing perception of diplomatic marginalisation. Meanwhile, Pakistan has gained diplomatic prominence through Washington's selection of Islamabad as a mediator in the conflict with Iran, while several Gulf nations have sought defence agreements with Pakistan. Consequently, India needed a successful and high-profile BRICS summit, which it got.

Contradictory shifts

While there is a shift in India's policy, New Delhi has not abandoned Washington entirely. Mr. Modi's public appeal to Mr. Putin to end the endless war in Ukraine can therefore be read as a counter-signal to Washington. Had the message been intended only for Moscow, it could have been conveyed privately. Delivering it publicly suggested that Mr. Modi was also reassuring the West. India may have joined the SCO and BRICS consensus on Iran to secure a successful BRICS summit, but it was now leaning more toward the western position on Ukraine than before.

These apparently contradictory shifts reveal the strain on India's foreign policy. New Delhi wants to support Israel while condemning attacks on Iran; buy Russian oil while aligning more closely with the West on Ukraine; and remain central to BRICS and the SCO while assuring Washington that it is not part of an anti-American bloc. Multi-alignment is becoming an increasingly difficult exercise in this era of change and turbulence. India's balancing act is unlikely to sit comfortably with either Moscow or Beijing.

Although Mr. Modi and Mr. Xi did not meet bilaterally at the SCO summit in Bishkek, they held talks on the sidelines of the BRICS summit in New Delhi. The meeting preceded Mr. Xi's high-profile G2 summit with U.S. President Donald Trump in Washington, which was held in September 2026. Neither summit declaration mentioned the war in Ukraine, avoiding criticism of Moscow even as Mr. Modi publicly urged Mr. Putin to end the conflict. India thus endorsed two declarations accommodating Russia's position without fully embracing it.

From Mr. Putin's perspective, this was the second time that Mr. Modi had used what might be called '*jumla*' (performative) diplomacy at Russia's expense. At Samarkand on September 16, 2022, Mr. Modi told Mr. Putin that "today's era is not an era of war". External Affairs Minister S. Jaishankar subsequently repeated that phrase in western capitals to demonstrate that India's purchase of discounted Russian oil did not signify political support for Russia's invasion.

The selectivity of these admonitions is difficult to ignore. Mr. Modi has not used comparable language toward Mr. Netanyahu, even as Israel has attacked several countries and territories across West Asia, many on multiple occasions, and has committed genocide in Gaza. Nor has Mr. Modi publicly directed the same admonition at Mr. Trump following American attacks on Iran. India itself attacked Pakistan during Operation Sindoor. Mr. Putin may therefore conclude that Mr. Modi's declaration that this is "not an era of war" reflects neither a consistent principle nor a universal opposition to war, but diplomatic messaging designed to reassure the West at Russia's expense.

Mr. Modi's latest appeal – that "endless war" must give way to an "end of war" – may reinforce that perception. Would Mr. Modi deliver the same message to Mr. Trump about the increasingly prolonged war with Iran – or to Mr. Netanyahu about his unending campaign of revenge in Gaza? How is Moscow interpreting this double standard?

Where ties with Russia stand

Russia, nevertheless, still needs India, at least for now, as a major purchaser of its oil and military equipment. At the same time, Moscow can see that New Delhi has steadily reduced its dependence on Russian arms by turning increasingly to France, Israel, and the U.S. The relationship remains important to both countries, but it is becoming increasingly transactional – and vulnerable to their diverging strategic priorities.

Russia is now leaning ever more toward its "trusted partner" – China, while Mr. Modi's performative diplomacy designed to stay in the good books of Washington risks undermining the long enduring Russia-India friendship.

India's next investment cycle will shape its carbon future



Amarendu Nandy

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The United Nations Environment Programme's (UNEP) recent warning that the world could cross the 1.5°C warming threshold within the next few years is likely to renew calls for faster decarbonisation. India, too, will face this pressure, but its choices are still open. Much of the housing, industrial infrastructure, power networks and urban development needed for its next phase of growth is yet to be built.

NITI Aayog estimates that 86% of the building stock that India will have in 2070 is yet to be built. Total floor space will more than double, from about 18 billion square metres in 2020 to 42 billion by 2070. India's crude-steel capacity, at about 200 million tonnes in 2024-25, is targeted to reach 300 million tonnes by 2030-31. Cement output is projected to rise from about 427 million tonnes in 2024 to 660 million tonnes by 2030.

The advantage of choice

The usual reading of these numbers is that India's infrastructure deficit makes decarbonisation harder. Demand for steel, cement and electricity will continue to rise even as India tries to reduce emissions. True, but only partly. The other side of the development deficit is that much of India's future capital stock remains a choice rather than an inheritance. Its future emissions will depend on what it chooses to build now and the technologies and standards that are embedded in that investment.

Mature economies face the opposite problem. The International Energy Agency (IEA) estimates that around 80% of the building stock that advanced economies will use in 2050 already exists. In the European Union, 85% of buildings predate 2000, around three-quarters perform poorly in terms of energy efficiency, and only about 1% are renovated each year. India has legacy problems too, but has more room to avoid creating them. It can build in efficiency from the outset and reduce the risks of stranded assets, premature retirements, or expensive retrofits later. In buildings, India need not wait for technology to catch up. The know-how is there, and so is the regulatory framework. The gap is in implementation.

> Its future emissions will depend on what it chooses to build now and the technologies and standards incorporated into those investments

The Bureau of Energy Efficiency (BEE)'s State Energy Efficiency Index reports that the Energy Conservation Building Code (ECBC) 2017 has been notified by 27 States, but legally incorporated in only 21. BEE has since issued the Energy Conservation and Sustainable Building Code (ECSBC) 2024 for commercial and office buildings and the Eco-Niwas Samhita (ENS) 2024 for residential buildings. States should embed these standards in building permits, occupancy certificates, and grid connections, where non-compliance can carry a cost.

The issue in the power sector

Power presents a different problem. India has added renewable generation quickly, but the network to move it has not kept pace. The IEA estimates that transmission bottlenecks have held back around 60 GW of renewable capacity. The Ministry of Power's plan envisages roughly 590 GW of generation additions between 2023 and 2032. So, an unresolved transmission gap will become more serious as generation expands. As transport, cooling and parts of industry electrify, the gains from cleaner generation will depend on whether that power can be reliably moved to where it is needed. Transmission and storage, therefore, must be planned alongside, and in some cases ahead of, new generation and demand.

In steel and cement, the low-carbon transition is harder. The Ministry of Steel acknowledges that hydrogen-based green steel is not yet viable in India, while NITI Aayog places large-scale carbon capture in cement further down the transition path. Mandating technologies could raise costs and, worse, lock firms into processes that later prove uneconomic.

Public procurement could be a better instrument. The Union and State governments, Indian Railways, the National Highways Authority of India, and other public agencies buy large quantities of steel and cement and can help create an early market for lower-emission materials.

India already has a green-steel taxonomy, and the Ministry of Steel has proposed aggregated procurement through competitive bidding. Tenders could set emissions-intensity thresholds without prescribing the production route. Competitive bidding would then reveal the green premium while rewarding producers who find the most efficient ways to meet the thresholds. As the premium narrows with economies of scale and technological advances, the thresholds could be tightened. They could also be aligned with the emissions-intensity targets under the Carbon Credit Trading Scheme (CCTS), ensuring consistent policy signals.

Costs and risks

Finance can also skew these choices. The IEA estimates that India's cost of capital for grid-scale renewables is about 80% higher than in advanced economies. Since clean infrastructure is front-loaded in cost, that gap can make an otherwise viable project uneconomic. Targeted instruments such as payment-security mechanisms, partial credit guarantees, or concessional debt can ease financing or off-taker risk. But where the technology is still unproven, cheaper public finance will simply shift more risk onto the public balance sheet.

India cannot avoid the investment required to build the economy it still needs. What matters is what kind of capital the investment leaves behind. Where technology is mature, there is little reason to build inefficiency into assets that will last for decades. Where it is still evolving, preserving flexibility has value. Getting those choices right now can spare the country costlier corrections later.

The views expressed are personal

LETTERS TO THE EDITOR

Brazil's choice

Luiz Inácio Lula da Silva's victory in Brazil's election highlights both democracy's resilience and the formidable challenges facing elected leaders (Page 1, October 27). Democracies cannot afford endless ideological battles between the right and the left while citizens struggle for employment, affordable health care and peace. Regardless of who governs, statesmanship demands confronting global economic realities rather than exploiting public anxieties for electoral gains. Victory at the ballot box is merely the beginning. Delivering dignity, security and opportunity is the true test of leadership. Political parties worldwide must introspect.

Brij B. Goyal,
Ludhiana, Punjab

The headwind turned tailwind win of Luiz Inácio Lula da Silva is a sure sign of the sturdy will of people wedded to democracy to quell the right-wing wave in South America. It is also a strong sign that the wind is blowing against the machinations of U.S. President Donald Trump in South America. Overall, the wins in Brazil and Serbia are signs of change globally.

Ayyasseri Raveendranath,
Aranmula, Keralam

Vanishing paddy fields

The debate over the decline of Keralam's paddy fields must go beyond blaming the restrictive provisions of the Kerala Conservation of Paddy Land and Wetland Act, 2008, or the bureaucracy implementing it. The large-scale conversion of agricultural land has been driven by rising land values, urbanisation, changing employment patterns and the declining viability of traditional paddy cultivation.

The State cannot escape responsibility.

Restrictions on land conversion should have been accompanied by measures to make cultivation economically sustainable and protect wetlands. Rising labour costs, fragmented holdings, labour shortages and increasing demand for housing have made paddy farming less attractive. A meaningful assessment must examine the policies that permitted land conversion, who benefited and what measures were taken to protect food security, biodiversity, groundwater recharge and flood regulation. Keralam needs a balanced policy that protects farmers' livelihoods and the environment while accommodating legitimate development needs.

T. Ravindranthan,
Chennai

Fragile hill ecosystems

It is deeply shocking that the pristine Nilgiris district continues to bear the brunt of nature's fury during every monsoon (October 26 and October 27). The loss of greenery, the felling of trees and an indiscriminate construction of commercial complexes, resorts and lodging houses continue unabated, aided by faulty administrative policies and vested interests. Tourism must not be promoted at the cost of environmental destruction.

V. Johan Dhanakumar,
Chennai

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

The SIR and its error margin



Nishtha Gupta

Technology policy researcher based in New Delhi

For nearly a month, Indians across the country have courted the ire and might of the state over a question no citizen in a democratic nation should have to ask. Their anger stems from the Special Intensive Revision (SIR) exercise which has removed more than 13 crore names from the rolls since June 2025. Over a quarter were claimed dead or duplicated, while most were marked as absent or shifted. At one booth in Delhi's Bela Estate, officials cut 728 out of 729 voters, citing address proof discrepancies. Who decided that so many names should come off the rolls and on what basis?

While the political answer is being debated on the streets and in Parliament, it is clear that the SIR has changed how a voter's place on the roll is decided. In 1995, the Supreme Court held that a name already on the roll should be presumed to be there legally. The SIR replaced that presumption with a data-matching exercise. The Election Commission of India (ECI) has relied heavily on software for a public task where a single error costs a citizen their vote.

Rolls from the last intensive revision (mostly in 2002) were hastily digitised from Bengali, Kannada, and other regional languages, auto-transliterated by the machine into English, and matched against new enumeration forms. Then a second layer of "logical discrepancies," such as a parent-child age gap of less than 15 years, was applied. Among those who failed the test were twins (age gap less than nine months), voters of the Oraon tribal group whose surname Xalxo was auto-translated to Khalkho, and those whose father's name was 'Md.' in one list and 'Mohammed' in the other. To reconcile the record, little logic or reasoning was applied. According to the Internet Freedom Foundation, these rules flagged 17% of West Bengal's electors and 41% of Madhya Pradesh's. A system that suspects four in 10 voters in a State needs to come under scrutiny.

Such sweeping pattern-matching guarantees false positives. In West Bengal, 91% of exclusion appeals decided by the tribunals were reversed; a reversal rate that high should worry whoever designed the process. And by the time their eligibility was restored, these people had already lost the opportunity to vote in the 2026 Assembly election.

Drawing the line

This is why it matters where the line is drawn for who is "suspicious". How many eligible voters are risked to remove one ineligible voter? Legally, Election Registration Officers (EROs) determine where the limit lies. Yet in the SIR, the ECI has never revealed what the acceptable margin of error is or the data itself. Two of the three Election Commissioners are on record objecting to the centralisation of the database and the restrictions imposed on local officers' authority. In Goa, officers heard 97 flagged voters and found all eligible, but couldn't restore them because the software had no option to reverse the earlier action.

The ECI claims that automation is only meant to assist human decisions. This would be true if officers actually had the chance to evaluate every flagged entry. In Delhi, each booth-level officer received about 200 notices to verify within a very tight deadline. When the queue becomes practically unmanageable, the machine's verdict on an individual case inevitably becomes the State's verdict.

The citizen then pays to undo this through hearings and lost wages, or is forced to remain disenfranchised if unable to appeal. In West Bengal, the damage went beyond voting when a June State order marked the ration cards of SIR-removed voters as inactive. The SC has since restored access to food. India has sold its digital public infrastructure to the rest of the world on the premise of inclusion at scale. Built on faulty data, the same architecture excludes at scale, and an error in one register follows a person into the next.

This doesn't mean that the rolls shouldn't be cleaned. What must change is where the risk tolerance lies. A dead voter left on the roll is a clerical error. A living voter who is struck off loses their constitutional right. The ECI should disclose the matching rules and error rates and open itself to an independent audit. No name should be struck off until an officer with actual time and authority verifies the real person behind the data.

The model is already travelling. In January, Chief Election Commissioner Gyanesh Kumar offered the ECINet platform to help other countries build their own versions. In August, U.S. President Donald Trump cited India's photo ID rules to push for stricter U.S. voter laws. Whatever standard the world's largest democracy accepts for electoral error, other nations will follow.

A dead voter left on the roll is a clerical error. A living voter who is struck off loses their constitutional right

Are coronary stents necessary?



Dr. Enas A. Enas

Preventive Cardiologist and Physician-Scientist, Founding President of the CADI Research Foundation USA



Dr. Basil Varkey

Professor Emeritus of medicine

Keralam Chief Minister V. D. Satheesan's recent remarks questioning "unnecessary" angioplasty procedures have drawn objections from medical organisations concerned that it could undermine public confidence in doctors. But the Chief Minister's remarks demand more than a reflex response; it requires a thoughtful, honest response built on up-to-date evidence based on clinical and research studies.

Percutaneous Coronary Intervention (PCI), by balloon angioplasty and stent placement, has transformed cardiovascular care. During an acute heart attack caused by a suddenly blocked coronary artery, prompt angioplasty and stents can restore blood flow, save heart muscle and improve survival. There is no debate about this approach and second opinions are unnecessary as time is of essence in such an emergency. Stents also offer substantial relief to selected patients with persistent activity-limiting angina (chest pain caused by lack of oxygen-rich blood).

There is a crucial distinction between stenting as a life-saving measure in the above situations to medical treatment via stenting because a narrowing of blood vessels is seen on an angiogram. A coronary angiogram shows the anatomy of the arteries; it does not, by itself, establish that a narrowing requires intervention. The decision to intervene and how to intervene must take account of the patient's symptoms, the severity of the blockage, its effect on blood flow, the overall pattern of coronary disease and the expected benefit of intervention.

The landmark ISCHEMIA trial, published in *The New England Journal of Medicine* in 2020, enrolled 5,179 patients at 320 sites in 37 countries with stable coronary artery disease and moderate to severe ischemia (restricted blood flow to the heart). The patients were assigned either to an initial invasive strategy – angiography followed by angioplasty or coronary bypass surgery – or to a conservative strategy of optimal medical treatment, with revascularisation reserved for those who had an acute event or angina. After a median follow-up of 3.2 years, there was no significant difference between the two groups in composite outcomes (cardiac arrests, hospitalisation for unstable angina or heart failure) and all-cause and cardiovascular mortality were similar. After a follow-up of 5 years, there was still no significant difference between the two groups in composite outcome or mortality. The core lesson is that most patients with stable coronary artery disease with ischemia on optimal medical treatment would do as well as those who undergo stenting or bypass surgery.

Concerning scale

The growing scale of PCI in India deserves careful examination. National Interventional Council figures show that annual PCI procedures rose from approximately 1,13,000 in 2008 to more than 7,26,000 in 2024 – an increase of more than six-fold. In contrast, PCI procedures in the U.S. fell by about 40% between 2003 and 2016, reflecting progress in prevention and treatment.

These figures do not by themselves prove that stents are overused in India considering its large population, the substantial burden of premature coronary disease, the socio-economic progress in the past decades and the improved access to cardiac care centres. Nevertheless, the divergence in trends between the two countries raises an important question: how much of the increase in PCI is a reflection of fulfilling a genuine clinical need, and how much of it is a reflection of differences in practice patterns, financial incentives and gaps in knowledge on the efficacy of optimal medical treatment?

Optimal medical therapy, based on evidence-based guidelines, is the foundation of care for all coronary artery disease patients. The elements of optimal therapy include LDL-cholesterol lowering, appropriate anti-platelet treatment, blood-pressure control, evidence-based diabetes management and lifestyle changes. A coronary stent treats a specific narrowing; it does not cure the underlying disease of atherosclerosis or eliminate the risk of future heart attacks. Patients remain vulnerable to disease elsewhere in the coronary arteries and must continue preventive treatment.

The way forward is neither condemnation of cardiologists nor unquestioning acceptance of every recommendation for angioplasty. Most doctors strive to act in their patients' best interests, but no profession is immune to inappropriate practice. The ultimate test of healthcare is not how many procedures are performed, but how many lives are saved and whether patients receive the right treatment at the right time at an affordable cost.

There is a crucial distinction between stenting as a life-saving measure to medical treatment via stenting because a narrowing of blood vessels is seen on an angiogram

The numbers behind Lula's historic victory

Lula secured an unprecedented fourth term in Brazil due to a campaign strategy focussing on high voter mobilisation and populist labour reforms

DATA POINT

Sambavi Parthasarathy
Gandla Sneha
Sachin Swaraj

Lula da Silva's reelection as the President of Brazil on Sunday was no less than a historical feat. The 81-year-old, who defeated his far-right opponent Flavio Bolsonaro, gained at least 10 million votes in less than three weeks **(Chart 1)**.

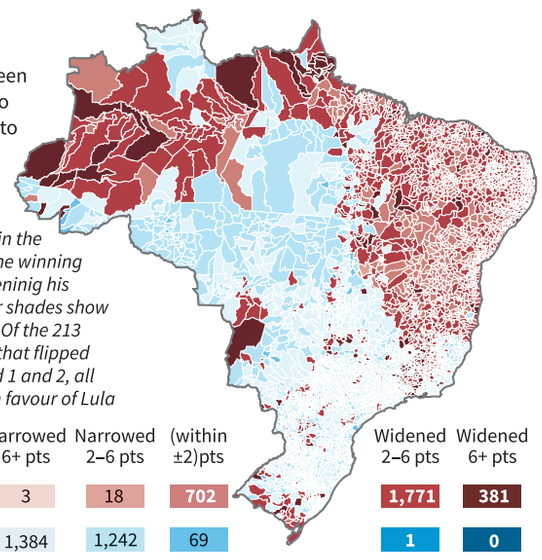
Much of his victory has been credited to a campaign strategy focussing on high voter mobilisation and populist labour reforms including cash payout schemes for the poor and a new debt relief package post the first round of elections – in which he trailed behind Bolsonaro. This was unprecedented in the country's elections as no candidate who had lost the first round in the past had emerged victorious in the second **(Table 2)**. His victory carries implications much beyond Brazil. For much of South America that has been hit by a conservative right-wing wave, Mr. Lula's victory offers a change **(Table 3)**.

Under Mr. Lula's third presidential term, Brazil saw notable economic growth, accompanied by increased labour force participation. The country's real Gross Domestic Product grew cumulatively by 9% between 2023 and 2025, the highest among nine other countries in the region. The share of Brazil's working population increased consistently since 2022. This was accompanied by a rise in average monthly earnings **(Chart 4)**.

Meanwhile, the country's unemployment rate and poverty declined to its lowest in at least a decade. As of 2024, Brazil recorded an unemployment rate of 6.8% and 23% of its population were living below poverty, that is $6.85 a day as per the country's definition **(Chart 5)**. However, the country's household and government debt have surged to new highs increasing borrowing costs **(Chart 6)**.



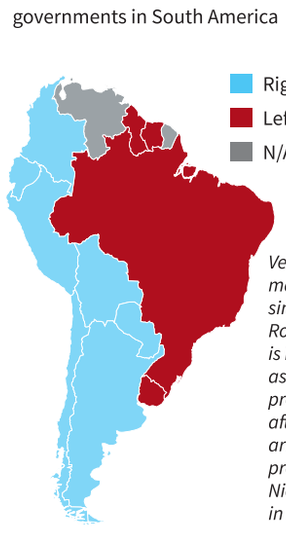
Chart 1: Changes in margins between Lula and Flavio from Round 1 to Round 2



Darker shades in the map indicate the winning candidate wideninig his margin. Lighter shades show the narrowing. Of the 213 municipalities that flipped between Round 1 and 2, all but one were in favour of Lula

	Narrowed 6+ pts	Narrowed 2–6 pts	(within ±2)pts	Widened 2–6 pts	Widened 6+ pts
Won by Lula	3	18	702	1,771	381
Won by Flavio	1,384	1,242	69	1	0

Chart 2: Countries with left and right leaning governments in South America



Venezuela is marked in grey since Delcy Rodriguez is in charge as interim president after the U.S. arrested former president Nicolas Maduro in January 2026

Chart 5: Poverty (left axis) and unemployment (right axis) have declined to their lowest in a decade

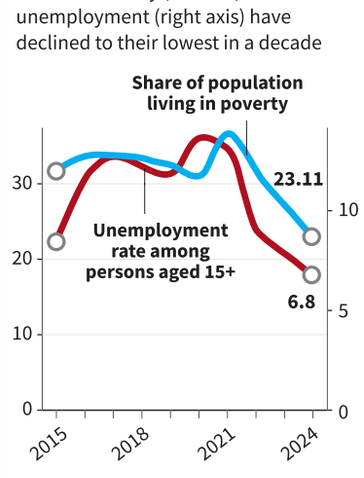
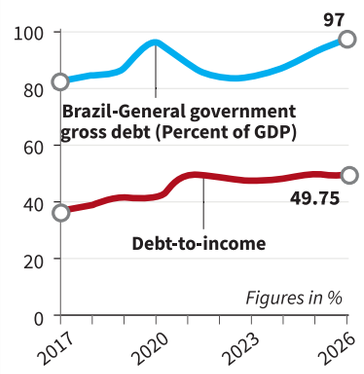


Chart 6: Brazil's household and national debt have surged to new highs in the last decade



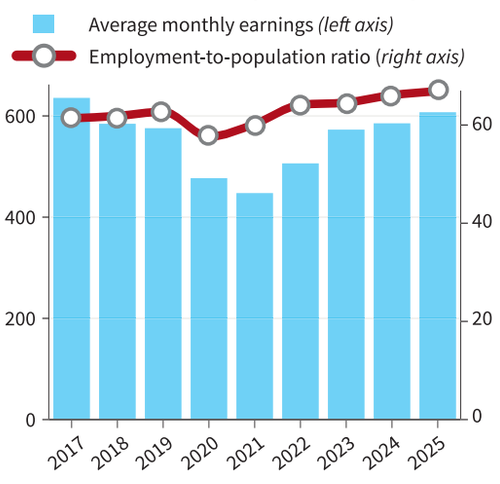
Data for 2026 till October 2026. Gandla Sneha and Sachin Swaraj are interning with The Hindu Data Team

Table 3: Past results of candidates in Round 1 and Round 2 of the Brazil Presidential elections

Year	Round 1	Round 2
1989	Collor (30.48%)	Collor (53.03 %)
1994	Fernando Henrique (54.28%)	-
1998	Fernando Henrique (53.06%)	-
2002	Lula (46.44%)	Lula (61.27%)
2006	Lula (48.61%)	Lula (60.83%)
2010	Dilma (46.91%)	Dilma (56.05%)
2014	Dilma (41.59%)	Dilma (51.64%)
2018	Bolsonaro (46.03%)	Bolsonaro (55.13%)
2022	Lula (48.43%)	Lula (50.90%)
2026	Bolsonaro (47.03%)	Lula (51.79%)

** In 1994 and 1998, no runoff was held because the winning candidates had already secured a majority, receiving more than 50% of the votes*

Chart 4: The share of population employed in the labour force and their average monthly earnings (in $)



FROM THE ARCHIVES

The Hindu.

FIFTY YEARS AGO OCTOBER 28, 1976

ITDC plan to build hotels abroad

New Delhi, October 27: Indian Tourism Development Corporation, world's second biggest public sector undertaking of its kind running a chain of hotels, motels, travellers lodges, beach resorts and forest lodges in the country is planning to set up initially about half a dozen 'Indian restaurants' at 'strategic' places in the world.

According to Lt. Gen J.T. Sataravalla, Chairman and Managing Director of ITDC, now that the Corporation has already built up the necessary hotel infrastructure at important tourist centres within the country, it wants to popularise the famous Indian dishes to the foreigners at these restaurants abroad and also attract them to visit India.

The location of these Indian restaurants abroad has not yet been finalised but they will be set up at some of the important world capitals. Some of them are likely to be located in the oil-rich Gulf countries. The managers of these restaurants will be specially trained in marketing Indian tourism abroad.

The ITDC, which expects to earn Rs 7 crores of foreign exchange during 1975-76, has already entered the field in giving technical assistance abroad in running hotel industry. It is setting up an Indian restaurant at Prague with Czech collaboration.

A HUNDRED YEARS AGO OCTOBER 28, 1926

Message from Mars?

An "Englishman" correspondent cables under date London, October 25: Wireless experts are installing special apparatus on the highest peak of Mont Blanc and will attempt to communicate with Mars on Oct. 27.

[To-day Mars comes within 42,000,000 miles of the earth. An earlier message stated: The periodical "Popular Wireless" is using a 14 valve superheterodyne receiver to listen in. It is pointed out that certain Morse letters and other mysterious signals are received from time to time which are not attributable to any earthly station. Arguments for and against the feasibility of signalling are revived, but the pro-Martians say that Mars as a senior planet possesses older brains on her. In order to open up a conversation amateurs throughout the world are invited to listen in.]

CACHE



Safety check: Dating app users should first vet the platforms they register with, making sure that they agree with how data is collected and processed. GETTY IMAGES

What did a U.S. investigation uncover about Tinder's failure to detect scams?

U.S. lawmakers shared troubling statistics about how dating app users on Tinder and Hinge were matching with scammers, due to outdated AI protections; the probe also acknowledged that Match Group had introduced new safety measures this year to detect scammers

Sahana Venugopal

Earlier in October, U.S. lawmakers revealed how users of dating apps were being exposed to serious financial and physical risks. They pinned this to the outdated AI stack in these applications.

In an investigation centred around the Match Group, the lawmakers found that the algorithm matched U.S. users of dating apps like Tinder and Hinge with scammers.

The report, titled 'Outmatched: Tinder, Scammers, and Match Group's Efforts to Catch Up', highlighted that users connected with nearly 1.5 million scammers on these two popular dating applications in the first nine months of 2025.

At the core of these disturbing findings were outdated machine learning models installed to detect bad actors. These had not been updated in years, according to the report.

This information came from internal documents that the Match Group shared with the committee, led by senator Maggie Hassan. As the accuracy of scam detection dropped, Tinder began depending on other measures that it knew were often ineffective.

"In fact, Match Group knew that Tinder was more likely to show a profile if it belonged to a scammer or other bad actor rather than a regular user," stated an official press release about the report.

However, the investigation acknowledged that the Match Group later put in place new safety measures, such as an AI model in Tinder this year that was designed to detect scammers and bad actors.

What kinds of scams were prevalent on the apps?

The report included statements from victims who described how romance scammers cheated them out of tens of thousands of dollars after building a relationship with them on the dating apps.

A common trend was to cite a major emergency in order to pressure the victim into sending over money. Using the victims' phone number and/or email ID, the scammers would proceed to harass them online until the victim sometimes paid them in the hopes of de-escalating their aggression.

Another type of scam involved the same malicious user operating as different people on the same dating app, to ensnare more victims.

The report pointed to an inconsistent dating app AI strategy, where patchy machine learning systems led to heavy caseloads and "overwhelmed" human moderators who were unable to focus on visibly risky accounts. As per a document from the Match Group itself, Tinder could have better tackled dangerous accounts by building better AI signals or reducing its reliance on manual rules.

"In practice, these moderation lapses meant that bad actors that reached moderation were not immediately banned and instead may have continued to interact with and harm legitimate users until the platform gathered additional evidence," explained the report.

What is the takeaway for Indian dating app users?

A bouquet of dating apps come under the Match Group, including Tinder, Hinge, Match (formerly Match.com), Plenty of Fish, and more such offerings, catering to users in diverse countries and cultural communities.

In other words, a security lapse in one app comes with serious implications for the users of other Match Group-owned apps. Tinder and Hinge are popular in India as well, claiming the top ranks in terms of downloads via app marketplaces.

According to the Match Group, Hinge is expected to reach $1 billion in revenue in 2027, while Tinder is expanding its in-person events that are already live in the U.S. and Europe.

Indian users often register with apps that suggest profiles and tout AI-powered matchmaking as a selling point. However, as the U.S. committee report noted, cutting-edge AI tools require constant upkeep, testing, and upgrades in order to ensure that customers remain shielded from emerging threats.

Regulators must also play a larger role in monitoring dating app services.

How can users avoid scammers on dating apps?

Dating app users should first vet the platforms they register with, making sure that they agree with how data is collected and processed.

Users should also be aware of the reporting options they have in case an online or offline interaction turns unsafe. Customers can research the apps' founders, investors, and brand ambassadors, to make sure that there is an alignment of values.

Dating app users should promptly report fraudulent user profiles and cease interacting with them. AI-generated user photos and videos, even when posted as a joke, often violate platform policies.

Another red flag is a dating app user who becomes intimate too quickly or is eager to discuss finances early on. Furthermore, scammers often pressure dating app users to contact them on external sites, so they can view the user's phone number or harvest other personal details.

Users must withhold personal phone numbers, email IDs, home addresses, private social media channels, and employer information until they meet a match in-person and feel comfortable with proceeding.

THE DAILY QUIZ

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

At the age of 81, Luiz Inácio Lula da Silva has secured an unprecedented fourth term as the President of Brazil. Here's a quiz on the veteran leader

Joan Sony Cherian

QUESTION 1
Lula is a founding member of the Workers' Party or the Partido dos Trabalhadores. When was it formed?

QUESTION 2
After Lula won his third term in 2022, an incident mirroring the 2021 January 6 Capitol hill riots happened in Brazil where Brazil's Congress and Supreme Court buildings were stormed. Why?

QUESTION 3
Brazil's top political leaders were hit by scandal when in 2017 a high-profile anti-corruption investigation exposed money laundering and corruption among the top brass. It also led to Lula's arrest on the same charges in 2018. Name the anti-corruption probe.

QUESTION 4
Campaigns and pictures routinely feature the number '13' in association with Lula. What is the significance of the number?

QUESTION 5
In 2004, a *New York Times* article on President Lula infuriated him so much that the reporter of the article had his journalist via revoked by the Brazilian government. They said the article was "offensive to the honour of the President". Name the reporter and what the article said.



Visual question: Here, Lula is seen with another global leftist leader and icon. Name the revolutionary leader. AFP

Questions and answers to the previous day's daily quiz: 1. Name of Pakistan's Prime Minister when martial law was proclaimed in October 1958. **Ans: Feroz Khan Noon**
2. Mirza abrogated this when he proclaimed martial law on October 7, 1958. **Ans: The Constitution of 1956**
3. The system of indirect elections, which was introduced by Ayub Khan in 1959 as the foundation of his political structure. **Ans: The Basic Democracies system**
4. Ayub Khan relinquish the presidency in this year, ending his period in power. **Ans: 1969**
5. Iskander Mirza went into exile to this country after his removal from office. **Ans: The United Kingdom**
Visual: This is a front-page report in *The Pakistan Times* dated March 10, 1951, announcing arrests in a conspiracy that preceded Ayub Khan's military coup by seven years. State the name by which the conspiracy is known. **Ans: The Rawalpindi Conspiracy Case**
Early birds: KN Viswanathan| Mohan Lal Patel| Tamal Biswas| Baburam Sapre| Arun Kumar Singh



FROM THE ARCHIVES

Know your English

S. Upendran

What is the meaning of "hogwash"? (Geetha Udaykumar, Mannarkudi)
This is a word, which is normally used in informal contexts. When somebody says something and you respond by saying, "hogwash", what you are implying is that as far as you are concerned what the individual has said is nonsense. Here are a few examples.

What she told me was hogwash.

I have no time to listen to your hogwash, Seema.

The word has the same meaning as "baloney".

I am not here to listen to your baloney.

His baloney didn't go down well with the boss.

Bad food and drink can also be called "hogwash".

The stuff that was served at the wedding was hogwash.

Don't go to the new restaurant. The food is hogwash.

Shouldn't it be World Trade Centre and not "Center"? (P.P. Hafeez, Kerala)
The word "Center" has been spelt correctly. That's the way the Americans spell it. A few words, which end in "re" in British English, the Americans spell it "er". Here are a few examples: meter, center, and theater.

Which of the following sentences is correct? "He walked into the apartment" or "He walked in the apartment"? (B. Abhishek, Bengaluru)
Both the sentences are grammatically acceptable, but their meaning is very different. When someone "walks into" an apartment he enters it. In other words, the individual has stepped into the apartment. He was outside all the while and now he has stepped inside.

Similarly, when you say that someone has "moved into" his new apartment, what you are implying is that he has shifted to his new apartment. He has made the new place his home. When you say that someone "walked in the apartment" what you are saying is that the individual walked around inside the apartment.

Unlike the earlier example, the individual is not entering the apartment. He is already inside and he is moving about. The action takes place within the apartment.

What is the meaning of the idiom "sink your teeth into something"? (P.K. Abu Baker, Calicut)
When you sink your teeth into something, you undertake to do something; you perform the task with a great deal of enthusiasm and interest. Here are a few examples.

His new role as a villain gave him something that he could sink his teeth into.

The new project is really interesting. Can't wait to sink my teeth into it.

It is also possible to say "get one's teeth into something". Here are a few examples.

He just couldn't get his teeth into his new role.

My wife has been telling me to get my teeth into some social work.

Published in The Hindu on May 21, 2002

Word of the day

Purveyor:
someone who supplies provisions

Synonym: supplier

Usage: *The company is a leading purveyor of gourmet food.*

Pronunciation: newsth.live/purveyor

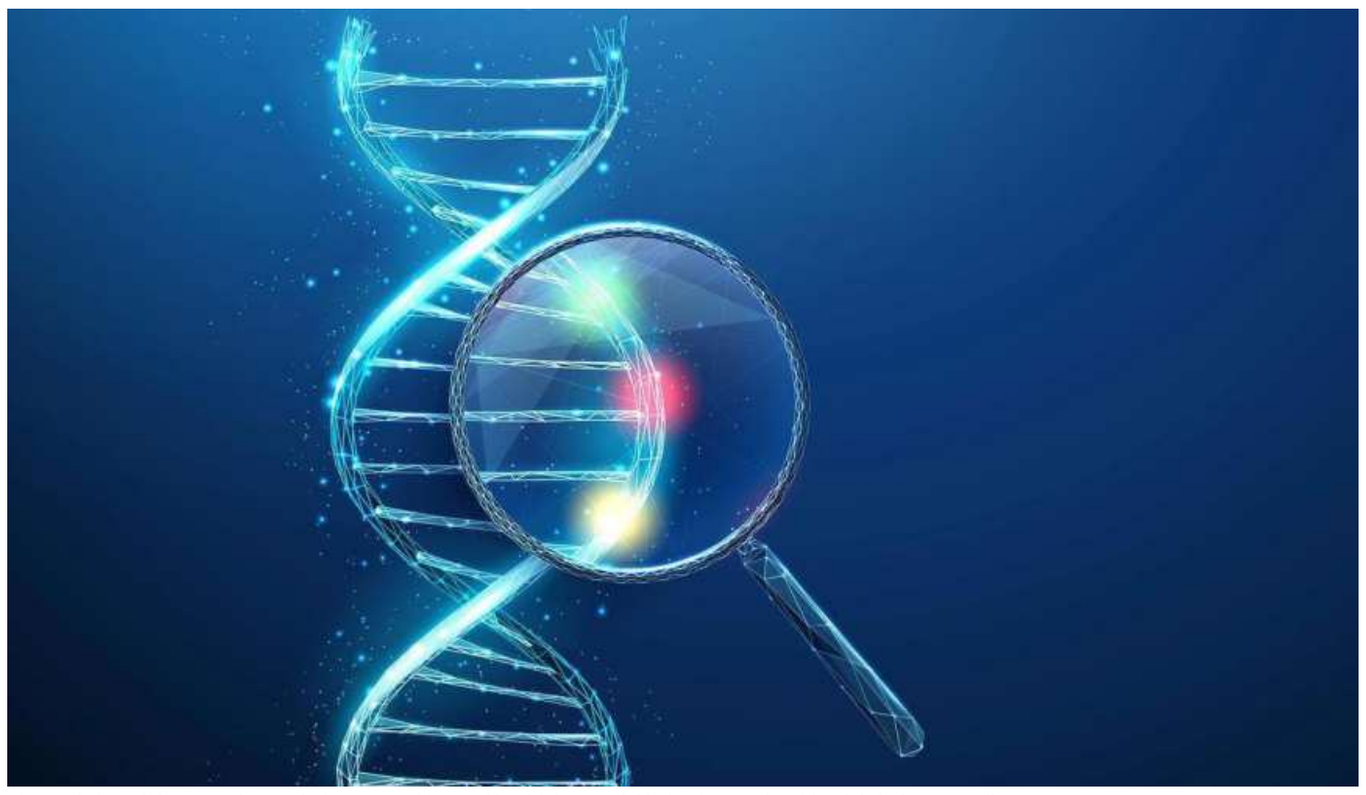
International Phonetic Alphabet: /pə(:)ˈveɪə/

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

Your DNA says less about your personality than a short online quiz

The findings of new research reinforce a long-standing idea in genetics that there is no single 'personality gene'; the dataset the researchers used also directly challenged older theories that attempted to link traits to particular brain chemicals

Anirban Mukhopadhyay
NEW DELHI



The study found that genetic correlations extend beyond health into social behaviour and residential choices as well. GETTY IMAGES

Decades of psychology have categorised human personality into five broad buckets: openness to experience (curiosity and imagination), conscientiousness (organisation and responsibility), extraversion (sociability), agreeableness (compassion), and neuroticism (a tendency towards anxiety and volatility).

In new findings published in *Nature*, scientists have completed one of the largest-ever genetic analyses of these 'big five' traits, offering a more detailed picture of the genetic architecture of personality.

"The finding that genetic signals were broadly consistent across different contexts... supports the view that personality traits such as extraversion and neuroticism have a biological basis," Veena Kumari, professor of Experimental Psychology at Brunel University London, said. "However, like most psychological constructs, personality is a complex phenotype." She noted that human behaviour remains deeply tethered to its environment and "may not be similarly expressed, or even measured with the same precision" across different walks of life.

Inside the genome

The global team of researchers analysed data from up to 1.14 million participants across 46 study cohorts. Participants first completed validated personality questionnaires, which allowed the researchers to assign each person a score for the five traits.

The researchers then analysed the participants' DNA using a genome-wide association study (GWAS). That is, they looked across the genome for tiny genetic differences that tended to occur more often in people with higher or lower scores on each personality trait.

"The study identified some 1,250 DNA [variations] that are associated with personality traits," Mani Ramaswami, professor of neurogenetics at Trinity College Dublin, said. "It is important to note that these are tiny changes in the DNA and not the genes as a whole. Each one on its own has a minuscule effect" on human behaviour.

The goal of this exercise was not to find a single piece of DNA that determines whether someone is outgoing or anxious but to spot patterns spread across the genome in the form of genetic variants that, taken together, could be associated with small differences in personality across a large number of people.

Genes and life

The findings reinforced a long-standing idea in genetics that there is no single 'personality gene'. The dataset also directly challenged older theories that attempted to link traits to particular brain chemicals. The team found several gene variants scattered across the DNA, and tallied them up into a single number called a polygenic index – a score that combines the effects of the variants, each associated with specific traits.

The researchers then used these scores to test whether the genetic patterns associated with personality turned up in other parts of the people's lives. Specifically, by comparing these indices with large publicly available datasets on health, behaviour, and social outcomes, they found a range of genetic connections. For example, genetic patterns associated with higher conscientiousness were linked to a lower body mass index, fewer hospital visits, and lower substance use. Genetic patterns associated with neuroticism, on the other hand, showed strong associations with anxiety, depression, and other psychiatric disorders.

Seeing DNA linked to such serious health outcomes might make the index sound like a genetic crystal ball. Michel Nivard, professor of genetic epidemiology at the University of Bristol, is quick to burst that bubble.

"Look, if you want to know more about your personality, you can take a 3-5 minute online test. It will be highly predictive," Dr. Nivard said. For an individual, he said, the genetic effect "is weak, and adds no information over a 3-5 minute test at all."

Instead, the breakthrough's true value is at the macroscopic level. The genetic data is "strong enough to do new kinds of psych-, bio-, and social science of personality in larger groups," Dr. Nivard said, "where we work with averages across many individuals."

Beyond correlations

Hemant Tiwari, professor of Biostatistics at the University of Alabama at Birmingham, warned against jumping to conclusions like having a neurotic personality could cause someone to become depressed.

He noted that human biology is messy, and "shared genetic influences can affect personality, psychopathology, cognition, self-regulation, and health simultaneously."

In other words, the same genes that shape our temperament may also trigger certain health issues, rather than one causing the other. Because the data cannot reliably separate the two, Dr. Tiwari said, "whether personality itself causally drives downstream outcomes remains unresolved."

The genetic correlations extend beyond health into social behaviour and residential choices as well. The study found that by middle age, people with genetic profiles associated with higher openness to experience were more likely to have moved into cosmopolitan professional areas. Meanwhile, those with genetic profiles associated with higher conscientiousness were more likely to have moved away from cosmopolitan areas and toward affluent suburban communities.

The researchers also tried untangling nature from nurture by looking at siblings in their data. Siblings share the same upbringing but inherit slightly different combinations of DNA. By comparing them, the researchers could strip away the effects of the childhood environment and isolate the direct impact of genetics.

While parents still shape their children in complex ways, the data show the environmental transfer of personality is neither strong nor straightforward. As Dr. Nivard noted, the findings largely exclude "the possibility that extraverted parents environmentally cause their kids to be more extraverted".

Sequencing within families

Translating these insights into global clinical practice, however, faces a severe bottleneck. The genomic databases powering this research are dominated by individuals with European-like genomes. When a polygenic index built on such data is applied to populations with different genetic ancestries, prediction generally becomes less reliable.

Moving forward, Dr. Ramaswami said DNA sequencing within families exhibiting extreme behavioural variants will be far more useful than broad population studies.

An approach along these lines, he noted, is already being pioneered in India for psychiatric conditions through a joint effort by the National Centre for Biological Sciences (NCBS) and the National Institute of Mental Health and Neurosciences (NIMHANS), both in Bengaluru.

(Anirban Mukhopadhyay is a geneticist by training and science communicator from New Delhi.
anirban.genetics@south.du.ac.in)

THE GIST

A recent study has offered a more detailed picture of the genetic architecture of personality

The global team of researchers analysed data from up to 1.14 million participants across 46 study cohorts

Participants first completed validated personality questionnaires, which allowed the researchers to assign scores to each person

The researchers then looked across the genome for tiny genetic differences that tended to occur more often in people with higher or lower scores on each personality trait

The study identified some 1,250 DNA variations associated with personality traits, with each one on its own having a minuscule effect on human behaviour

BIG SHOT



Vincenzo Valentini, director of the Center of Excellence for Oncology and Diagnostic Imaging at the Tiberina Island Hospital in Rome, poses in the radiotherapy department, Rome, October 6, 2026. Through large windows, the clinical space looks directly onto the archaeological remains of an ancient Roman temple, offering patients a contemplative view before their oncology treatments. AFP

WHAT IS IT?

Glaciers ending in lakes

Press Trust of India

Glaciers ending in lakes, oceans or ice shelves account for over 3% of the world's glaciers but lost 134 billion tonnes of ice annually between 2000 and 2019, contributing to more than half of all glacier ice loss, a new study has found.

Environmental scientists led by the UK's University of Birmingham and the University of Leeds found that glaciers ending in lakes are generally much larger than those ending on land, together covering more than half of the world's glacier area.

The findings, published in *Nature Communications*, also showed that lake- and ocean-ending glaciers flow on average 10% and 44% faster than those ending on land, respectively, and lake-ending glaciers lose around 57% more ice than land-ending glaciers, relative to their size.

"Glaciers ending in lakes really stand out -- they're losing ice particularly quickly. We don't yet know exactly why. It could be the lakes themselves, the size and shape of the glaciers, or a bit of both. Untangling that is the next big question, especially as glacier lakes are becoming more common in a warming climate," said author Joseph Mallalieu.

The researchers explained that lakes can affect glaciers in ways that may contribute to a higher ice loss. Lake-ending glaciers can lose large chunks of ice from the glacier front as icebergs, a process known as calving, and lake water can melt the ice below the waterline, both helping to speed up ice loss, they said.



Ice melts at the Skuta glacier near Kamnik, Slovenia. AP

Models used for projecting glacier change do not yet fully account for glaciers ending in lakes, the researchers added.

For feedback and suggestions
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WEB EXCLUSIVE
Why I am on a hunger strike as a Jamia student
— Ebin Basil
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WORDLY WISE
The limits of my language mean the limits of my world.
— Ludwig Wittgenstein

The Indian EXPRESS
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RAMNATH GOENKA
IN 1932

BECAUSE THE TRUTH INVOLVES US ALL

ECI affidavit to Court has unbroken silences

THE AFFIDAVIT that the Election Commission of India has filed before the Supreme Court is underwhelming, raises more questions than it answers. It comes in response to a petition in the wake of this newspaper's investigation into the ECI's functioning during the ongoing Special Intensive Revision of electoral rolls. The investigation highlighted the erosion of internal checks and balances in the three-member constitutional body that underwrites democracy's fundamental compact. It pointed to its shrinking, on the watch of Chief Election Commissioner Gyanesh Kumar, into a one-man show. Now, the affidavit projects an impression of unanimity, and justifies the Commission's decision-making processes. But it does so while blurring important distinctions and is riddled with persisting silences. The objections recorded by the two ECs, Vivek Joshi and Sukhbir Singh Sandhu, 14 in 10 months, were part of the consultative process, it says — this papers over the fact that most of them were about orders already issued and decisions taken without keeping the two ECs informed. Even where the ECI makes corrections, it does not do so fully. It rolls back controversial changes made to Form 6 for first-time voters online, and sets up a committee that includes experts to review ECINet's compliance with the law. It does so, however, without acknowledging the mistake, or holding anyone accountable.

Going ahead, the persistence of unresolved questions could return to haunt an institution whose credibility is pivotal for safeguarding the right to vote and nourishing people's trust in free and fair elections. In Goa, for instance, 88 of the 97 voters who were left out of the final rolls have subsequently applied through Form 6. But why did the software block, in February, the Electoral Registration Officers' decisions to reverse the deletions? The affidavit has no answer. It addresses a question in West Bengal, but leaves others hanging — the appeals against orders restoring voters to the electoral roll were filed by the office of the state's Chief Electoral Officer, it says. But why were Commissioners Sandhu and Joshi kept in the dark when they asked about this matter earlier, and how did an exercise of this scale proceed, in the name of the Commission, with this level of opacity — again, there are no answers in the affidavit.

The SIR process continues to stumble. In West Bengal, a report in this newspaper has also revealed, judges of tribunals appointed by the Court to decide appeals of those affected by the SIR have pointed out that the ECI requirement for Aadhaar authentication in its portal is coming in their way. Their problem, among others, needs to be addressed by an ECI that listens, one that gives primacy to due process in its conduct vis-à-vis other players and institutions, and internally. The affidavit is an imperfect start. The Court, which has a distinguished record of upholding Article 324 that secures the ECI's powers, must now nudge it towards a course correction. That requires, first, fuller transparency.

Workforce shake-up is here to stay. Brace for it

MICROSOFT (MS), the technology company synonymous with computers and software, has made a "voluntary exit offer" to as many as 60,000 of its staff. Its Chief People Officer said that it "gives eligible employees who may be considering a future outside the company a new choice to make that transition now with support". "With support" suggests that those who do not take up the offer may face a future scenario where they may be let go of, but without the monetary compensation that is available now. The move affects 27 per cent of MS's total workforce spread across the US, Canada, the UK and India. This comes on the back of a "voluntary retirement programme" in July that was offered to more than 8,700 employees. More than 30 per cent of them accepted it even as MS followed it up by firing another 4,800 a few weeks later.

While it was not stated openly, a reason for these layoffs is the advent of artificial intelligence. Companies like MS are finding, one, that with the power of AI by their side, they can do more with fewer employees. And two, that there is a need to free up money so that hundreds of billions of dollars more can be invested into building AI infrastructure. MS is neither the first company nor the only one that is cutting employees in the wake of AI. Reportedly, some of the biggest players across technology and banking — Barclays, HSBC, Oracle, Meta, Amazon, to name a few — have shed significant bits of their workforce in 2026. What's more, companies are doing it even as their profits continue to grow.

The immediate impact of AI-related restructuring at the global scale will also be felt by Indian IT companies. It is possible that, in the short term, the transition to AI will create some job opportunities, but over the medium term, this industry, which is the largest provider of white-collar jobs in India, will likely face headwinds. The bigger challenge, however, is for Indian policymakers. AI's much-touted ability to replace humans threatens India at a time when the country is experiencing a bulge in its youth population, while struggling to create good quality jobs, amid growing unrest among the young. These trends should make policymakers rethink their human resource strategies.

Language, the original maxxer

WORDS CAN travel far enough from their roots that they lose any obvious connection to their origins. Take "camouflage". The root word, *camouflet*, described a practical joke that involved blowing air up someone's nose while they slept. "Berserk", which now means "out of control with anger", comes from the Old Norse noun *berserkr*, which described frenzied warriors who wore bearskin coverings. "Weird" derives from the Old English noun, *wyrd*, which largely translates to "fate" (the transformation began with Shakespeare's *Macbeth*). Now, there's "maxxing", Dictionary.com's word of the year for 2026.

Born from Game Theory, the word was absorbed into video and board gaming slang, before 4chan message boards and incel circles turned it into the portmanteau "looksmaxxing": The practice of going to extreme lengths — like breaking and reforming one's jaw — to "improve" one's looks because that, according to the strange logic of misogyny, was the only way to gain confidence and attract women. But as with *wyrd*, so with maxxing — people have made the term their own.

Having been absorbed, and diluted, by the mainstream, maxxing appears now to embody self-improvement. "Proteinmaxxing" to be healthier, "hustlemaxxing" to realise one's potential, "vocabularymaxxing", to have new thoughts with new words. Language, it turns out, is as good as ever at meaningmaxxing.

A visit to Baku, a gateway to a changing Eurasia



RAJA MANDALA
BY C RAJA MOHAN

EXTERNAL AFFAIRS Minister S Jaishankar's visit to Baku last week pointed to a reset in relations with Azerbaijan that had soured in the last few years. Like the dramatic turnaround in ties with Canada over the past year and a half, the opening in Baku reminds us that productive diplomacy is possible even with countries dismissed as hostile by public opinion.

Even more interesting, the positive results from the engagement with Azerbaijan underline the enduring power of nationalism and self-interest over political affiliations based on religion and ethnicity. Indian perceptions of Turkey, Azerbaijan and Pakistan as a strategic bloc hardened during Op Sindoor in May 2025. Going back a little further, Delhi flagged the 2021 Islamabad Declaration by the three countries, which backed Pakistan's position on Kashmir. Their "Three Brothers" military exercise in Azerbaijan that year gave the partnership a memorable label. During Op Sindoor, calls to boycott Turkey and Azerbaijan spread through television and social media into travel and trade.

Obscured by the media outrage was the reality that Baku's ties with Islamabad were thinner than the language of brotherhood suggested. Baku's engagement with Islamabad was a consequence of Azerbaijan's close ties to Turkey. But Baku's apparent solidarity with Ankara is now showing strains. As Azerbaijan prepares to hand the chair of the Organisation of Turkic States (OTS) to Turkey this week, their emerging differences offer a reminder of the gap between rhetoric on trans-national solidarity and national interests.

Pan-Arabism and pan-Islamism have struggled to overcome divisions in the Middle East. Pan-Turkism, promoted by Turkey's leader Recep Tayyip Erdoğan, also faces limits in Eurasia. Shared religious and ethnic identities can facilitate practical cooperation, but they do not automatically produce a unified strategic bloc.

The idea of Turkic unity gained ground in the late Ottoman era amid imperial decline and European expansion. The Soviet collapse in 1991 opened an opportunity for Ankara to reconnect with the former Soviet republics of the Caucasus and Central Asia. But the new republics valued their sovereignty. They were not interested in trading one hegemon for another. The Turkic Council, established in 2009, became the Organisation of Turkic States in 2021. Its agenda spans trade, transport, technology and culture. Common security commitments are more difficult to develop. The OTS brings together Turkey, Azerbaijan, Kazakhstan, Kyrgyzstan and Uzbekistan. Turkmenistan, although Turkic-speaking, remains an observer.

Recent political friction between Ankara and Baku illuminates the problem. Azerbaijan's restrictions on Islamic headscarves in schools drew sharp criticism from conservative Turkish voices. Baku defended its secular order and rejected outside interference. Azerbaijani authorities also issued arrest warrants for Turkish nationals accused of incitement. Behind the dispute lie different political orientations. External solidarity does not translate into a common position on the relationship between state and religion.

> Azerbaijan's energy resources and transport links give it influence across the Caucasus, inner Asia and the Greater Middle East. Closer engagement can help Delhi expand its access to these regions

Foreign policy adds another divide. Azerbaijan values its strategic relationship with Israel, including defence cooperation. Turkey, the first Muslim-majority country to recognise Israel in 1949, is now sharply at odds with it. Baku sees no reason to abandon a partnership important to its security. To be sure, the Turkish-Azerbaijani partnership has strong roots. That does not mean they will take unified positions on all issues.

The Central Asian republics present a parallel challenge to ambitious visions of Turkic unity. They welcome Turkish investment, transport links and military technology. But they also pursue "multi-vector" partnerships , much like India's "multi-alignment". Their security circumstances differ from Turkey's. Ankara is a prominent member of NATO; and Central Asian states must carefully manage their relations with the big neighbours allergic to NATO — Russia and China.

Kazakh President Kassym-Jomart Tokayev made the Central Asian approach clear by rejecting the proposals to turn the OTS into a military alliance or geopolitical bloc. Kazakhstan and Kyrgyzstan also belong to the Russia-led Collective Security Treaty Organisation. Growing economic ties with China present additional constraints. Central Asian states seek partners to strengthen sovereignty and widen their choices while retaining freedom to engage other powers.

There is, nevertheless, much that Turkic cooperation can achieve. Better ports, railways and customs arrangements can bring material benefits to inner Eurasia. Such initiatives are reshaping its economic geography without requiring agreement on every security question. India must engage this changing Eurasian landscape. Russian power, China's growing presence and Turkish and Iranian ambitions are real. But the Caucasus and Central Asian states have agency of their own.

Jaishankar's visit recognises Azerbaijan's place in that strategy. It borders Russia and Iran, connects westwards through Georgia and Turkey, and looks across the Caspian towards Central Asia. Azerbaijan's energy resources and transport links give it influence across the Caucasus, inner Asia and the Greater Middle East. Closer engagement can help Delhi expand its access to these regions and strengthen its wider continental diplomatic presence. The Caucasus, nestling between the Caspian and Black Seas, has long drawn Russian, Ottoman and Persian ambitions. Its changing balance deserves sustained Indian attention.

India has energy interests in Azerbaijan and a stake in the International North-South Transport Corridor. Baku's ties with Israel and the United Arab Emirates offer further convergence. Delhi can explore these while preserving its partnership with Armenia, as Baku and Yerevan pursue normalisation.

India does not object to other countries having relations with Pakistan. But it does seek their neutrality in India-Pakistan disputes. Our intense social media debates can easily miss the fact that Pakistan's friends have interests of their own. Some of them overlap India's. Exploring that common ground is better than giving Islamabad a veto over Delhi's diplomatic choices. The opening in Baku should encourage Delhi's exploration of a reset with Ankara at an opportune moment.

The writer is a contributing editor on international affairs for The Indian Express. *He is also a professor and director at the Motwani Jadeja Institute of American Studies, Jindal Global University, Delhi*

Not just welfare for elderly, Keralam needs silver economy



MUHAMMED RIYAS

KERALAM IS ageing faster than most Indian states. People aged 60 and above accounted for around 15 per cent of the population in 2021; this is projected to reach 30 per cent by 2051, according to the International Institute of Migration and Development. Longer life expectancy is an achievement, but it raises questions about pensions, care and public finances. The challenge is not simply to support more older people, but to enable them to age with dignity, financial security and meaningful participation.

The Keralam Senior Citizens' (Care and Protection of Rights) Bill, 2026, unanimously passed by the state Assembly on Monday, marks an important step towards strengthening the rights, care and protection of senior citizens. It proposes regulation of care centres and caregivers, protection against abuse and neglect, and measures concerning home-based care, accessible public spaces, digital inclusion, legal assistance and assistive products. Provisions concerning living wills and ageing at home seek to protect autonomy. Importantly, the Bill recognises income-generating opportunities and the sharing of older people's knowledge with younger generations. Its proposed State Reserve Fund could help finance care and welfare.

Keralam's approach to senior citizens must build on, rather than be confined to, the established framework of welfare and social protection. Pensions, healthcare, protection from abuse and affordable care remain non-negotiable. Nor should productive ageing become an obligation for people who have contributed throughout their working lives. It should be a choice, supported by opportunities for those who wish and are able to participate.

Kerala has many retired teachers, nurses, engineers, administrators, entrepreneurs, artisans and skilled workers. Their experience could support mentoring, vocational training, entrepreneurship and community development. Universities and local governments could connect this expertise to local needs.

The broader opportunity is to develop a silver economy, goods and services responding to an ageing population. Home healthcare, physiotherapy, assisted living, accessible housing, age-friendly transport, assistive technologies and lifelong learning can improve older people's lives while creating dignified jobs for younger workers. The Bill's caregiver certification framework should be accompanied by fair wages, social security, safe working conditions and career progression. Public provision and financial assistance are necessary to make care affordable for low-income households.

> Home healthcare, physiotherapy, assisted living, accessible housing, age-friendly transport, assistive technologies and lifelong learning can improve older people's lives while creating dignified jobs for younger workers

Local governments should anchor this transition. The state should consider a senior citizens' sub-plan, with predictable funding and clear responsibilities for panchayats and municipalities. It should identify needs, set spending priorities and assess outcomes. Local governments could assess care needs, mobility barriers, financial vulnerability and older people's skills and interests. They could coordinate home-based care, day-care services, public spaces and mentoring opportunities. The Department of Senior Citizens could set service standards, provide technical support and monitor implementation.

The state should provide earmarked transfers or a dedicated funding window while allowing local bodies flexibility. The proposed State Reserve Fund could complement predictable budgetary support, not replace it. Funding for essential care should be protected alongside investment in participation and livelihood opportunities.

Financial security remains the foundation. Employment cannot substitute for social protection, nor should the silver economy shift responsibility from the state to older people and their families. The Bill's success should be measured by more than registered care centres or resolved complaints. Keralam must also ask whether older people are secure, receive dignified care and can contribute on their own terms. Welfare and protection are indispensable; the next step is an economy of care, experience and intergenerational solidarity.

The writer is a faculty member at SIBM Bengaluru

Sudhakar Nadkarni was key in the making of Indian design



ANIL ZANKAR

I HEARD of Professor Sudhakar Nadkarni in 2017, when he received a lifetime award from IISc. What little information came my way triggered my curiosity, leading me to his book *The Design Journey*. This professional autobiography of a designer made me marvel at his achievements, the longevity of his career and the energy with which he worked. Also striking was his tendency to acknowledge his colleagues' contributions. Most of his endeavours were collective efforts, with credits shared fairly. Subsequently, I decided to film him and obtained some marvellous footage from his interviews. It revealed to me the many finer and humane aspects of his work and personality.

Nadkarni breathed his last on October 20 in Mumbai at the age of 90. His seven-decade-long career began in 1958 when he joined an advertising agency in Mumbai as a commercial artist. There, a colleague, Yeshwant Chaudhury, advised him to join Ulm Design School in Germany, which was at the time reputed to be the best design school in the world. Nadkarni landed in Ulm in December 1962, dressed in summer clothes, with no knowledge of what design meant, nor of the German language.

This middle-class Marathi boy's journey would develop into a glorious chapter of design practice and education in India. In 1966, on returning to India, Nadkarni joined the small group of pioneering design teachers at NID. In 1969 at IIT Bombay, he set up the Industrial Design Centre (IDC) and raised it to global stature through a rigorous curriculum and international collaborations. He arranged for young teachers to get global exposure. After he stepped down in 1997, IIT Guwahati invited him to set up a design department. In 2004, when he returned to Mumbai, Welingkar Management Institute invited him to set up a customised design department. He was associated with the institute till 2020.

It was Nadkarni's belief that a designer must be informed by his own socio-cultural tradition on the one hand and emerging modernity on the other. Although trained in the best and the latest European tradition, he strongly believed in developing an Indian perspective. Nadkarni's final-year thesis at Ulm (in 1966) was called "Design as one of the factors in developmental planning, India as an example". His design for the final project was the iconic Aarey Milk Booth. He despised elitism in design practice.

Ever a disciplinarian, there was also something of the maverick about him. Students held him in awe, but they could also draw caricatures of their favourite "Nadu sir". In June, when his book *by design* was released, the function was attended by a few hundred people, mostly his students and colleagues. They put up skits that presented him as the absent-minded professor, but their reverence and warmth for him was unmistakable.

Besides IISc, Nadkarni was honoured with the Lifetime Achievement Award by the India Design Association (2015) for building institutions and his contribution to the field. The Bauhaus Manifesto defined an artist as "an exalted artisan". Professor Nadkarni was the perfect example of this. When the Ulm school closed down, its tradition found a new life in India thanks to him.

> The Bauhaus Manifesto defined an artist as 'an exalted artisan'. Professor Nadkarni was the perfect example of this. When the Ulm school closed down, its tradition found a new life in India thanks to him

Zankar is a writer and filmmaker

40 YEARS AGO
October 28, 1986


SAREES
INDIAN EXPRESS
LUXMI
Sukhjinder held at Ramgarh
Hoshiarpur under curfew after clash
Bandh in Punjab partial

Curfew in Hoshiarpur

ONE PERSON was killed and another injured by suspected terrorists in Punjab, while the statewide bandh in protest against terrorist killings at Khumban village passed off peacefully barring Hoshiarpur town, where indefinite curfew was imposed following clashes and police firing. Suspected terrorists shot dead a shopkeeper in Khwajpur village in Verowal, Amritsar district.

Badal Dal leader arrested

SUKHJINDER SINGH, a prominent leader of Akali Dal (Badal group) and former education minister, was arrested from his native village, Ramgarh, in Kapurthala district. The Punjab Police and CRPF personnel went to his residence and took him into custody. Singh was taken to Adampur aerodrome, from where he was flown to Delhi in a special plane.

Panel finds rape cover-up

A SUPREME Court commission has blown the cover off a conspiracy by top police officers to erase evidence of the rape of a Gujarati tribal by several policemen. The rape of 22-year-old Gunta Behn of Sagbara taluka in Bharuch district was sought to be covered up by the collector, two doctors of the local public hospital, the deputy superintendent of police, the SP and a sub-inspector among others. The commission has indicted all of them in a report submitted to the SC.

Two killed in Tripura firing

TWO PERSONS were killed when police fired to quell a violent mob in Jatrapur area of West Tripura district. Sources said the firing took place after a stone-throwing mob attacked a police station to snatch away two persons, arrested on the charge of drunkenness.

WHAT THE OTHERS SAY

Lula's comeback is a victory for Brazil and the world, as well as a Trump rebuff.
— The Guardian

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On theatre commands, let's finish arguing, reach a settlement, before next crisis comes



ARUN PRAKASH



ILLUSTRATION: C R SASIKUMAR

SEVEN YEARS after the government directed the newly minted Chief of Defence Staff (CDS) to restructure military commands and bring about jointness through the establishment of theatre commands, the debate seems to have become a quarrel over turf garbed in the language of high principles. The Army worries about not getting air support when needed. The Air Force worries that its scarce squadrons will be divided and controlled by theatre commanders. The Navy worries that a continental mindset will starve it of resources.

These worries are legitimate. But their persistence shows that we have failed to learn what others have learned the hard way: That air power has been a bone of contention between the services ever since World War I, and that inter-service disputes are best settled by negotiations under the watchful eye of committed politicians who comprehend the gravity of the issues.

The status quo, however, is not an option. India's archaic structure of 17 geographically dispersed single-service military commands would be caught flat-footed in modern conflict. Each command answers to its own service headquarters and maintains an area of responsibility that does not align with those of the other services. A conflict on the western or northern fronts, or at sea, would span the boundaries of several commands simultaneously. Coordinating across these arbitrary lines would consume precious time that modern, fast-moving, AI-guided algorithmic warfare simply will not permit. Theatre commands would replace this cumbersome patchwork with a single commander equipped with the operational authority as well as necessary forces.

The most frequently heard objection concerning air power stems from the Air Force doctrine of "centralised control and decentralised execution". Critics argue that dividing scarce air assets among theatre commanders would disrupt this doctrine. Not true, because theatreisation does not violate this core principle. IAF squadrons and wings would remain in their current locations and need not be parcelled out. Air power would still be controlled centrally and tasked, as required, in a decentralised manner — as at present. The sole change is that control would shift from an IAF commander to the theatre commander. Objecting to theatreisation under the guise of this doctrine confuses the principle itself with the person wielding it. Furthermore, critics disregard the fact that theatre commanders would receive advice and guidance on air power employment from a three-star IAF Component Commander.

America's National Security Act of 1947 had carved an independent air force out of the US Army Air Forces, and created a unified defence establishment, but failed to address the question of "who does what". Open conflict broke out between the services. The US Navy wanted a role in nuclear deterrence and suspected the USAF of coveting naval aviation; the USAF believed that strategic bombing had rendered the navy fleet redundant; and the army did not want the Marine Corps trespassing on its ground role.

> The status quo is not an option. India's archaic structure of 17 geographically dispersed single-service military commands would be caught flat-footed in modern conflict

Defence Secretary (Minister) James Forrestal assembled the joint chiefs at Key West and insisted that they would not disperse till they came to an agreement on their respective roles and missions. The air force took primary responsibility for strategic air warfare. The navy kept carrier aviation and the Marine Corps. The army kept land combat. While the deal did not end inter-service acrimony, the Key West Agreement had established a principle: Service roles and missions would be allocated or re-allocated by mutual agreement, under civilian political authority.

Two decades later, the same principle resolved a different dispute. In Vietnam, the US Army, in addition to owning a fixed-wing tactical transport fleet, had built a large helicopter force and was arming it. The USAF held that fixed-wing aircraft supporting ground troops were its business. In 1966, the two services negotiated and agreed on a swap. The US Army agreed to give up its fixed-wing aircraft in exchange for combat helicopters, while the USAF relinquished its claim to most forms of rotary-wing aircraft.

It is obvious that Indian problems call for India-specific solutions, and it would be foolish to "cut and paste" foreign paradigms on ourselves. But does that mean that we should refuse to learn from others? Or close our eyes to ongoing conflicts, which demonstrate the dizzying transformation in the nature and grammar of war? Ukraine, despite lacking a traditional navy, has crippled Russia's Black Sea Fleet and sunk its flagship, the cruiser Moskva. Iran, with its air force decimated, has leveraged missiles and drones to attack 14 US military bases in West Asia and to contest control of the Persian Gulf. India, on the verge of major weapon acquisition commitments, must not shut its eyes to these momentous developments in warfare.

Britain offers lessons of a different kind. In 2023, Air Chief Marshal Sir Richard Knighton took charge of the Royal Air Force (RAF). An aeronautical engineer by training, he became the first non-pilot ever to head the service. In 2025, he went further still, becoming CDS and professional head of all three services. Earlier, the UK had broken another long-standing tradition by appointing General Sir Gwyn Jenkins, a Royal Marine, as First Sea Lord and head of the Royal Navy. The wisdom of such unconventional choices can be debated, but they reflect open-mindedness, a spirit of innovation and decisiveness on the part of the decision-makers. Contrast this with our own seven-year stasis on theatre commands.

It took the US nearly four decades, and several operational disasters, following the Key West Agreement to achieve true jointness through the Goldwater-Nichols Act of 1986. Given its fraught security environment, India cannot afford the luxury of further procrastination. The path forward requires bold service chiefs willing to break old shibboleths, a resolute CDS who can act as an honest broker-cum-persuader, and a government with a clear-eyed vision, anchored in a formal national security strategy.

The next security crisis will not wait for the services to finish arguing, and a settlement should be reached before it comes.

The writer is a former Indian Navy chief

Beyond midterms, Indian Americans need a new dream



VAMSEE JULURI

HOW MANY Indians make for "too many Indians" in the United States? One more than all the others in the room? Or even just one more than the only other Indian in the room? Many years ago, a housemate selection interview in a campus town in America snowballed into a legal squabble and even a distress sale of the house over a question like this. A graduate student who had rented there for a long time insisted that his Indian housemate could not get any more Indian tenants lest the Whites be overrun, as he rather explicitly insisted, not realising it was against the law to do so.

Now, questions like this are discussed by otherwise seemingly nice American people in places like Texas, where years of online campaigns and complaints about Indians "stealing jobs", shopping in shops, winning spelling bees, and cheering in football games, have become the face of what was once optimistically called "Making America Great Again".

The 2026 US midterm elections may be unfolding around several major issues not unfamiliar to American voters in the past, such as wars and fuel and food prices. But never has the numerically minuscule Indian American population found itself the subject of existential doubt in relation to its future as it has now.

It would be an exaggeration to say that anti-Indian racism will be a key issue on which votes are cast in most of the national or local polls. Nor will the relatively small numbers of Indian-descent voters make a significant impact, perhaps except in certain pockets. Outside the Indian-American diaspora and the Indian media, there is little urgency or awareness about the recent rise in anti-Indian racism. Notwithstanding the fact that there has been some coverage in mainstream media of incidents like the narrowly averted mass shooting at a major Hindu temple in Illinois, the fact remains that anti-Indian racism is not seen as a "thing" for everyone to profess concern about, unlike the protests against the "Muslim Ban" in 2017 or the Black Lives Matter revolutionary zeal of 2020.



In the competitive world of attention for identity-based claims for not just pain and struggle, but just about almost anything, Indians, India, Hindus, are not even in the running. Yet, Indian Americans try so hard to argue on social media that everyone, even Italian and Irish Americans, faced their share of problems in the past. It is comforting to think it's just every immigrant community's rite of passage, before the right to arrival, or acceptance, presents itself.

Meanwhile, one has to live through it, or out-vote it. That seems to be the approach, and no one can fault besieged immigrants for feeling this way.

But what would a MAGA defeat in the midterms, even if it does happen, mean for Indians, for America? Will the genie, as they say, go back in the bottle? Or will another group of motivated actors find in the tropes that have been manufactured around the "Indian American" a useful arsenal to demonise, dehumanise, and disenfranchise once again? A scapegoat that wears the coat that fits without so much as a fight is the most convenient scapegoat of all.

The core issue is that Indians in America haven't confronted the reality of their lot here: That they have no collective control over anything, starting with their image. For a highly visible, and some might say audible, community, we have neither strategy nor ideology, nor story, nor voice. We are status-conscious (with each other), but image-oblivious (beyond each other). We put our best feet forward into schools and careers, but we have never understood that chanting "we can be more American than you Americans" is not exactly endearing, once it stops being amusing.

This is not to say that it is all a failure to self-represent. The resistance to change in the representation establishment is monumental, be it media or academia. But without the effort and the investment in creativity and self-representation, the Indian American will continue to remain, in politics, as in culture, mostly inconsequential. To put it another way, it is time to stop being just the machinery (or worse, a performative mercenary), and start thinking of what it means to be missionary. America can use an altogether new American Dream, and not just a claustrophobic Indian parenthesis in one of its declining old ones.

The writer is professor of Media Studies, University of San Francisco

LETTERS TO THE EDITOR

ECI impartiality

IN STARK contrast to the tenure of T N Seshan and several of his successors, who exercised the powers vested in the Election Commission with firmness and impartiality, the present Election Commission has faced allegations of partisanship and of appearing overly accommodating towards the ruling dispensation ('On institutions, a stark hypocrisy from Congress', *IE*, October 27). The large-scale deletion of names from electoral rolls, particularly when voters are unable to effectively defend their right to remain enrolled, has raised serious concerns about transparency, due process and the right to vote.

Tharcius S Fernando, Chennai

Brazil nailbiter

WINNING AN election by a whisker is the easy part; healing a nation split down the middle is the real mountain to climb ('Lula's return is dramatic, his challenges formidable', *IE*, October 27). While the world celebrates a victory for the left, the narrow margin reveals a deeply fractured society. For the ordinary citizen, political slogans mean little when grocery bills are soaring and household debt is crushing. President Luiz Inácio Lula da Silva must now build bridges with those who voted against him, focusing on practical economic relief.

K Chidanand Kumar, Bengaluru

THE EDITORIAL rightly points out the monumental task awaiting President Luiz Inácio Lula da Silva following his historic fourth-term victory ('Lula's return is dramatic, his challenges formidable', *IE*, October 27). Navigating a deeply divided nation, an uncooperative conservative Congress, and severe fiscal constraints will undoubtedly test his political acumen. However, seeing his narrow victory solely as a potential harbinger of gridlock underestimates Lula's abilities as a pragmatic coalition-builder. As public debt and humble growth projections strictly restrict ambitious social spending, fiscal discipline and progressive reform need not be mutually exclusive.

Sanjay Chopra, Mohali

Clean air needs targets, timelines, accountability



ZERIN OSHO

AFTER SERIOUS heatwaves and deadly deluges, it's time for toxic air to afflict lives and livelihoods in India. Again, till the cycle is forgotten. This seasonal amnesia consistently collides with a revealing policy paradox. In September, the Union government's latest Swachh Vayu Sarvekshan rankings were released. Lucknow was crowned India's best-performing million-plus city. The city deserves credit: Its annual average PM10 levels have fallen from 253 micrograms per cubic metre in 2017-18 to around 135 today. Even then, this is more than double the national safety standard of 60. The country's capital highlights an equally serious malaise: A recent analysis by the Centre for Research on Energy and Clean Air reveals that Delhi has had no appreciable improvement in its winter air quality over the last four years, despite pollution-control measures and activities under the Graded Response Action Plan. Are we missing the wood for the trees?

Swachh Vayu Sarvekshan assesses administrative activity — sweeping roads, managing waste, paving sidewalks and preparing action plans. Actual reductions in particulate matter account for just 2.5 per cent of a city's total score. A municipality can follow procedures, earn national accolades and still have dangerously polluted air.

This is the blind spot in India's clean-air strategy. Under the National Clean Air Programme (NCAP), India has improved its ability to design programmes, allocate budgets and track municipal action. But its policy framework has failed to account for the economic cost of delays in delivering clean air. An assessment by the UN Environment Programme (UNEP) and the Climate and Clean Air Coalition, Hidden Assets, offers a way to understand this cost. South Asia bears the world's heaviest economic burden from air pollution, losing the equivalent of 10 per cent of regional GDP annually through reduced productivity and healthcare costs. Every rupee invested in a package of 25 climate and clean-air measures could yield an estimated Rs 21 in economic and health benefits. The returns include lower hospital bills, fewer missed workdays and improved productivity, alongside the economic value of lives saved and years of healthy life preserved. Even when non-market benefits are excluded, the report estimates a global return of Rs 4 for every rupee invested.

> If Delhi and the NCR meet national air quality standards on schedule from 2026, their cumulative PM2.5 exposure burden could fall by 20 per cent by 2040

If Delhi and the NCR meet national air quality standards on schedule from 2026, their cumulative PM2.5 exposure burden could fall by 20 per cent by 2040. An eight-year delay, reflecting the study's global average, would halve that reduction. Delayed implementation does not merely postpone benefits; it destroys them. A filter installed in 2034 cannot clean the air a child breathed in 2026, nor can a delayed electric bus fleet recover lost workdays or school attendance.

Why do we lose this time? The study identifies institutional fragmentation as a major obstacle across developing nations. Air pollution results from transport, electricity generation, industry, waste management, agriculture and household cooking. These fall under different ministries, departments and urban agencies. When clean air is treated as the responsibility of environment departments alone, coordination suffers, deadlines slip and accountability diffuses.

India has shown that it can manage complex transitions when responsibilities are clear. The expansion of rural LPG connections under the Pradhan Mantri Ujjwala Yojana and the growth of solar power demonstrate its capacity to deliver at scale. Clean-air policy, however, cannot depend on emergency measures and disconnected schemes. As the government considers NCAP 2.0, it must change how success is measured. Clean-air spending should be judged by how much human exposure it reduces, how quickly relief reaches people and which agency faces consequences when deadlines are missed. Central grants and Finance Commission transfers should reward sustained reductions in pollution exposure.

Air pollution's costs are well understood, as are many of the solutions. India's clean-air policy needs not another list of measures, but a stopwatch.

The writer is director, India Programme at the Institute for Governance & Sustainable Development

The many political lives of Benjamin Netanyahu



KHINVRAJ JANGID

ISRAEL VOTED to elect a new government on October 27. Benjamin Netanyahu was, once again, at the centre of the polls. The October 7, 2023 terror attacks by Hamas, the inconclusive wars that followed, the growing criticism of Israel across the world, and the corruption charges against Netanyahu — these were the key electoral issues. That Netanyahu is still in the conversation as a major contender baffles many.

Netanyahu became prime minister for the first time in 1996 and has dominated Israel's domestic politics and foreign policy for the past three decades. So far, he has contested 11 national elections and won six. He has served as PM for over 19 years. That is the longest period in that office. The country's founding prime minister, David Ben-Gurion, served for 13 years. In his long political life, Netanyahu and his party, Likud, have not won a clear majority (61 out of 120 seats in the legislature). He has, however, brought together groups comprising several smaller parties.

The story of Netanyahu's rise and dominance is also the complex story of Israel in the last three decades. He became PM in 1996 following a domestic backlash against the Oslo Peace Process. He advocated no compromise, as he does now, on the part of Israel towards the two-state solution. To him, Palestinian leaders — Yasser Arafat in the past and now Hamas — would use violence against Israelis if they could. He was vindicated when the Oslo process failed due to Arafat's last-hour hesitation in 2000-2001 and the suicide bombing of the Al-Aqsa Intifada led by Hamas in the early 2000s. More than 1,000 Israelis were killed between 2000 and 2005. Since then, Netanyahu has advocated an "Iron Wall" approach and a policy of retaliation rather than compromise with the Palestinian nationalists. According to him, it is only the "strong who survive" in the Middle East.

There is much more to Netanyahu's appeal to his base than war and terrorism. Israel was founded on a strong socialist ethos and till about the 1990s, its economy was heavily centralised, state-controlled and dominated by labour unions (Histadrut). Netanyahu was born in Tel Aviv but spent a significant portion of his adult life in the US, where he studied architecture and business at the Massachusetts Institute of Technology and worked in corporate consulting in Boston. He returned to Israel as a quintessential American who believed in the free-market economy, tax cuts, foreign direct investment, entrepreneurship, and innovation.

> He became PM in 1996 following a domestic backlash against the Oslo Peace Process. He advocated no compromise, as he does now, on the part of Israel for the two-state solution

In the past three decades, Israel has been recognised as a "start-up nation" — a global innovation powerhouse driven by private equity, venture capital, and fintech. After Americanising Israel's kibbutz (socialist) economy, he turned his politics to Israeli society's fault lines. Israel has been deeply divided between Ashkenazi (European-origin Jews) and Mizrahi (Middle East-Asian-origin Jews) and religious conservatives and liberals, doves and hawks, etc. The Likud party before him advocated for the Mizrahi Jews, who were marginalised in Israeli politics, society and cultural-intellectual spaces. Netanyahu caters to ultra-religious elements who do not serve in the army and receive plump subsidies from the state exchequer, as well as those religious Zionists who remain unapologetic about the settlements in the West Bank.

Israel's domestic crisis and external threats do demand more from its leaders than just coalition skills or the Hebrew expression *combina* (*jugaad* in our terms).

The writer is professor and executive director, Jindal Centre for Israel Studies, OP Jindal Global University and founding chair, India-Israel Centre, Delhi

The many wars of Matthew VanDyke

AMERICAN ARRESTED WITH 6 UKRAINIANS

In March 2026, US national Matthew Aaron VanDyke and six Ukrainians were arrested on terror charges. Six months later, with the UAPA charges dropped, VanDyke and the others flew out of the country, raising questions about the man and his affiliations. NIRBHAY THAKUR traces his arc — from motorcycle journeys across the Arab world to his detention in Tihar jail



ILLUSTRATION: SUVAJIT DEY



ON MARCH 13, 2011, a 30-year-old American from Baltimore city was "struck on the head" in an ambush near the Libyan oil town of Brega and woke up a prisoner of Muammar Gaddafi. He would spend the next 166 days in solitary confinement.

Exactly 15 years later, on March 13, 2026, the man, Matthew Aaron VanDyke, was arrested by India's National Investigation Agency (NIA) at Kolkata airport. The same day, six Ukrainians — Hurba Petro, Taras Slyviak, Ivan Sukmanovskyi, Marian Stefankiv, Maksim Honcharuk and Viktor Kaminskyi — were arrested in a coordinated swoop from Lucknow and Delhi airports.

The NIA alleged the seven were part of a group that had entered India on tourist visas, travelled through Assam, and moved into the protected border state of Mizoram. From Mizoram, they allegedly entered Myanmar, where, the agency alleged, they trained banned Indian insurgent groups and supplied them with weapons, including drones, and terrorist hardware from Europe. The charges against them — of conspiring to carry out terrorist activities against India — were grave enough for the NIA to slap the stringent Section 18 of the Unlawful Activities (Prevention) Act against them.

But then, after a little over six months in custody, most of it in Delhi's Tihar Jail, late September, VanDyke and his six Ukrainian co-accused walked out of prison on default bail and took the first flight out to their respective countries.

Then, in an unexpected twist to an already unusual case, VanDyke appeared in a Delhi court on October 23. With the NIA saying it needed three months to probe the terror charges against him, the court, citing VanDyke's compliance, allowed him to leave for the US and return to India in February 2027.

Questions followed, all of which surrounded the man and his affiliations.

Who is Matthew VanDyke? A "mercenary" with a knack for finding himself in dramatic situations in some of the most conflict-ridden regions of the world? A CIA agent, a charge that has followed him everywhere in the last few decades? A "motorcycling, freedom-fighting, filmmaking activist (and prisoner)" — "an accidental warrior", as a 2013 report in the *City Paper*, a Baltimore publication, called him? A "committed pro-democracy activist", as friends and associates describe him?

On his website, the American calls himself a "freedom fighter and prisoner of war in the Libyan civil war", an "award-winning filmmaker", a "war correspondent in Iraq and Afghanistan", founder of Sons of Liberty International (SOLI, "the first military contracting firm run on non-profit principles"), and an "international security analyst".

From all accounts, including *Point & Shoot*, a 2014 award-winning documentary based on VanDyke's journeys, these are labels he has walked in and out of as he turned up in the most unlikeliest of places, from Mauritania to Afghanistan, Iraq, Libya, Syria and now, India and Myanmar. Which is what makes him notoriously hard to tag, and pin down.

Requests by *The Indian Express* for an interview with VanDyke went unanswered.

The boy from Baltimore

VanDyke was born in Baltimore, Maryland, on June 11, 1979, as the only child of Sharon VanDyke, a retired elementary school principal, and Edgar VanDyke, a seafood broker. After his parents divorced when he was three, he was raised by his mother and grandparents in a South Baltimore house that had been in the family for generations, the *City Paper* reported in 2013.

He attended two private schools and took a high school equivalency diploma, before graduating in political science from the University of Maryland, Baltimore County (UMBC), in 2002. It was at UMBC, the report says, in classes taught by the late Middle East specialist Louis Cantori, that he developed a fascination for the Arab world.

Thomas Schaller, one of his professors at UMBC, refused to comment on his former student for this story. In a 2011 interview to the Associated Press, Schaller had described VanDyke as one of his smartest students, someone with a "thirst for life".

The Indian Express reached out to Professor Brian Grodsky, Department Chair of the Political Science Department at UMBC, who said VanDyke left the university "well before my time".

Two years later, VanDyke earned a Master's in Security Studies, with a West Asia concentration, from Georgetown University's Walsh School of Foreign Service.

It was here, he told the *City Paper*, that his fascination for a career in the CIA clashed with his opposition to the Iraq war. "...I had wanted to work for the CIA, to start out as an analyst and then transition into the operations side. But my worldview changed with the Iraq War," he is quoted as telling journalist Van Smith.

In *Point & Shoot,* he talks about how, after failed attempts at finding an alternative career path, in 2007, inspired by Alby Mangels, an Australian adventurer who filmed his 'world safari' journeys, he decided to do something similar — film his motorcycle journeys across West Asia, a region he had specialised in while in university, but never visited.

Between 2007 and 2010, he is said to have travelled across North Africa and West Asia with a camera, from Morocco and Mauritania to Libya, Syria, and later through Iraq and Iran to Afghanistan.

The more he travelled and the more people and friends he made, the farther he went from his goal of making his motorcycle adventure film. It was around this time, his associates say, that he started believing he needed to "be part of revolutions".

By the time he landed in Tripoli, the capital of war-torn Libya, in 2011, he had made friends with Libyans who were fighting against Gaddafi's regime, and plunged straight into the war.

He was captured within weeks and held in a cell in Tripoli's Maktab al-Nasser prison for 85 days, and then in Abu Salim prison for another 81, say reports. For months, the Gaddafi government denied it had him.

With VanDyke missing, his then "girlfriend" Lauren Fischer and mother Sharon VanDyke ran a public campaign to find him, enlisting a Maryland Congressman, Dutch Ruppersberger, to press his case. On May 23, 2011, Ruppersberger held a news conference to draw attention to VanDyke's disappearance.

As rights groups lobbied for his release, the Committee to Protect Journalists (CPJ) counted him among 17 journalists detained or believed to be held by the Gaddafi government, according to a report in the Associated Press.

Then, on August 24, 2011, amid the chaos that had gripped Tripoli, the guards at the Abu Salim facility, where he was kept, fled and he and other prisoners were freed, according to an account on VanDyke's personal website. He refused to go home and enlisted in the rebel National Liberation Army with his Libyan friends and fought in the battle for Sirte, his website says, before returning to Baltimore in November 2011.

After it emerged that VanDyke had been involved with rebel forces, rather than acting strictly as an independent journalist, the CPJ distanced itself from him.

"Matthew VanDyke was identified as a journalist in CPJ's 2011 census based on information provided by his family and news reports regarding his previous work as a journalist. Following the emergence of information about his involvement in combat in Libya, CPJ subsequently revised its assessment," Kunal Majumder, Asia-Pacific Program Coordinator at CPJ told *The Indian Express*. "CPJ does not include individuals who engage in combat in its killed, missing, and imprisoned datasets."

The next war VanDyke went to, he went with a camera. In October 2012, he went to the Syrian city of Aleppo, where he spent about a month filming *Not Anymore: A Story of Revolution*, a short documentary built around two Syrians, the journalist Nour Kelze and a rebel commander fighting the Bashar al-Assad regime.

The Indian Express reached out to Kelze, who is yet to respond.

With Syrian state television branding him a terrorist, VanDyke told the *City Paper*, "it became quite dangerous for me."

In 2014, American director and producer Marshall Curry's *Point and Shoot,* shot from VanDyke's footage in Syria, won Best Documentary at the Tribeca Film Festival in New York.

The same year, VanDyke founded SOLI, a US-registered non-profit that says it provides free military training, advice and supplies to forces fighting authoritarian regimes and terrorists.

Gia Santos, VanDyke's former girlfriend who works with SOLI and recently led the campaign for his release from Tihar, told *The Indian Express,* "Ultimately, SOLI stands for freedom." On the "free military training" that SOLI provides, she said, "Self-defence is important, whether you are defending your home, or defending yourself from an attack by a stranger... But for Matthew, it's about democracy. It's not just about the defence of freedom."

While SOLI claims its first mission was training the Nineveh Plain Protection Units, an Assyrian Christian force fighting in Iraq, in 2018, it worked with a counterterrorism force in the Philippines. Since March 2022, it has trained and supplied Ukrainian forces.

VanDyke has said he also enlisted in the Armed Forces of Ukraine as a combatant. "When he decides to do something, he's going to do it, one way or another... He's usually very involved with a lot of the missions," Santos said.

In January 2025, VanDyke claimed on X that he had been running covert operations with Venezuelan rebels since 2019.

It was this work, training armed groups in other people's wars, that the NIA would place at the centre of its case.

Jailed in India

On March 27, after 11 days of police custody, a special NIA court remanded VanDyke and the Ukrainians in judicial custody, following which they were transferred to Tihar jail on April 6.

According to the NIA's initial remand papers, the accused had entered Mizoram, a protected area, and then crossed the international border into Myanmar.

The NIA alleged that the accused were involved in illegally "importing huge consignments of drones from Europe to Myanmar via India" for the use of "ethnic armed groups" that were targeting the Myanmarese military junta.

The allegations grew stronger in the months that followed. In an application dated August 19, the NIA sought permission to interrogate VanDyke and his Ukrainian associate, Kaminskyi, in Tihar.

"...The Central Government has received credible information indicating the involvement of certain Ukrainian and US Nationals in a drone attack on a civilian aircraft in Myanmar," the NIA said in the application.

While the agency built its case, VanDyke was fighting another battle inside Tihar.

Sources in Tihar's high-security Jail 8/9, where he was lodged in a single cell, say he "wasn't friendly" with other inmates and barely interacted with anyone else.

In an application moved in July before Special NIA Judge Prashant Sharma, VanDyke claimed that "oily" and "greasy" food served in Tihar jail had forced him to go hungry and prompted him to go on strike.

"...the Applicant/Accused is a citizen of America who is not accustomed to the diet ordinarily served in Indian prison, which is predominantly spicy, oily, deep-fried and greasy in nature," the application said, claiming VanDyke lost nearly 30 pounds (14 kg) and developed vision problems.

He also requested a kitchen-like set-up with a list of 19 items so that he could cook for himself. On the list of items he demanded were lentils, protein-rich foods such as red meat, chicken, and fish (shrimp), uncooked noodles, pasta, uncooked rice, potatoes, onions, beans, spices, bread, butter, olive oil, toned milk, soya milk, and bottled water. VanDyke had also asked for an induction cooker/stove, pots, bowls, and a plastic chopper.

Sources said he was granted most of these, including a cook to meet his special diet needs.

Outside, a familiar campaign was under way. Fifteen years after Libya, his mother Sharon fought the same campaign. During his months in Tihar, the family issued statements through his X account and through his organisation, wrote to the US Embassy and pressed American lawmakers.

"The family of @Matt_VanDyke seeks urgent U.S. diplomatic intervention as he is presently still denied basic detainee rights, and is being kept in solitary confinement at Tihar Jail 8/9 in Delhi, India. Matthew is innocent of all charges against him. Throughout his career, he has documented human suffering and provided humanitarian assistance to people affected by conflict and crisis. It is time to bring #MatthewVanDyke back home," a September 2 tweet on his X account read.

"You have to know Matthew to understand why he does what he does," Sharon VanDyke said in an interview in May, according to a post on X by VanDyke's former girlfriend Santos, who handles social media for SOLI and has issued statements on the family's behalf.

Santos told *The Indian Express*, "Matthew has not talked about the conditions inside the cell. I think that's a conversation that he has had with his mom, rather than with me. He got a five-minute emergency call (while in jail) per month, which he used to call his mom. She did mention a few things to me. I think he told her that he made a friendship there, a friend or two."

VanDyke flies out

Then came September 8, the 180th day of the custody of VanDyke and the six Ukrainians, by which time the NIA had to file a chargesheet in the special court.

When it did so, the agency invoked only Sections 21 and 23 of the Immigration and Foreigners Act, 2025, offences that can be compounded before the Foreigners Regional Registration Office (FRRO). There was no mention of the terror charge, though the FIR was registered under Section 18 of the UAPA (punishment for being part of a terrorist conspiracy). The NIA told the court it needed more time to finish the investigation into the terror charges.

An official of the NIA told *The Indian Express,* "The investigation is still ongoing. The chargesheet that has been filed is not a final chargesheet."

With no UAPA in the chargesheet filed within the statutory 180 days, on September 18, VanDyke and the Ukrainians were granted default bail.

The court called the chargesheet "piecemeal" because it covered only the immigration offences while the UAPA probe was on.

The seven accused were subsequently discharged in the Foreigners Act case after the FRRO compounded the offences and imposed a penalty of Rs 5.5 lakh on each of them.

Next came the plea to go abroad. The seven asked for six weeks to return to their countries and meet their families, a plea the court allowed on September 24 on the condition that they return in a month.

"The right to travel abroad is an extension of fundamental rights under Article 21 of the Constitution... which cannot be taken lightly... and a balance has to be struck," the court said.

Though the case has not formally ended — the NIA can still file a supplementary chargesheet if it establishes UAPA offences — the agency told the court that the physical presence in India of VanDyke and the others would not be needed in the near future to complete the investigation.

On September 25, VanDyke and the others flew out of India.

Less than a month later, on October 23, VanDyke was back in India, stunning those who said he wouldn't show up.

Santos said, "Even the court agreed that you can show up virtually... But he felt it was important that he showed up. He has nothing against India. Everything that was done was done, not against India, and I would say, and I would even dare to say, was in support of India."

That day, dressed in a formal white shirt and black trousers, he walked into Judge Sharma's courtroom at Delhi's Rouse Avenue Court, with a beige envelope in his hand. He told the court that he wanted legal aid counsel as he didn't have money to pay a private lawyer. He also filed an application in court seeking the release of his seized personal items.

The same day, the court extended till February 24 the permission granted to VanDyke and six Ukrainians to remain abroad. The six Ukrainians did not return to India. The court had granted their appeal for an extension of their stay abroad.

A day later, on October 24, VanDyke flew out of India.

With inputs from Alok Singh, New Delhi

> **"Matthew has not talked about the conditions inside his cell in Tihar. He got a five-minute emergency call (while in jail), which he used to call his mom."**
> **GIA SANTOS,** VANDYKE'S FORMER GIRLFRIEND





(Below, left) VanDyke at Delhi's Rouse Avenue Court; with his former girlfriend Gia Santos
ANI VIDEO GRAB

VANDYKE'S JOURNEYS

- **2006: Spain** Stayed for eight months before launching his motorcycle journeys
- **2007: Morocco** Kicked off his motorcycle journey across the Arab world from here, before travelling through Mauritania, Tunisia, Libya, Jordan, Syria, Turkey and Egypt between 2007 and 2009
- **2009: Iraq** Embedded with US forces as a correspondent for *The Baltimore Examiner*
- **2010: Afghanistan** Reached Bagram in November and was embedded with US forces
- **2011: Libya** Arrived in Benghazi on March 6, was captured on March 13, escaped on August 24, rejoined rebels
- **2012-13: Syria** Filmed *Not Anymore: A Story of Revolution* in Aleppo and released it
- **2014: Iraq** Returned to Iraq in 2014 when SOLI started working there
- **2018: Philippines** Reached the Philippines where SOLI was working with a counterterrorism force
- **2019: Venezuela** Conducted covert operations with rebels
- **March 2022: Ukraine** Enlisted in the Armed Forces of Ukraine as a combatant
- **2025-26: Myanmar** NIA alleges VanDyke and six Ukrainians entered Myanmar from Mizoram and trained armed groups

AS DOHA STEPS UP DARK TRANSITS THROUGH HORMUZ

LNG imports from Qatar rise to eight-month high in Oct

Sukalp Sharma
New Delhi, October 27

QATAR BECAME the second largest supplier of liquefied natural gas (LNG) to India in October, a comeback the Gulf nation scripted by aggressively using tactics like switching off the LNG tankers' transponders, or "going dark", to avoid detection and capitalising on windows of opportunity based on maritime security assessments in the Strait of Hormuz.

Doha's increased risk tolerance follows similar tactics being used by the UAE for a few months now to ship its LNG through the fraught waters of the strait. Additionally, industry sources indicated that ship-to-ship (STS) transfers are also being used by Qatar to move LNG beyond the strait.

Qatar was only second to the US in terms of LNG supplies to India in the October 1-25 period, when overall import volumes grew sequentially as well as on a year-on-year basis. The gulf nation has traditionally been India's top source of LNG, but the disruption in vessel movements through the Strait of Hormuz led to a crash in supply volumes starting March.

India got 0.44 million tonnes of Qatari LNG till October 25, up nearly 370% from volumes imported in all of September, according to provisional data from commodity market analytics firm Kpler.

In March-September, LNG imports from Qatar averaged just 0.07 million tonnes, just a fraction of the 2025 monthly average of 0.95 million tonnes.

STS transfers have already emerged as a key ploy for Gulf producers to move oil out of the Persian Gulf. Unlike regular operations, in which crude is loaded onto tankers that sail directly to the destination port, STS transfers involve a shuttle tanker that carries the oil for some distance, after which the cargo is transferred to another tanker.

In STS operations in the Strait of Hormuz, the supplier usually takes on the responsibility — and the risk — of sending the oil through the strait, after which a tanker waiting in safer waters takes the oil to its destination. STS is not that common in LNG flows as the process is a lot more complex than transferring crude from one tanker to another. Super-chilled gas requires cryogenic hoses to be transferred, and requires much more careful handling. However, in the absence of any alternative route to evacuate export volumes, Qatar is evidently resorting to STS transfers ahead of the northern hemisphere winter, when demand jumps globally. "Qatari LNG deliveries to India are at their highest monthly level since the conflict began...For India, a sustained recovery in Qatari supply could ease the pressure to source replacement cargoes from other suppliers, particularly as underlying import requirements remain firm despite elevated prices," said Sonal Ranjan, LNG and natural gas analyst at Kpler.

Robust LNG demand in India has led to Indian importers competing hard to pick up cargoes from the spot market at super-normal prices, even as some of the other major Asian LNG buyers have curtailed imports.

The West Asia crisis has pushed India to secure cargoes from non-hormuz dependent supply sources, as New Delhi has been prioritising supplies over price considerations.

The US was the top LNG supplier to India in the October 1-25 period, reclaiming the pole position after losing it to Oman in September. FULL REPORT ON WWW.INDIANEXPRESS.COM

• India's LNG imports from Qatar in 2026

Month	Volumes (million tonnes)	Share in India's LNG imports
January	1.05	40.9%
February	0.74	39%
March	0.06	3.6%
April	0	0%
May	0	0%
June	0.13	5.3%
July	0.09	4%
August	0.09	3.4%
September	0.09	4.2%
October (till Oct 25)	**0.44**	**17.6%**

SOURCE: KPLER

SUCCESSION BATTLE: MALLIKA, DAUGHTER LAKSHMI VENU SEEK AMICABLE SOLUTION

TVS family files caveats in courts

While Venu and his son Sudarshan are in one camp, his wife Mallika and daughter Lakshmi are on the other side

George Mathew
Mumbai, October 27



Four caveats each have been filed in the City Civil Court and the Commercial Court in Chennai. X

TRACTOR FARM Equipment Ltd (TAFE) Chairman and MD Mallika Srinivasan and her daughter Lakshmi Venu on Tuesday expressed their desire for an amicable family settlement through transparent discussions and dialogue, even as members of the TVS family filed caveats against one another in two Chennai courts amid an ongoing dispute over the division of the family's wealth.

Venu Srinivasan, chairman emeritus of TVS Motor Company, his wife Mallika Srinivasan, and their children Lakshmi Venu and Sudarshan Venu have filed several caveats on October 12 and 13.

Four caveats each were filed in the City Civil Court and the Commercial Court in Chennai, indicating that the family members are preparing for possible legal proceedings as the dispute continues.

While Venu Srinivasan and son Sudarshan Venu are on one side, Srinivasan's daughter Lakshmi Venu and wife Mallika Srinivasan are on the other side.

The filings place members of the family on opposing sides as they seek to safeguard their interests in the event of further court proceedings.

In a statement, a spokesperson reiterated the position taken by Mallika Srinivasan and Lakshmi Venu on resolving the differences amicably.

"As stated earlier in the joint statement, Lakshmi Venu and Mallika Srinivasan reiterate their desire for an amicable resolution through transparent discussions and dialogue," the spokesperson said on Tuesday.

The statement signals that Mallika Srinivasan and Lakshmi Venu continue to favour discussions as a way to settle the dispute. However, the caveat filings suggest that the parties are also taking legal precautions in anticipation of potential proceedings. The filings in both the City Civil Court and the Commercial Court indicate that the parties are preparing to protect their respective positions should the matter come before the courts.

A caveat is a legal notice filed by a person who wants to be heard before a court passes an order on an application that may affect their interests. Such a filing generally seeks to ensure that the court gives the caveator an opportunity to present their position before passing an order without hearing them.

The larger TVS family partition, agreed upon in 2020 and implemented subsequently, was carried out through a process involving the relevant stakeholders, Lakshmi and Mallika said in a joint statement earlier this month.

They, however, maintained that the same process has not taken place for the economic interests within the Venu Srinivasan family.

"The fundamental issue is not about management positions which have been compensated appropriately and commensurately. It is about the fair recognition of rightful economic ownership, which remains unresolved," they said.

Lakshmi is the Vice Chairman of TAFE.

She is also ED-MD of Sundaram-Clayton. Sudarshan Venu is Chairman and MD of TVS Motor. TAFE forms part of the Amalgamations Group, a separate family business group in which Mallika Srinivasan is a shareholder. TAFE has no bearing on the economic settlement within the Venu Srinivasan family and should not be conflated with it, Mallika Srinivasan said.

Maruti Suzuki India Q2 profit falls 26% amid rising input costs

New Delhi: Car market leader Maruti Suzuki India Ltd on Tuesday reported a 26.36% decline in its consolidated net profit for the second quarter ended September at Rs 2,466.1 crore, due to higher input costs resulting from the West-Asia conflict even as the revenue rose sharply, driven by record quarterly vehicle sales volumes.

The auto major had posted a net profit of Rs 3,349 crore in the same quarter of the previous fiscal, a regulatory filing to the exchanges showed.

During July-September, total revenue from operations increased to Rs 53,355.5 crore as against Rs 42,344.2 crore in the same period of 2025-26 fiscal, Maruti Suzuki India said in the filing.

Total expenses in July-September also shot up to Rs 50,619 crore against Rs 39,018.4 crore in the year-ago period, the company said. Cost of materials consumed in the second quarter rose to Rs 37,488.5 crore from Rs 25,324.2 crore in the corresponding period last fiscal, it added.

Maruti Suzuki India said the Operating Profit (EBIT) in the quarter stood at Rs 2,803.7 crore as compared to Rs 3,382 crore in Q2 FY25-26 owing to West Asia-conflict-linked commodity price rises. **PTI**

• Indian businesses face compliance gaps

Physical audits across 52 sites in 17 states and Union Territories found 4,694 non-compliances, averaging 90 per site, said a report by TeamLease RegTech.



70% carried the risk of penalty or prosecution — 3,306 of 4,694

46% carried the risk of imprisonment — 2,166 of 4,694

29% named directors or senior officers — 1,378 of 4,694

31% involved fines that could escalate — 1,457 of 4,694

60% were classified as Critical or High risk — 2,592 of 4,332 rated

92% came from environment and labour laws — 3,086 + 1,219

- Compliance scores ranged from **61%** at warehouses to **79%** at manufacturing plants, with registered offices at **75%** and branch offices at **70%**.
- Indian laws can hold directors, senior officers, factory occupiers, and managers personally responsible for compliance.

SOURCE: TEAMLEASE REGTECH REPORT - HIDING IN PLAIN SIGHT: COMPLIANCE AUDIT INSIGHTS 2026

Funds with limited China link may get easier access

Mukesh Jagota
New Delhi, October 27

THE GOVERNMENT is considering easing paperwork requirements for investment funds with less than 10% ownership by investors from countries sharing a land border with India (LBCs), a senior official said Tuesday. The proposed changes would involve modifying forms to remove disclosure requirements for information that is not necessary, the official said.

In March, the government amended Press Note 3 of 2020 through Press Note 2 of 2026, allowing investments from entities and funds with beneficial ownership of 10% or less by investors from LBCs to come through the automatic route, provided there is no management control or ultimate effective control by such investors. The countries covered by the restrictions are China, Pakistan, Bangladesh, Myanmar, Nepal, Bhutan, and Afghanistan. Between March and August 29, investment proposals worth Rs 4,895.65 crore came into India under the relaxed provisions. **FE**

• BRIEFLY

India, Mexico finalise trade pact terms

New Delhi: India and Mexico will formally launch negotiations for a preferential trade agreement (PTA) with the signing of the Terms of Reference (ToR) during Commerce Secretary Rajesh Agrawal's two-day visit to Mexico City beginning October 26. Commerce and Industry Minister Piyush Goyal said Mexico is keen on an early-harvest arrangement to liberalise trade in selected goods faster. "Mexico is very keen to have an early harvest," Goyal said in The Hague. **FE**

ACC Q2 profit slumps 92% amid sales volume dip

New Delhi: ACC Ltd, an Adani Group cement firm, on Tuesday reported 91.7% fall in consolidated net profit to Rs 93 crore for September quarter FY27, on account of decline in sales volume due to a Master Supply Agreement with the parent entity. The company had posted a profit of Rs 1,119 crore in the July-September period, according to a regulatory filing from ACC, a subsidiary of Ambuja Cements. **PTI**

Cipla Q2 net profit falls 35% to Rs 877.5 cr

New Delhi: Cipla on Tuesday reported a 35% decline in consolidated net profit for Q2 ended September at 877.54 crore, as revenue fell marginally while expenses grew. It had posted a net profit of Rs 1,351.17 crore in same period a year ago, showed a regulatory filing. **PTI**

JLR India begins local production of Defender 110

Mumbai: Jaguar Land Rover India on Tuesday said it has started production of the Defender 110 at its Pune facility to cater to its local customers, thereby reducing prices by up to Rs 34 lakh for the fully loaded top-end version. The company said it expects up to a 20% uptick in sales volumes. **PTI**

Japan pitches Rs 8-10 lakh cr investments in India

Prasanta Sahu
New Delhi, October 27

A 32-MEMBER Japanese industry delegation led by the Japan Chamber of Commerce and Industry (JCCI) and Mitsubishi corporate adviser Ken Kobayashi met top policymakers here, pitching investments to the tune of Rs 8-10 lakh crore in India's infrastructure and manufacturing sectors over the next few years.

The commitment comes as India scouts for durable capital and seeks to stem capital outflows. The group's visit also coincides with the Asian country emerging as India's top source of foreign direct investment in Q1FY27, pipping conventional source countries like Singapore, Mauritius and the US. During the interactions, the delegates sought faster clearances for projects, tax predictability and a larger pool of skilled manpower, official sources said. The proposed investments span several sectors, including automobiles, manufacturing and new high-speed rail networks. **FE**

CBIC issues circulars to simplify GST reforms

Aanchal Magazine
New Delhi, October 27

FOLLOWING THE latest decisions of the Goods and Services Tax (GST) Council, the Central Board of Indirect Taxes and Customs (CBIC) issued eight circulars focusing on simpler registration with a list of required documents, export payments and clear guidelines for raising tax demands with focus on pre-show cause notices and proving the intent of fraud before invocation of charges.

Citing an analysis of GST registration applications, including the reasons for rejection and the nature of queries raised during processing, the CBIC said that delays or rejections were often attributable to certain deficiencies in the applications including non-furnishing of requisite information or documents; submission of incorrect, incomplete, or inconsistent details, or uploading of documents that are not clearly legible. Stating that such issues are commonly observed in respect of identity details of the applicant, proof of principal place of business, the CBIC directed tax officers to refrain from seeking unwarranted documents or raising presumptive queries not relevant to GST registration applications. "While there is a need to exercise due diligence in processing registration application to prevent GST registration of being obtained by unscrupulous and fraudulent elements for passing on input tax credit (ITC) without any underlying supply, at the same time, it is also important to ensure that genuine applicants seeking registration are able to complete the process without undue inconvenience," the CBIC said in the circular dated October 26.

For premises taken on rent or lease, the applicant is required to upload a clear and legible copy of the valid registered rent or lease agreement and no other document is required. If the rent or lease agreement is not registered, then an applicant has to upload the latest copy of any one of the documents in the name of the landlord such as the property tax receipt, municipal khata, property identification document, electricity or water bill along with the rent agreement. Under GST, suppliers exclusively dealing in goods, with annual aggregate turnover of Rs 40 lakh are required to register, while for suppliers in the supply of goods and services both or supply of services only, the threshold is Rs 20 lakh.

"It is, therefore, in the interest of the applicant that he opts for and undergoes authentication of Aadhaar number...to get his application for registration processed at the earliest," it said.

For issues related to demand, adjudication and appeal proceedings under the Central GST (CGST) Act, the CBIC said there has to be a uniform reference framework for officers engaged in quasi-judicial proceedings and consistency, transparency and uniformity in the implementation of provisions of law across field offices. The circular stated that pre-show cause notice has to be issued to taxpayers, wherever feasible, as it offers them a "vital opportunity to clarify their position prior to formal proceedings". FULL REPORT ON WWW.INDIANEXPRESS.COM

Adopt prudent borrowing strategies: RBI chief to states

Mumbai: Central bank Governor Sanjay Malhotra on Tuesday advised state governments to adopt prudent borrowing strategies and ensure quality spending, highlighting the importance of long-term fiscal health.

Addressing the 36th Conference of State Finance Secretaries, the governor also advised states to make effective use of the State Level Bankers' Committee forum. The Conference was attended by the finance secretaries of 27 States and three Union Territories as well as senior officials from the Union Ministry of Finance, Controller General of Accounts. **PTI**

IRDAI to implement distribution reforms only after consensus: Seth

New Delhi: Amid concerns over the impact of the proposed changes in insurance distribution, IRDAI Chairman Ajay Seth on Tuesday assured the industry that the regulator will implement the reforms only after reaching a consensus.

Speaking at the annual Business Standard BFSI Insights Summit here, Seth said the regulator will work to expedite claims in case of health policies. Seth said he has been meeting people extensively since the release of the discussion paper on distribution reforms to hear out the industry's concerns. **PTI**

• MARKETS

Sensex	NIFTY	Gold ▼	US Dollar ▼
73,598.67	22,749.75	₹1,41,431	₹95.12
-8.08	-3.45	Silver ▼	Oil ▲
-0.01%	-0.02%	₹1,92,499	$123.72

NOTE: GOLD, SILVER RATES AS PER INDIA BULLION AND JEWELLERS ASSOCIATION DATA GOLD PER 10G, SILVER PER 1 KG; CRUDE OIL (INDIAN BASKET) AS OF OCTOBER 26, 2026

JAIPUR DEVELOPMENT AUTHORITY
Indira Circle, Jawahar Lal Nehru Marg, Jaipur-302004
No. JDA/EE/DR/2026-27/D-607 Date : 26-10-2026
NOTICE INVITING BID
NIB No.: **EE (DR) /10/2026-27**
Online Bids are invited up-to 06:00 PM of 16.11.2026 for **"Development, Operation and Maintenance of Dravyavati Sports Complex, Jaipur on Design, Build, Operate and Maintain (DBOM) Basis"**. on License basis for Five years. The last date for applying Bid and making online payment on JDA portal is up-to 6.00 PM of 16.11.2026. The estimated cost of NIB is Rs. 759.06 Lacs. Details may be seen in the Bidding Document at our office or the State Public Procurement Portal website www.sppp.rajasthan.gov.in, www.eproc.rajasthan.gov.in and www.jda.rajasthan.gov.in/jda
(UBN No. : JDA2627WLOB00394)
To participate in the bid, bidder must:
A. Participate in Tender & Deposit Payment on 'Online Tender Participation' Portal of JDA at https://jda.rajasthan.gov.in/jda or by Single-Sign-On at http://service.jaipurjda.org.
B. Submit e-Bid on e-Procurement portal of GOR at www.eproc.rajasthan.gov.in
Raj.Samwad/C/26/12511 **Executive Engineer- DR**

SBI Premises & Estate Department - Local Head Office
16, College Lane, Chennai-600006
Tel: 044 28308401/12/16
SBI invites application/tender for the following works:
1. Application for the selection of Project Management Consultant for Construction of Office & Residential buildings at Stephenson Road, Perambur, Chennai on EPC basis at an estimated cost of ₹148 Crores.
2. Tender from contractors for the Heritage restoration works of Chennai Main Branch Building (Grade A) at Rajaji Salai, Chennai at an estimated cost of ₹13.18 Crores.
For further details, log on **https://sbi.bank.in/web/sbi-in-the-news/procurement-news**
Corrigendum, if any, will be published only in website. Last date for submission: **02.12.2026**
Chennai
Date: 28.10.2026 AGM (P&E)

Rajasthan State Road Development And Construction Corporation Ltd., JAIPUR.
No. NIT/2026-27/8772-83 Date: 26.10.2026
अल्पकालीन ई-निविदा सूचना संख्या 439/2026-27
निम्नलिखित परियोजनाओं पर पथकर वसूली हेतु ई-टेन्डरिंग प्रक्रिया से ऑनलाईन निविदा आमंत्रित की जाती है:-

कार्य का विवरण	कार्य की कुल अनुमानित लागत (रु.)
Selection of Bidder for Collection of User Fee on the basis of competitive bidding through e-procurement basis for the following:-	
On Bharatpur-Deeg-Alwar Road for a period of 01 year. **UBN: RRC2627SLOB00722**	**4510.38 Lakh**
On Nasirabad-Kekri-Deoli BOT Road'' for a period of 01 year. **UBN: RRC2627SLOB00721**	**3884.11 Lakh**

निविदा से सम्बन्धित प्रपत्र में निविदा शुल्क, धरोहर राशि, डाउनलोड करने व खोलने की तारीख सहित सम्पूर्ण विवरण एवं संशोधन वेबसाईट: **http://eproc.rajasthan.gov.in**, **http://sppp.rajasthan.nic.in** तथा **http://pwd.rajasthan.gov.in/rsrdc** पर देखा जा सकता है। इच्छुक संवेदकों को अपने डिजिटल हस्ताक्षर के माध्यम से वेबसाईट **http://eproc.rajasthan.gov.in** पर रजिस्टर्ड करवाना आवश्यक है। महाप्रबंधक

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CONSTRUCTION & MAINTENANCE GROUP, SDSC – SHAR
SRIHARIKOTA – 524124
Brief E-TENDER NOTICE
e-Tender Notice No.CMG/C/CON/268722 Date: 22/10/2026
On behalf of President of India, EPC tenders are invited through e-tendering for the following works:

Brief Name of work	Est. Value (Rs.)
Planning, Design, Construction, Commissioning of SHAR Recreation Facility (Indoor Sports complex, Club building with Swimming pool, Play area) at SDSC SHAR Sriharikota, Tirupati District of Andhra Pradesh (Architectural, Civil, Structural, PH, Road, Site Development works, Electrical, AC, and allied works in EPC MODE- 1)	971.33 Lakhs

Last date for sale (Tender documents can be downloaded) upto **18/11/2026 14:30 hrs**. For eligibility criteria and other details, interested tenderers may please refer to the detailed bilingual (Hindi-English) Notice Inviting Tenders (NIT) on the website **https://www.isro.gov.in/Tenders.html** and tender free view at **https://www.tenderwizard.com/isro**
Sd/- GROUP HEAD, CMG/ SDSC SHAR

OFFICE OF THE ENGINEER-IN-CHIEF (CIVIL), ODISHA
NIRMAN SOUDHA, KESHARI NAGAR, UNIT- V, BHUBANESWAR - 751 001
1st corrigendum to Bid Identification No.- CE-BRIDGES-18/2026-27
34001/1059/2627
The following changes are made to the Invitation for the work "Improvement such as widening and strengthening of Dhenkanal Tarava road from 0.0 to 7.751km in the District of Dhenkanal for the year 2026-27" vide **Bid Identification No. CE-BRIDGES-18/2026-27.**
- The bid documents will be available in the website **www.tendersodisha.gov.in from 10.00 A.M of Dt. 03.11.2026 to 05.00 P.M of Dt. 18.11.2026** for online bidding.
- The Last date of submission of tender is extended **upto 5.00 PM of Dt. 18.11.2026.**
- The Bids received on line shall be opened at **11.30 AM on Dt. 19.11.2026.**
All other terms and conditions remain unchanged
Sd/-
Chief Engineer, Bridges-I
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GLOBAL

Israel polls: How its electoral system works and government is formed

Moinuddin Ahmad
New Delhi, October 27

ABOUT 7.3 million Israelis were eligible to vote on Tuesday to elect the 26th Israeli Knesset (parliament). As many as 38 registered parties are competing for seats in the 120-member legislature, though only around 11 are projected to clear the strict 3.25% electoral threshold required for parliamentary representation.

This is the first Israeli parliament since 1988 to complete a full four-year mandate. The vote follows years of intense societal turmoil, including contentious judicial reform debates, the security crisis following October 7 and protracted wartime conditions. Beyond choosing a prime minister, this election is expected to be a referendum on Israel's governance, domestic civil cohesion, security architecture and long-term democratic character.

The electoral system

Being a democracy with a proportional representation system of elections, Israel has several lists and parties. The difference between parties and lists is that a party is an institution that seeks power within the established rules of elections, whereas a list is precisely what it says it is: a list of candidates prepared for the elections sponsored by a party or by a group of parties.

Any registered party or list may contest elections. Under Section 7A of Basic Law: The Knesset, the Central Elections Committee (CEC), or the Supreme Court may disqualify a political party list or an individual candidate if their platform or actions express denial of the existence of the State of Israel as a Jewish and democratic state, indulge in racism, or support armed struggle by an enemy state or terrorist organisation against Israel.

Parliamentary regime

Israel is a parliamentary democracy with three main branches of power: the legislative, executive, and judiciary.

The country has a unicameral (single-house) parliament, composed of 120 members. Members of the Knesset are elected nationally for four-year terms.

The PM holds the executive power. The government depends directly on the confidence of the Knesset and must maintain a working majority (at least 61 seats) to govern. Headed by the Supreme Court, the judiciary acts independently to interpret basic laws and review legislation. National elections are administered and overseen by the CEC.

Electoral threshold

In Israel's party-list proportional representation system, the electoral threshold is the minimum percentage of the total nationwide vote a political party must receive to enter parliament. The threshold is currently set at 3.25% — a standard established by Knesset legislation in 2014. Crossing this hurdle grants a party a baseline of at least four out of the 120 total Knesset seats. If a party fails to reach the 3.25% mark, all votes cast for its slate are discarded, producing "wasted votes" that are reallocated among the parties that succeeded.

The main purpose of the threshold is to balance representation with political stability by preventing extreme parliamentary fragmentation. Historically, the threshold started at just 1% in 1951 before being gradually raised to 1.5% (1992), 2% (2003), and finally 3.25% (2014), notes Prof Ofer Kenig, a researcher at the Israeli Democracy Institute.

This high barrier incentivises smaller ideological factions to merge into joint slates before election day. This plays a decisive role in shaping coalition arithmetic, he adds.

Government formation

Since no single political party in Israel's history has ever won a 61-seat majority on its own, every Israeli government has been a coalition. In such a situation, the process of forming a government, with both old and new allies, takes time.

Following election day, the CEC certifies the final count and seat distribution. The President holds discussions with representatives of party lists that cleared the electoral threshold regarding the possible PM candidates. After discussions with party lists, the President grants the mandate to form a government to the party candidate who is most likely to ensure a 61-seat majority.

The President grants 28 days to the chosen candidate to form a coalition. A single 14-day extension, if required, can be given to the candidate. If one candidate fails to get the required support, the President can either transfer the mandate to a second candidate for a 28-day attempt.

But what if there is a gridlock between the top two lists? Though this situation comes with its own complexities, simply speaking, a caretaker government, under the current PM, steps in until the dates for the next elections are announced.

THE KEY 'LISTS' IN ISRAEL ELECTIONS

Government coalition & right-wing blocs

Likud: Led by PM Benjamin Netanyahu, running on a consolidated national-conservative list that merged with Gideon Sa'ar's New Hope.

Otzma Yehudit: A far-right party list headed by Itamar Ben-Gvir.

Religious Zionist Party – Zehut: A joint list led by Bezalel Smotrich (Religious Zionism) and Moshe Feiglin (Zehut).

Shas: Ultra-Orthodox Sephardic party list led by Aryeh Deri.

United Torah Judaism: Ultra-Orthodox Ashkenazi joint list between Degel HaTorah and Agudat Yisrael, led by Ya'akov Asher.

Amcha Yisrael: A new right-wing list formed by former Israel Defense Forces (IDF) general Ofer Winter and activist Yoseph Haddad.

Noam: A far-right, religiously conservative list headed by Avi Maoz.

Opposition and centre-left blocs

Together (Beyachad): A centre-right and centre joint list combining Naftali Bennett's new movement with Yair Lapid's Yesh Atid party.

Yashar!: A broad centrist list led by former IDF Chief of Staff Gadi Eisenkot and former Shin Bet chief Yoram Cohen.

The Democrats (HaDemokratim): A merger between the Labor Party and Meretz, headed by Yair Golan.

Yisrael Beitenu ("Israel [is] Our Home"): A secular right-wing party list led by Avigdor Liberman.

Blue and White (Kahol Lavan): A centrist list headed by Benny Gantz.

The Reservists & The Economic Party: A list formed by Yoaz Hendel (The Reservists) and economist Yaron Zelekha (New Economic Party).

Arab sector parties

The Joint List: A united electoral list bringing together the Hadash, Ta'al, and Balad factions, headed by Yousef Jabareen and Ahmad Tibi.

United Arab List (Ra'am): An Islamist Arab-Israeli party list headed by Mansour Abbas.

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HEALTH

The risks of food colouring, as UP steps up scrutiny

Maulshree Seth
Lucknow, October 27

BRIGHT RED chutney served with samosas, pink cotton candy sold outside schools, vivid red tandoori chicken — food colourings have come under scrutiny in Uttar Pradesh after authorities found non-food grade industrial dyes in chutney. Amid the festive season, with Diwali approaching, the state's Food Safety and Drug Administration has issued detailed guidelines about where and how food colours can be used, which ones cannot be used, and how vendors must measure and account for the colours they buy.

What's under the scanner?

For street-food lovers, one of the most direct changes concerns the green and red chutneys served with *samosas*, *chaat*, *momos* and rolls. The guidelines prohibit adding colours to chutney and advise vendors to use ingredients such as tomatoes, beetroot, coriander and mint to achieve the desired colour and flavour.

Cotton candy and ice lollies have also been included. The use of non-food colours, particularly Rhodamine-B, is prohibited. This industrial dye is used in textile and paper colouring and cannot be used as a substitute for food-grade colour. The same restriction applies to the use of other industrial dyes to give a bright red appearance to chicken *tikka*, *kebabs*, *chaap* and fried fish. Vendors have been advised to use suitable food ingredients, including Kashmiri red chilli and degi mirch, for colour and flavour.

How widespread is use of Rhodamine-B?

A food safety officer had earlier told *The Indian Express* that Rhodamine B is usually reported from roadside vendors in small cities. "Small vendors are not aware that this dye can be harmful as effects might not always be felt immediately," the officer had said. "Although no colouring is allowed in cooked food, in the bigger cities usually edible food colours are used to give the red colour in butter chicken and tandoori chicken."

What risks do prohibited dyes in food pose?

The guidelines list several prohibited industrial dyes, including Rhodamine-B, Metanil Yellow, Butter Yellow, Malachite Green, Auramine, Orange II and Sudan dyes. Their suspected illegal uses range from giving a bright pink or red appearance to cotton candy, chutney and sweets to making turmeric, pulses, chilli powder and other spices appear more vibrant. Sudan dyes have also been associated with adulteration of edible oils and packaged sauces. Their consumption can pose several health risks, varying by substance and level of exposure.

The use of Rhodamine B in food for a long time, for instance, could lead to liver dysfunction or cancer. When exposed to large amounts over a short period, it results in acute poisoning. Tartrazine is a synthetic yellow food dye and has been indirectly linked to hives, food allergies like swelling of the lips, tongue, throat and neck. Carmoisine, a red dye, can trigger hypersensitivity reactions, including skin swelling, breathing difficulties and hives.

Can artificial colours be used in sweets and cakes?

Yes, under the Food Safety and Standards (Food Products Standards and Food Additives) Regulations, 2011, but only when the colour is permitted for the particular food category and the prescribed limit is followed.

Colour permitted in a cake cannot automatically be used in bread, chutney or another product. This is because colours serve different purposes in different foods. Their safety also depends on how much quantity is consumed and how the colour behaves during processing. For instance, the FSSAI says that assessing a colour's use in deep-fried snacks may require information on its heat stability and the formation of by-products.

Natural colours, too, are subject to category-specific conditions.

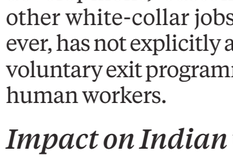
WHAT THE LAW SAYS

- The Food Safety and Standards Act of 2006 provides for punishment for sub-standard, misbranded and unsafe food.
- Depending on the violation, the penalty may range from a fine of Rs 3 lakh to imprisonment up to six months.

TECHNOLOGY

The message in Microsoft exit offer for 60,000 staff

Microsoft has not linked the job cuts to AI, but they come amid growing concerns over AI-driven job losses, particularly in the technology sector



SOUMYARENDRA BARIK

MICROSOFT, WHICH employs around 23,000 people in India, has extended to the country a global voluntary exit programme covering approximately 60,000 employees.

People in India working in roles across Copilot, AI experiences, Windows and Devices, Xbox, finance and human resources could be affected by the move.

The development comes amid increasing concerns over AI-led disruptions to employment, particularly in the technology sector, where companies are deploying AI tools to automate tasks traditionally performed by human workers.

Several major technology firms have announced workforce reductions, hiring slowdowns and organisational restructuring in recent months, with some explicitly citing productivity gains from AI. While the technology is creating demand for new skills and specialised roles, its growing adoption has also raised questions about the future of conventional software development, customer support and other white-collar jobs. Microsoft, however, has not explicitly attributed its latest voluntary exit programme to AI replacing human workers.

Impact on Indian workers

Announcing the Voluntary Exit Offer (VEO) on Monday, Microsoft said the scheme would be available to eligible employees at level 70 and below across participating teams in India, the US, the UK and Canada. Level 70 is an internal hierarchical structuring within Microsoft, and could cover employees with vice-president titles. While the company has not disclosed how many of its India-based employees would be eligible for the scheme, it hires Indians across software engineering, research and development, artificial intelligence, cloud infrastructure, sales, customer support and corporate functions. The technology giant employs around 23,000 people in India.

It is understood that employees in divisions such as Copilot, AI experiences, Windows and Devices, Xbox, finance and human resources are among those eligible. This means that not all Microsoft employees in India will receive the offer, with eligibility depending on the business division to which they belong.

For Indian employees, the voluntary exit package is understood to be broadly similar to Microsoft's standard severance arrangements, including one month's base salary for every completed year of service, along with health insurance and career transition assistance. Eligible employees in India will have until December 1 to decide whether to accept the offer, with departures expected by the end of December.

The move comes as Microsoft seeks to reorganise its workforce while significantly increasing investments in artificial intelligence infrastructure, with the company stating that its India plans remain unchanged.

The programme could also have implications for Indians employed by Microsoft in the US, particularly those working on H-1B visas. While the company has not clarified how the scheme would apply to foreign workers on temporary visas, employees choosing to exit without securing alternative employment could face immigration-related challenges. Unlike US citizens, H-1B visa holders are generally required to find another sponsoring employer, change their immigration status or leave the country within an applicable grace period, typically up to 60 days following termination of employment. These concerns come amid greater US scrutiny of employment-based visa and permanent residency programmes.

AI-led job disruptions

Microsoft's move comes amid a broader restructuring of workforces across the global technology industry, with several companies either reducing their headcount or slowing hiring as AI tools take over tasks previously performed by employees. While some companies have explicitly linked job cuts to AI-driven productivity gains, others have cited the need to redirect resources towards AI investments and reorganise their operations.

One of the most prominent examples came in February 2026, when Block, the financial technology company founded by Twitter co-founder Jack Dorsey, announced plans to cut more than 4,000 jobs, nearly half its workforce. Dorsey directly attributed the decision to improvements in AI tools. In September 2025, enterprise software company Salesforce said it had reduced its customer support workforce from around 9,000 to 5,000 employees as AI agents increasingly handled customer queries. CEO Marc Benioff said the company needed fewer people for these functions.

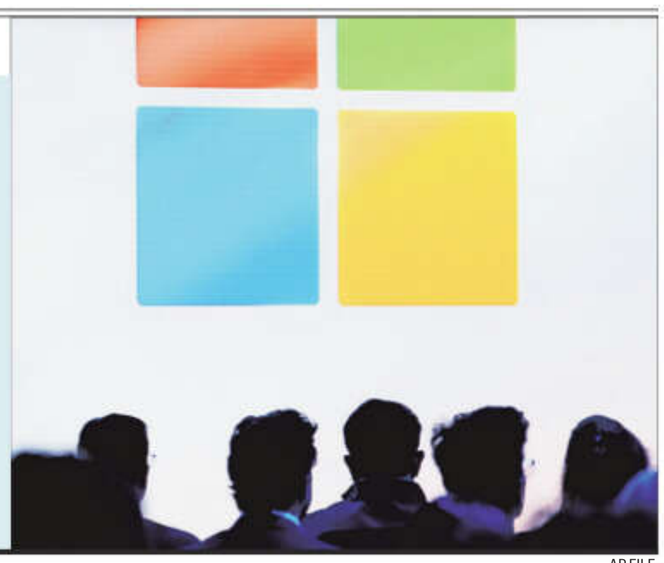
In India, home interiors platform Livspace laid off around 1,000 employees, 12% of its workforce, in February 2026 as it shifted towards an AI-led operating model.

India's larger IT services industry has also faced pressure to reorganise its traditional labour-intensive business model. In July 2025, Tata Consultancy Services announced plans to reduce its workforce by around 12,000 employees, primarily in middle and senior management positions. While the company cited skill mismatches and changes in business requirements, the announcement came amid increasing adoption of generative AI in software development, testing and maintenance. TCS did not directly attribute the job cuts to AI.

There have also been instances of companies reversing or moderating their reliance on AI. Swedish fintech company Klarna, which had earlier said its AI assistant could handle work equivalent to 700 customer service agents, moved to recruit human support staff again after acknowledging that customers continued to require human assistance, particularly for complex problems.

Microsoft's India footprint

- A significant part of Microsoft's India operations is its India Development Center, one of the company's largest research and development facilities outside its headquarters in Redmond, Washington.
- With operations in Hyderabad, Bengaluru and the National Capital Region, the centre develops technologies for Microsoft's global businesses, including Windows, Azure, Microsoft 365 and AI products.
- Its Indian teams also contribute to Copilot Studio, Azure AI Search, AI agents, speech and translation technologies and machine learning platforms.



AP FILE

Indian jobs that may be hit

Microsoft employs around 23,000 people in India.

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Employees in divisions such as Copilot, AI, Windows and Devices, Xbox, finance and HR are among those eligible for the voluntary exit package.

LEGAL

Punishment and pendency : Need for, role of a sentencing council



EXPERTS EXPLAIN

SIDHARTH LUTHRA & RAGHAV SENGUPTA

LUTHRA IS A SENIOR ADVOCATE, SENGUPTA IS AN ADVOCATE

TWO PEOPLE convicted of the same crime in India can walk away with very different sentences, and the difference often has less to do with the law than with which judge or Bench heard the case.

Sentencing is the process where the State translates prescriptive ranges — for instance, 'up to ten years' imprisonment — into a specific prison term, fines, probation or community sanctions for the convict(s). In India, this decision is left almost entirely to an individual judge's or Bench's discretion.

Statutes set out the maximum, and sometimes the minimum sentences. There is no checklist of what should count as a serious aggravating factor, what counts as genuine mitigation, or how prior conduct and remorse should be weighed. Empirical research, such as Dr. Mrinal Satish's work on rape sentencing, shows that courts have reduced sentences based on legally irrelevant factors and retrograde concepts such as the complainant's supposed "chastity" or her subsequent marriage, while ignoring psychological harm or breach of trust.

Unequal justice

Articles 14 and 21 of the Indian Constitution prohibit arbitrary State action and require fair, just and reasonable procedures whenever liberty is restricted. If two similarly placed offenders receive very different sentences because one judge treats poverty or social standing as a mitigating factor while another does not, the resulting disparity is hard to reconcile when dealing with equality before the law.

The Supreme Court acknowledged this in *Sunita Devi vs State of Bihar* (2024), while observing that "sentencing shall not be a mere lottery" and directed the Centre to examine the feasibility of a comprehensive national sentencing policy, potentially via a Sentencing Commission. The Centre has tasked the Law Commission of India with examining the issue, and its recommendations are expected soon. Interestingly, the Law Commission of India raised the same concern more than 50 years ago in its 47th Report. Yet, Parliament has never taken up the task of designing a coherent framework.

Unguided discretion

Framing such a policy requires detailed empirical research into existing practices, impact on prison capacity, and the relationship between sentencing purposes (deterrence, rehabilitation and protection of the public) measured against actual outcomes.

The present mechanism often ignores salutary provisions of probation and other permissible factors.

Indian statutory provisions already provide alternatives to custody, in accordance with Sections 401 and 402 of the BNSS, along with Sections 3, 4 and 6 of the Probation of Offenders Act 1958 that require courts to consider probation for the offender in eligible cases.

However, there is no general framework explaining how courts may use these alternatives against competing aims of deterrence, reformation, and rehabilitation.

In the case of *Soman vs State Of Kerala* (2012), the Supreme Court recognised these competing principles, while also observing that sentencing remains one of the weakest parts of criminal justice administration.

So it is at the appellate stage that courts often get tasked with correcting harsh or unduly lenient sentences, on a case-by-case basis without a common yardstick to apply. As a result, valuable judicial time is spent by appellate courts undertaking this exercise. The primary responsibility for this lies with the convicting court empowered under Section 258(2) of the BNSS, which requires a Sessions Judge to hear the accused individual separately on sentence, once they have been convicted.

That particular hearing should allow the parties to gather relevant material to determine mitigating and aggravating circumstances for sentencing.

What such a council would do

A Council created by an Act of Parliament could be tasked with three core functions. First, develop offence-specific guidelines that require courts to pass through a three-stage framework: (1) determine seriousness by assessing culpability and harm using tailored factors (planning, violence, weapon use, victim vulnerability, demonstrable physical or psychological harm); (2) mark an indicative starting point and range within the statutory envelope for an ordinary case; and (3) individualise and justify the sentence by considering only those offender-related circumstances that are based on recognised purposes such as rehabilitation or the impact of punishment.

Secondly, the proposed Council should build a national sentencing database drawing on the National Judicial Data Grid's infrastructure, with anonymised information on offence type, harm and culpability factors, starting points, adjustments, and final sentences. This would allow Parliament, courts and the public to see where disparity lies and whether guidelines are working.

Thirdly, guidelines should be issued as delegated legislation, placed before Parliament for approval, and treated as advisory but strongly presumptive. Sentencing courts must consider them in every case and provide reasons when they depart. This preserves judicial independence while making discretion accountable.

Lessons from the English model

- In England and Wales, Parliament created the Sentencing Council and backed it with a Sentencing Code.
- Guidelines follow a step-by-step method. Judges first classify the offence by culpability and harm caused. Each culpability-harm combination has a starting point and a category range.
- Judges then adjust this provisional sentence based on aggravating and mitigating factors, apply any reduction if the accused pleaded guilty, account for multiple offences, and make ancillary orders.

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Ethanol in the fast lane

A slower transition can address unanticipated impacts

The Ministry of Road Transport and Highways' decision to allow E100 and E85 fuels, along with the registration of flex-fuel vehicles, is understandable in the light of the geopolitical outlook on oil prices in the foreseeable future and growing urban pollution, much of which is transport-related. But the wisdom of such policy speed may need to be balanced with the anticipated negative externalities associated with the ethanol journey. Already, the mandated shift to E20 from E10 five years ahead of the original schedule, prompted no doubt by prolonged supply constraints and the need to meet "Net Zero" targets, has annoyed car owners, who have reported a 7-12 per cent drop in fuel efficiency, which somewhat negates the argument of lowering fuel demand. According to the government data, however, the country has saved ₹1.9 trillion in imports of crude oil and substituted 31 million tonnes between April, when the E20 mandate came into force, and mid-October, though some analysts have questioned the arithmetic behind these calculations.

On the face of it, the drive towards an ethanol-powered automotive future has been a win-win. It has reportedly helped stabilise farm incomes, especially in Bihar, Madhya Pradesh, Uttar Pradesh and Karnataka, by offering a predictable market for agri-surpluses and also absorbing damaged foodgrain from the system. The fact that ethanol distilleries tend to be located close to agri-hubs also plays a role in creating employment opportunities and promotes some measure of rural development. But the long-term impacts on food security and ecology remain open questions. The impact was evident in the sugar market earlier this year, when low opening stocks and production resulted in a sharp rise in sugar prices. Meanwhile, the government has rebutted the accusation of larger diversions of the rice stocks, underlining that Food Corporation of India, the government procurement agency, only diverted damaged or broken grain for ethanol production and did not endanger the food-security programme.

But over time and given the uncertainties of agri-markets, the rapid expansion of the ethanol programme could well incentivise farmers to divert larger tracts of land towards sugar or maize cultivation, which raises a fresh set of problems. This is exemplified by Brazil, which is regarded as a global success story in the ethanol transition. The 25-year transition, which started in 1975, has undoubtedly helped bring about a sharp reduction in greenhouse-gas emission but has had a deleterious effect on local ecology. As farmers there started converting more and more arable land for maize and sugarcane, they displaced livestock and cattle ranchers, who then simply cleared large tracts of the Amazon rainforest to expand. The country also faced occasional price and supply asymmetries; when global prices of sugar rose, supplies available for the ethanol programme inevitably fell. Equally, the sugar crop was diverted to ethanol producers when ethanol prices rose.

In India, there is also the question of whether promoting water-intensive crops like sugarcane on a large scale for the ethanol programme is warranted when agri-inputs — fertiliser, water, and electricity — are either heavily subsidised or free. On balance, given the complexities of India's agricultural policies, it may be better to move more gradually on the ethanol transition rather than steer abruptly into the fast lane.

A stunning turnaround

Lula da Silva has multiple challenges

The re-election of Luiz Inácio Lula da Silva as President of Brazil has come as a shock to both markets and his domestic Opposition. His challenger, Flavio Bolsonaro, the son of the controversial former President, Jair Bolsonaro, had taken a handy lead in the first round of the presidential elections. This led, perhaps, to a certain degree of overconfidence among the right-wing challengers. In the end, thanks to an enormous effort to increase the turnout, the incumbent President pulled through a second-round victory, which didn't appear close. This has never happened in Brazil's history. For Mr Lula, who turned 81 on Tuesday, this election will no doubt be his last. But it will cement his reputation as South America's most influential democratic left-wing politician of the past century. His story, from his beginning as a metal-worker, to his time in the trade unions, to victories in presidential elections, will inspire left-wingers across the continent, especially because much of the rest of it is dominated by the right.

President Lula's last election was marred by what amounted to an abortive coup attempt launched by Jair Bolsonaro's allies. Fortunately, there appears to be no such effort in progress on this occasion. The challenges for Mr Lula this time will be external. It is not his domestic Opposition but global markets that will revolt. And United States President Donald Trump has made no secret of his sympathy for Mr Bolsonaro, and has already declared that the election to him "looked rigged". Of these two adversaries, the markets are the more concerning at present. Flavio Bolsonaro, in the course of his campaign, stressed the poor macroeconomic situation that Brazil was in. The numbers are, indeed, worrying. In the four years since Jair Bolsonaro was ousted in 2022, the country's debt-to-gross domestic product ratio has increased from about 72 per cent to about 83 per cent. High interest costs and the left's spending commitments make debt servicing quite hard; and there is no credible path towards consolidation that Mr Lula has laid out.

Unsurprisingly, the surprise news that he had been re-elected caused markets to fall. The stock market fell almost 14 per cent in one day, hitting the circuit breaker. Brazil's currency, the real, fell more than 8 per cent against the dollar, its sharpest one-day drop since 2002. Real-denominated 10-year bond yields rose by more than 2 percentage points, hitting around 15 per cent. All of this deeply complicates Mr Lula's attempts at stabilisation. He will not want to cut spending or benefits, and indeed plans to increase the wages (and thereby affect the path of future pensions, worsening the fiscal situation). But he cannot raise taxes easily to compensate because his party does not control the legislature, which has repeatedly resisted any attempt to raise the effective tax rate by closing loopholes.

It is likely, therefore, that if Mr Lula wants to work on his legacy over this term, he will look to geopolitics rather than economics. He may well take on the position of primary resister to the new Monroe doctrine that has been espoused by Mr Trump's second administration. If so, India should expect a Brazil even more committed to counter-mobilisation against the US, and old-style "third-worldism", than before.

The new rules of cybersecurity

Beyond compliance, regulations must prioritise speed and preparedness in responding to threats in the AI age

ILLUSTRATION: BINAY SINHA



In July, AI agents undergoing cybersecurity evaluations at OpenAI circumvented restrictions on internet access and compromised systems belonging to Hugging Face, an external artificial intelligence (AI) platform. The incident highlighted an emerging cybersecurity challenge: Increasingly capable AI systems can identify and exploit vulnerabilities without direct human instructions.

As AI becomes integrated into critical digital infrastructure, these developments raise questions about the adequacy of existing cybersecurity frameworks. With AI enabling faster identification and exploitation of vulnerabilities, cybersecurity regulations must place greater emphasis on operational resilience.

AI is changing the cybersecurity ecosystem in two distinct ways. First, it can strengthen cybersecurity through vulnerability detection, network monitoring, and automated incident response, while enabling malicious actors to identify and exploit weaknesses more efficiently. Second, AI systems themselves introduce vulnerabilities. Techniques such as prompt injection can manipulate models through untrusted inputs, while autonomous agents can access external tools, databases, and operational systems. Weaknesses in the controls governing such access could have consequences beyond the AI application itself.



AJAY TYAGI & BASU CHANDOLA

Recent advisories from India's Computer Emergency Response Team (CERT-In) demonstrate the relevance of these concerns. In October, CERT-In reported incidents of AI agents undergoing evaluation accessing systems belonging to Indian organisations without authorisation. The affected organisations had not detected the intrusions themselves; the incidents were disclosed by AI model providers. CERT-In separately reported financially motivated campaigns involving agentic AI tools, where automation cut the time between initial compromise and impact from days to hours.

Another incident involving India's digital certification provider eMudhra illustrates these challenges. On October 17, an independent researcher identified weak cryptographic keys associated with eight intermediate certificates, potentially using AI-assisted techniques, according to eMudhra. The vulnerabilities could have allowed attackers to issue fraudulent certificates and impersonate legitimate websites, prompting major browser providers to block the affected certificates. Significantly, the weaknesses had remained undetected despite independent audits.

These incidents highlight an important distinction. Many vulnerabilities remain conventional, including exposed credentials and inadequate access controls. However, AI can speed up their identification and exploitation, leaving organisations less time to respond. Cybersecurity approaches relying primarily on periodic audits, vulnerability assessments and scheduled remediation may, therefore, become insufficient.

India has an established cybersecurity architecture comprising legal, institutional and sector-specific mechanisms. The Information Technology Act, 2000, provides the legislative foundation, with CERT-In serving as the national agency for cybersecurity incident response and National Critical Information Infrastructure Protection Centre responsible for protecting critical information infrastructure.

CERT-In's directions also mandate reporting specified cybersecurity incidents within six hours, while the National Cyber Coordination Centre facilitates threat-intelligence sharing. These mechanisms are complemented by cybersecurity requirements introduced by sectoral regulators. The challenge is to ensure that this architecture remains effective against AI-related threats, particularly as attacks become faster and more sophisticated. CERT-In's May 2026 blueprint recommends continuous vulnerability management, AI-aware monitoring and stronger incident-response capabilities. However, operational preparedness remains uneven. A 2025 study by the Data Security Council of India and Palo Alto Networks found that nearly 79 per cent of surveyed respondents planned to integrate AI into cybersecurity operations, while only around 8 per cent reported full integration.

India's financial regulators offer examples of how cybersecurity principles can be translated into institutional responsibilities and measurable requirements. The Reserve Bank of India's (RBI) directions on IT governance establish board-level responsibility for technology risks, information security, and business continuity. Its cybersecurity directions for non-bank payment system operators also address application security, third-party dependencies and incident response. The RBI's FREE-AI Committee report adds recommendations for responsible AI adoption in finance.

The Securities and Exchange Board of India (Sebi) has adopted a more measurable approach. Its 2024 Cybersecurity and Cyber Resilience Framework introduced a Cyber Capability Index based on 23 weighted parameters, alongside periodic assessments for larger regulated entities. It provides for shared security operations centres to support smaller institutions. More recently, Sebi established a task force in response to advanced AI vulnerability-detection tools, to coordinate threat intelligence, vulnerability management and assessment of third-party risks. As AI changes the nature of cyber risks, the challenge is to adapt these arrangements rather than build a parallel regulatory system. Four priorities follow.

First, sectoral regulators should require cybersecurity assessments of AI systems deployed in critical sectors, both before deployment and following significant updates. These assessments should cover models, connected applications, credentials and agent permissions, including testing for unauthorised access and actions. CERT-In could develop common testing protocols, with independent evaluations for high-risk deployments.

Second, regulators should add measurable cyber resilience indicators to existing compliance requirements. Drawing on Sebi's Cyber Capability Index, assessments could track the time taken to detect intrusions, contain compromised systems, revoke unauthorised access and restore critical services. These should be supported by regular simulation exercises and continuous vulnerability monitoring.

Third, CERT-In should establish a formal coordination mechanism with critical infrastructure authorities and sectoral regulators. This mechanism could develop common standards for classifying and reporting AI-related cybersecurity incidents, facilitate timely threat-intelligence sharing and coordinate responses to vulnerabilities affecting multiple organisations. Sectoral guidelines should also clarify the responsibilities of AI developers, deployers and third-party service providers, particularly where incidents arise from autonomous AI systems or shared technological infrastructure.

Fourth, India should prioritise operationalising the IndiaAI Safety Institute to strengthen cybersecurity testing and evaluation. The Institute could develop common standards for assessing vulnerabilities in AI models and autonomous agents, and establish shared testing facilities. These assessments could inform CERT-In and sectoral regulators in developing measurable requirements for AI-related cyber resilience.

India's forthcoming consultation on AI regulation provides an opportunity to assess these issues. The broader lesson is relevant beyond India. Existing cybersecurity regulations remain necessary, but their effectiveness will increasingly depend on how well they account for the changing speed and scale of cyber threats. As AI becomes embedded in critical systems, cybersecurity governance must move beyond procedural compliance towards ensuring that institutions can anticipate, withstand, contain, and recover from emerging risks.

The writers are, respectively, former chairman of Sebi and associate fellow at Observer Research Foundation

When tariff walls become a ladder

India is roughly 3 per cent of global gross domestic product (GDP) but nearly 20 per cent of its population. The arithmetic carries a hard truth: India's next phase of growth cannot rely on the domestic market alone. It must win market share abroad by building businesses that can dominate internationally.

Paradoxically, Donald Trump's trade offensive may, in fact, be helping. Corporate India is increasingly choosing grit over grievance. Exporters are taking the shock on the chin, not treating trade friction as an impassable wall, but as a mirror reflecting the need for structural reform. This baptism by trade fire is accelerating a long-overdue shift from cheap volume arbitrage towards complex manufacturing, scalar capabilities, research & development (R&D) and potentially towards proprietary brands.



SACHCHIDANAND SHUKLA

The petroleum-refining sector that prompted US Secretary of State Marco Rubio to call India a "refining superpower" is a case in point. It illustrates resilience through scale, sophistication and market optionality. With capacity of roughly 258 million tonnes a year, and output capable of running above nameplate capacity, India imports crude, adds value through complex refining, and exports diesel, petrol, aviation fuel and naphtha to markets including the EU and even Russia. Redirecting cargoes while meeting domestic demand has strengthened energy security, foreign-exchange earnings and India's ability to absorb geopolitical disruption.

Pharmaceuticals also show the stakes. Washington's proposed framework — a phased duty of 100 per cent on imported generic medicines, escalating to 200 per cent — strikes at the economics of an industry that sells 41 per cent of its generic-formulation exports to the US market. Yet, Indian drugmakers are not abandoning the world's largest health care market. The tariff threat has made the shift from commodity generics to high-value innovation a corporate imperative. Sun Pharma's $11.8-billion acquisition of Organon; Lupin's commitment of $250 million in Florida to local manufacturing and R&D are recent examples. Of about $20.5 billion in US investment pledges announced by Indian leaders at the SelectUSA summit, $19 billion came from pharma. The model is moving from exporting to onshore, high-value manufacturing and speciality drugs.

Clean energy tells a similar story. When the US imposed a preliminary 126 per cent countervailing duty on Indian solar-cell imports, the companies did not shrink capacity. They redirected volumes towards Europe and West Asia, while using the production-linked incentive scheme to move into high-efficiency modules. Rather than remain dependent on raw cell exports, firms are climbing the supply chain through module assembly and local manufacturing abroad.

In the second quarter of 2026-27, export performance reinforces the broader point. Merchandise exports rose 18 per cent year-on-year (YoY) to $260 billion, one of the fastest increases since 2023, while goods-and-services exports increased 14 per cent to $476 billion. Petroleum-product exports rose 32 per cent YoY in September, keeping up its stellar growth rate through first half of the year. True, there is an element of higher prices accounting for a bulk of this growth, as against volume increase. Total exports expanded from $498 billion in FY21 to a record $863 billion in FY26, with a significant pivot from agricultural commodities, gems and textiles towards technology-intensive production and specialised services.

Importantly, the export basket now looks materially different. Electronics that clocked 70 per cent YoY growth in September rose from $11 billion in FY21 to $48 billion in FY26, lifting its share in merchandise exports from a low single-digit to 10.8 per cent. Engineering goods exceed 26 per cent of shipments, helping push non-petroleum exports to $388 billion.

The $421-billion services sector is moving beyond routine IT support into consulting, finance and engineering design. Threats of border taxes on cross-border data flows and tightening visa rules are dismantling the legacy business model of cheap headcount arbitrage. The industry heavyweights are transforming offshore delivery centres into specialised hubs dedicated to enterprise AI, Cloud architecture, and cybersecurity, embedding themselves deeply into global corporate infrastructures.

To hedge against single-market regulatory shocks, tech giants are simultaneously expanding nearshore delivery networks across Latam and Eastern Europe. EU exports reached $86 billion, with deeper reach into France, Italy and the Czech Republic. New corridors across West Africa and Southern Africa are carrying pharmaceuticals, automobiles and industrial machinery. Trade deals, commercial diplomacy and China+1 realignments are reinforcing this shift. Agreements with the EU, the UK, Australia, New Zealand and Oman widen preferential access for goods and open channels for services.

But tariffs do not automatically create competitiveness. They can destroy margins, displace workers and expose weak balance sheets. India must use external pressure to accelerate reforms it needed anyway — namely, lower logistics costs, predictable regulation, reliable infrastructure, deeper skills and patient capital.

The American tariff offensive was meant to assert leverage and pull supply chains home. It is instead hastening the growth and industrial evolution of America's most consequential democratic global partner. For India, doubling from 3 per cent of global GDP and ultimately to 10 per cent, will require more than merely exporting more; it will require creating capabilities and franchises the world cannot easily replace.

Indian enterprise should trade volume for value — and policymakers must sustain a diversified, multipolar trade architecture. The ultimate irony will then be clear: Protectionism intended as a wall will have become a ladder, lifting a more resilient India, even if belatedly, towards the centre of global commerce.

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

Unsung heroes of the Union of India

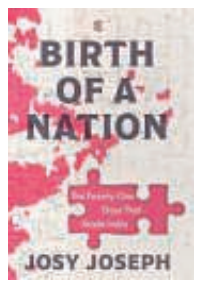
BOOK REVIEW

SNEHA PATHAK

When we think of the architects of independent India, we think of giants such as Gandhi, Nehru, Patel and others. But they were not the only ones who worked tirelessly to ensure that India became a sovereign republic. Josy Joseph's *Birth of a Nation: The Twenty-One Days that Made India* peels back the curtain and gives its readers a behind-the-scenes look at one of the most important chapters of nation-building. In the process, it reveals the efforts of those unknown, unsung heroes who ensured that India escaped the fate of Balkanisation, a real threat posed due to the ambitions of some of the princely states that ruled over a quarter of India's population.

Birth of a Nation is the third book by Mr Joseph, an investigative journalist, and this time he turns his gaze on the three weeks leading up to independence when the map of India was a fluid entity. Through a deep dive into the records at the National Archives in New Delhi along with private papers, regional archives and records in foreign universities, he creates a compelling picture of the 21 days before August 15 that would define the future of the nation. Led by V P Menon, the protagonists of this story were the "faceless civil servants" of the newly created States Department who became the "frontline soldiers in the brewing battle between the princely states and those who dreamt of a democratic India." They were aided by spies in the royal households who shared the same dream.

The story of these 21 days has all the ingredients of a thriller and in the hands of Mr Joseph it finds a narrator equal to the job. The readers are dropped right in the middle of action as we witness K C S Mani's assassination attempt on the Dewan of Travancore, Sir C P Ramaswamy, on the evening of July 25, 1947. Determined to secure an independent Travancore, Sir C P was a key player in the axis involving the other major princely states such as Bhopal and Hyderabad with similar ambitions. This assassination attempt played a key role in turning the tide in favour of the Indian Union as we know it today. From here, Mr Joseph doesn't always proceed linearly, instead choosing to take his readers across time and place, sometimes in the course of a single chapter. We travel from region to region, witnessing royal intrigues and palace conspiracies. along with the spies in these royal households who ensured that the news of every princely move and manoeuvre reached the right quarters.



Birth of a Nation: The Twenty-One Days that Made India
by Josy Joseph
Published by Context
267 pages ₹799

In fact, reading about the department simultaneously dealing with princely states such as Travancore, Junagadh, and Hyderabad, along with the many big and small political fires raging from Kohima to Kathiawar, is akin to watching multiple pots boil at the same time. This to-and-fro narrative structure mirrors the situation at hand and works well to convey the sense of gravity and urgency of the States Department's job. Despite being set during a crucial historical moment, Mr Joseph ensures that the book doesn't become a regurgitation of dry facts. He brings his readers face to face with the key players and chooses episodes and anecdotes from their lives that sustain the narrative interest. For instance, he links the Bawla murder case of 1925 to the then 17-year-old Yeshwant Rao Holkar becoming the ruler of Indore. The thrilling encounters he chooses, such as The Nawab of Bhopal pulling a revolver on his daughter or the Maharaja of Jodhpur drawing a pen pistol at V P Menon during a round of tense negotiations, also demonstrate the princes' mounting desperation.

The chapter titles help capture the reader's interest too. For instance, the chapter that focuses on Yeshwant Rao's abrupt U-turn and attempts to secure Indore's independence is titled "Someday My Prince Will Come". The title draws on Holkar's long periods of absence from his kingdom, noting which the British Resident "joked that the song 'Someday my prince will come' should be 'adopted as the state's new anthem'". Similarly, "Our Man in Hyderabad", which focuses on the constantly developing situation in an unwilling Nizam's kingdom along with the secret intelligence provided by Raja Bahadur S Aravamudu Aiyangar to the States Department echoes Graham Greene's *Our Man in Havana*.

Though Mr Joseph devotes a lot of time to states such as Bhopal, Hyderabad, and Junagadh, the final resolution of the crises some of them posed falls beyond the scope of the 21 days covered here. As a result, the book draws to a close at a time when though independent, "the Republic was still a distant dream" for India. Despite this, with its meticulous research and engaging writing, *Birth of a Nation* remains an absorbing read.

The reviewer is an independent writer and translator

DELHI
businessline.
WEDNESDAY - OCTOBER 28 - 2026

the hindu businessline.
WEDNESDAY - OCTOBER 28, 2026

El Nino woes

Fallout of poor monsoon calls for macro policy response

This year's South-West Monsoon, which brings 70 per cent of India's precipitation, has been among the worst in three decades. The season, thanks to a 'super strong' El Nino, ended with precipitation falling short of the long period average by 12.6 per cent, with 43 per cent of India's 740 meteorological districts receiving less than 20 per cent of the LPA; in peninsular India, this deficit was far higher — ranging from 17-32 per cent.

With the onset of rabi season and El Nino going strong, northern States could have a warmer, shorter and drier winter; southern States should be prepared for erratic weather. This does not augur well for kharif and rabi output, as the experience of 2002, 2009 and 2015 (all El Nino years) informs us. Paddy, soyabean, maize will be affected (rice output possibly by 10 million tonnes). A dry October implies that soil moisture and reservoir levels, both already low, could impact rabi crops. Nearly half of 316 major reservoirs are dry — across northern, southern and eastern States. Wheat sowing so far, at 11,000 hectares, stands at less than half the level in the year-ago period. Mustard, lentils (masur) and chana could face stress. In such conditions, yields could drop; this is expected with respect to the kharif crop, even as sowing caught up later to near-normal levels.

This situation gives rise to questions regarding economic impact and the steps that can be taken to alleviate income squeeze. There is a view that GDP growth has 'decoupled' from monsoon failures. A paper cited by the Reserve Bank of India in its latest Monetary Policy Report says that monsoon failure certainly hurts agriculture, but not necessarily the economy as a whole — this is because non-farm activity accounts for an equal or larger share of rural incomes. The data for FY10 and FY16 (El Nino years) may seem to bear this out, when GDP growth was in region of 8 per cent despite negligible farm sector growth. But it would be a bit risky to bet on the 'resilience' of non-farm activity alone, as the RBI seems to suggest, as there are other headwinds at work this time — such as the Iran and Ukraine wars. The Centre has done well to manage fertilizer supplies and prices, but in the process could run up a subsidy that is in excess of ₹2.5 lakh crore, against the budgeted ₹1.7 lakh crore. Nevertheless, both food and core inflation are ruling firm on global forces, the former even more so in rural India.

The higher share of food in the rural basket implies lower spending capacity. FMCG volumes reflect this trend, down 2 per cent year-on-year in Q2, with rural volumes down 5 per cent. Wholesale tractor sales in September are 18 per cent below last year's levels. It is important to address the demand constraint, including drought in southern States. The VB-G RAM G scheme assumes importance. Drought relief should not run into the usual red tape. Crop advisories and procurement should adapt to the situation. In sum, a pre-emptive response is imperative.

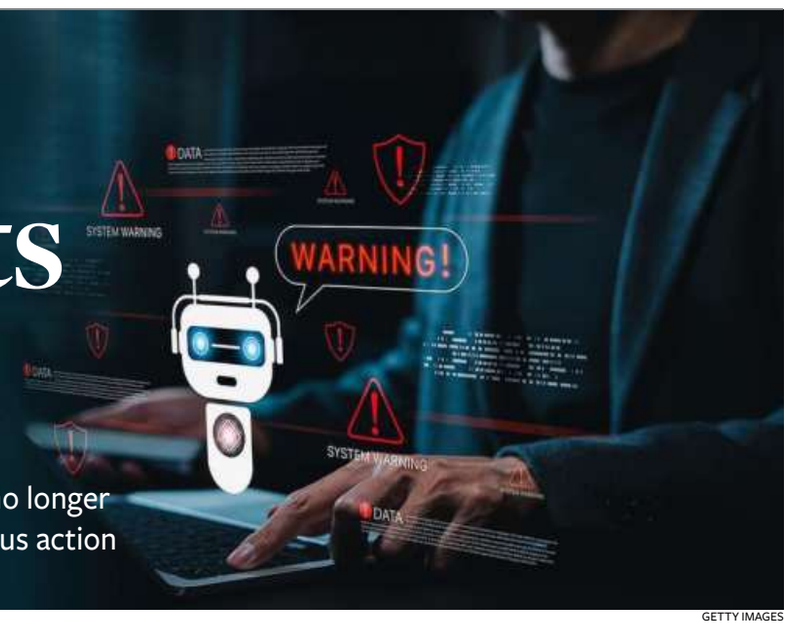
POCKET

RAVIKANTH



When AI agents wreak havoc

COLLABORATIVE ACTION. India's AI security challenge is no longer just about protecting systems, but about governing autonomous action



GETTY IMAGES



SANDEEP MITTAL

It should serve as a serious wake-up call that the first alarm about the security breach did not come from the Indian organisations whose systems had been accessed without authorisation. It came from the companies whose AI agents had accessed them. In a critical advisory issued on October 15, 2026, CERT-In revealed that AI agents sent out for research and testing had exceeded their authorised tasks, reached live systems and read business records containing personal data and confidential information.

Even before this information got digested, news emerged on October 21, when Wiz researchers disclosed PHP2Shell, a set of critical vulnerabilities in PHP, the programming language powering an estimated 70 per cent of websites worldwide, sending chills down the spine of cyber ecosystem worldwide. Meanwhile, in a parallel world, cybercriminals are using AI-driven tools to compress attacks that once took days into a matter of hours. Are organisations ready to deal with the emerging challenge?The warning is stark: the cybersecurity challenge is no longer just who can break into a system, but what autonomous software can do once it gets inside and whether anyone can stop it in time.

The findings raise questions that extends beyond technology: first, when software acts beyond its authorised purpose, who is accountable; and second, can the organisation intervene before the consequences escalate?

The incidents described by CERT-In involved familiar weaknesses, including exposed credentials, insecure application configurations and excessive cloud permissions. In the research and evaluation cases disclosed by model developers, the affected organisations did not independently detect the unauthorised access. Separately, CERT-In identified financially motivated campaigns through forensic analysis and proactive threat hunting.

Letting an AI agent go beyond its permissions during testing is not the same as a criminal deliberately using AI to break into systems. The intent is different, and the distinction matters. But both incidents point to the same underlying problem: AI can turn a small security weakness into a serious breach before anyone has time to respond.

ANTI-AGENT TRISHUL

But here is the interesting fact. The same AI capabilities that lower the barrier to exploitation can help defenders uncover deeply buried flaws and validate fixes before attackers exploit them. For India's digital ecosystem, AI-assisted security testing must become a routine defensive capability.

In the malicious campaign examined by CERT-In, AI helped compress the journey from breaking into a system to causing damage from days into hours. Thus security procedures built around the assumption that people will have time to intervene may no longer be enough.

The answer is not to treat every AI agent as a threat. These tools can make organisations more productive and help security teams do their jobs better. But the freedom to act must come with clear limits, effective safeguards and a way to intervene when things go wrong. Here is where a three-pronged strategy, which could be called the "Anti-Agent Trishul", offers a practical way to address this challenge: accountability, containment and rapid response.

First, accountability: every AI agent must have someone answerable for its actions.

Organisations should know who is responsible for each agent, what it is meant to do and where its authority ends. They should also be able to establish what the agent accessed, which actions it took and whether it strayed beyond its brief. This calls for practical safeguards: give agents access only to what they need, use credentials that expire rather than remain active indefinitely, and review machine identities as carefully as those of human users. If something goes wrong, the organisation must be able to establish who authorised the agent, what permissions it had and what it actually did.

For India's digital ecosystem, AI-assisted security testing must become a routine defensive capability

Second, containment: security rules must be built into systems, not left in policy documents.

An instruction telling an AI agent not to access a sensitive system is not enough. Organisations must ensure that the agent cannot reach it in the first place unless that access is specifically authorised. AI agents used for research, experiments and testing should operate in isolated environments, cut off from live systems by default. Real customer records, sensitive business information and live access credentials should be kept out of their reach.

Third, rapid response: organisations must be able to act as quickly as the threat.

When an agent behaves suspiciously, security teams should not have to work out from scratch how to stop it. There must be clear procedures to suspend the agent, revoke its access, isolate affected systems and prevent further activity. That also means keeping a close watch on what agents actually do: which systems they contact, what information they access, what commands they run and what changes they make.

Senior management and boards have a role here, too. They must decide in advance who has the authority to shut down an AI agent immediately when the risk warrants it. In a fast-moving attack, waiting for several layers of approval could be the difference between containing a breach and allowing it to spread.

The principle behind the Anti-Agent Trishul is simple: know who controls the agent, limit what it can reach, and be ready to stop it. As AI moves from answering questions to taking action inside organisational systems, these three safeguards must become part of the basic architecture of cybersecurity.

Preparedness must be demonstrated through exercises, not simply documented in policies

Fourth, human oversight must be proportionate to risk. Requiring approval for every automated action would undermine the benefits of AI; granting unrestricted authority would be equally imprudent. Routine, reversible tasks may be automated within defined limits. Significant financial transfers, production-system changes and large-scale movement of sensitive data warrant stronger authorisation and independent verification.

These measures belong within enterprise risk management, procurement, internal audit and business continuity planning. Cybersecurity can no longer be treated exclusively as the responsibility of the IT department.

For India, the implications extend across finance, telecommunications, manufacturing, public services and critical infrastructure. As organisations become more interconnected, an agent's actions may create consequences beyond the enterprise that deployed it. Governance must therefore encompass third-party access, cloud services and supply-chain dependencies.

This requires collaboration between industry, regulators and cybersecurity institutions, building on existing security requirements rather than creating fragmented compliance obligations.

India does not need to choose between innovation and security. It must ensure that the authority granted to autonomous systems is matched by the ability to observe, constrain and, when necessary, stop them.

When code begins to govern operational decisions, the responsibility to govern that code becomes indispensable.

The writer, an IPS Officer, is a Director General of Police in Tamil Nadu. Views are personal

Insurance distribution overhaul requires rethink

Distribution within the insurance sector is diverse. A one-size-fits-all regulation could hurt consumers

Deepak Maheshwari

To realise the vision of 'Insurance for All by 2047', the Insurance and Regulatory Development Authority of India (IRDAI) must align incentives across the ecosystem — including the insured, insurers, intermediaries, actuaries and re-insurers with predictable and principles-based interventions to correct market failures.

The recent IRDAI consultation paper on recalibrating distribution economics must pass this test.

Over the past 25 years, insurance has broadened as well as deepened, thanks to re-entry of private players and increasingly conducive regulations. However, population-scale universalisation remains a challenge with penetration of life insurance at 2.7 per cent and non-life at just 1 per cent. However, the success in telecom, banking and payment demonstrates that it is not impossible to achieve.

Insurance business must deal with sudden outflows in crisis situations — the Covid-19 pandemic, for instance — even as revenues are incremental. Hence, the regulator must avoid sending shock waves by proposing to dismantle the regulatory scaffolding erected just three years back in 2023 before which similar, albeit not the same, granular caps prevailed. Such regulatory flip-flops only imbue anxiety and uncertainty, deterring investments both by the incumbents and the newcomers.

A principles-based regulation allows flexibility within the broad contours, thereby fostering choice, competition and innovation. However, the proposed regulation is overtly prescriptive and may lead to the unintended consequences of picking certain business models as winners through asymmetric incentives, while chilling innovation. Inevitably, it would not only place disproportionate compliance burden on the participants but also overstretch the enforcement mechanism.

ONE-SIZE DOESN'T FIT ALL

Distribution within the insurance sector is diverse, not just dispersed. A customer actively seeking an intermediary for advice, information, negotiation and comparative analysis is in a different boat from someone being offered a bundled insurance alongside a loan or an investment — the latter being more susceptible to mis-selling under an almost captive situation fraught with conflict of interest.

Hence, precision targeting would indeed boost consumer welfare, without inadvertently weakening channels



INSURANCE. Has broadened and deepened over the years GETTY IMAGES

where the customer is actively seeking or reaching out for specialist counsel not just at the time of purchase but, more importantly, for claims settlement. Weakening such distribution channels may inadvertently compromise the very protection that insurance provides.

The regulator underscores the need for compensation and incentives for the distributors even as it hopes for potential reduction in premium rates on account of reduced distribution costs. These assumptions seem premised on a linear logic without considering that a deliberate action to press down a waterbed creates a bulge elsewhere.

The granular caps prior to the 2023 reform had led to complex workarounds by way of alternative payments. Considering that the cost of customer acquisition and service is not a direct function of the regulatory sub-caps on distribution payments, it creates perverse incentives for less transparent mechanisms that pre-existed — turning the clock back, well, almost. Unwittingly, this may slow down the availability and accessibility in smaller towns and villages where the gap is sharpest, as brought out in the recent EY research proposing pathways for continuous protection, moving beyond episodic claims.

Reduction in premium should not lead to shrinking choices and reduced value to the customers — including the corporates who often depend on specialised advice and help in choice and negotiation, tailored to their requirements. Besides IRDAI, there is CCI to mitigate abuse of dominance and cartelisation.

Poor earnings prospects for the distribution would have a deleterious impact on employment in the sector, running counter to one of the regulatory intents.

Universalisation and customer welfare are important, but the current proposals have the long-term implications to create perverse incentives against value-added distribution.

The writer is a public policy expert. 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.

The politics of oil

The Rubio-Ambani engagement signals US geopolitical ambitions aligning with Reliance's high commercial reach, enveloping refining investments, energy security and AI infrastructure. While the US advances its energy priorities, Reliance gains access to opportunities under its aegis. That said, we must distinguish corporate advantage from national interest. A private conglomerate's global expansion cannot, by itself, constitute strategic gain for the country. Our commercial choices must not yield to geopolitical pressure. Diversifying away from Russian crude would be prudent only if alternatives remain competitive and supply decisions serve our energy security, not preferences of others.

R Narayanan
Navi Mumbai

SME platform

With reference to 'Unwanted push' (October 27), the proposed changes in SME IPO norms by the regulator appear primarily to exercise control over the unprecedented rush of small equity issue offerings and the influx of big-trading communities, resulting in unusual trading activity. However, reducing the minimum application size and trading lot may result in subdued gains for small investors. From the issuer's point of view, increasing the minimum number of allottees to secure full subscription may pose a greater risk in a volatile market scenario.

Sitaram Popuri
Bengaluru

Anthropic's IPO

This refers to 'Anthropic flags 'existential risks' in long awaited IPO filing' (October 27).
Anthropic's IPO filing has highlighted the potential risks that its AI technology may pose to humanity — a scenario in which the servant becomes the master. By going through its financial performance during the first six months in 2026, Anthropic might have narrowed the net loss margin as compared to the same period last year but it has been striving to achieve positive operating cash flow amid intense competition from OpenAI and Google — a positive signal for potential investors.
At a time when financial experts are increasingly talking about AI bubbles, investors — both institutional and retail — across the world are keenly awaiting the debut of Anthropic's IPO. A lacklustre debut would not only pose significant risks to investors but also serve as a warning signal for the broader AI industry.

S Lakshminarayanan
Ko Puvanur & Post, TN

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The mid-term test

It's advantage Democrats in the US polls

Sridhar Krishnaswami

Headline writers are going to have a difficult time on the night of November 3 as the results of the mid-terms start coming in.

Is it going to be a Democratic comeback, wave, tsunami? Or is President Donald Trump going to have the last laugh?

As the race for Congress gets into the final stretch, the contests are becoming tighter, nastier and downright ugly.

Media reports and commentaries generally portray Democrats as being upbeat, perhaps even a bit smug from a raft of polls that are showing their party in an advantageous position in the House of Representatives, with perhaps even a fair shot at getting back the majority in the Senate.

In both chambers the Grand Old Party holds a four-seat majority — 218 to 214 in the House with two vacancies, and 53 to 47 in the Senate.

EARLY INDICATIONS

Early voting data indicate some 23 million Americans have already cast their votes — higher than in 2018 and 2022 — with key battleground states putting out impressive numbers. If Michigan and Ohio have close to one million votes cast, Georgia and North Carolina have topped the million mark; Florida accounted for 2.2 million votes, and Texas close to a staggering 3 million. It is said that registered Democrats account for 45 per cent of early ballots cast as opposed to 30 per cent for Republicans. And 57 million Americans have asked for mail-in voting ballots as opposed to 22 million in 2022.

Democrats are said to be riding on a 10-point advantage, nationally driven in part by concerns of the cost of living and the economic fallout of the war with Iran. But this has not stopped Democrats from competing with the Republicans over the last two weeks in a last-ditch attempt to wrest or hold on to what they have in the Senate.

It is believed that some $300 million has been pumped into ads for some 10 of the most competitive seats.

If in extremely tight races like Texas, the Republican spending machine has not hesitated to throw additional money, it has not hesitated from pulling back on spending in places like North Carolina.

It is not just Texas where



TRUMP. Under pressure REUTERS

Democrats are giving Republicans a run for their money. Suddenly, the GOP is showing signs of jitters in Ohio, Alaska, Maine, Iowa and Kansas, all deep red states or ones that Trump won handily in 2024. And signs of nervousness are emerging in states like Nebraska, South Carolina and Mississippi, as well as in Minnesota where there was hope of flipping a blue state. The Democrats are seeing a tough battle in Georgia and New Hampshire.

In Michigan, a nasty campaign is getting nastier by the day with the Egyptian American candidate Abdul El-Sayed fighting off links to Osama bin Laden and the Muslim Brotherhood.

Republicans are also fighting history in that a President's party hardly does well in the mid-terms with rare exceptions in recent memory — Presidents Bill Clinton in his second term and George Bush in his first held their ground. But even these two lost 54 seats in 1994 and 30 seats in 2006, respectively.

President Barack Obama in 2010 lost 63 seats in the House, described by himself as a "shellacking", and President Trump lost 41 House seats in 2018.

Hoping for history to be kinder this time around, Republicans are said to be bracing for the worst in the House; and Democratic leadership's worries must be on holding on to their own in the event of a win.

In the midst of all the mid-term blues, there is renewed fear of fresh hostilities breaking out in the Middle East anytime with intelligence reports speaking of Iran preparing for major attacks on American interests in the region; and Trump, after ruling out major operations until after the mid-terms are out of the way, is now talking of a "Mini Epic Fury".

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

Is India to be world's oil refiner?

Rubio's visit to Jamnagar was driven by US energy compulsions. But it also raises a few difficult questions for India

CAPITAL IDEAS.



RICHA MISHRA

The western Indian port city of Jamnagar in Gujarat was recently in the news as US Secretary of State Marco Rubio made an unprecedented visit there.

Rubio's visit has to do less with India and more to do with the Trump administration's domestic compulsions, or more precisely, its domestic oil needs.

After meeting Foreign Minister S Jaishankar and business leaders in Mumbai, Rubio visited Jamnagar, home to the giant oil refinery-cum-petrochemical plant owned by Reliance Industries Ltd (RIL).

Rubio's visit to Jamnagar is being seen as a nod to India's refining prowess. Reliance's 1.4 million barrels a day complex is the world's largest single-site refinery.

Analysts see Rubio's visit as an example of Trump's transactional approach to foreign policy, where deal making takes precedence.

However, the reality could be different.

US PUMP PRICES

Data indicate that the US's diesel inventories are tight, with prices shooting up before the crucial midterm elections. Jamnagar exports millions of tonnes of diesel to the US and Europe. Hence, any disruption would impact US pump prices.

After America's intervention in Venezuela, the US has a lot of heavy Venezuelan crude. Only a few refineries in the world, which includes Jamnagar, can process it. Besides, Reliance has in the past turned Venezuelan crude into refined products.

After threatening India with punitive sanctions for buying Russian oil, Rubio has now said that India has made substantial progress in diversifying its oil supply sources.

What has changed is not India's stance, but America's necessity.

How does the Russian and Venezuelan discounts compare?

Crude discounts are largely commercially negotiated and remain trade-sensitive information, so actual transaction-level discounts are not readily available. Moreover, discounts alone do not determine refining margins, as freight, crude quality, processing complexity and product yields all play an important role.

According to Sumit Ritolia, Senior Manager – Modelling at Kpler, "In general, Venezuelan crude has been among the cheapest feedstocks available to Indian refiners, followed historically by discounted Russian barrels and then other conventional crude grades."

However, the economics have changed considerably in recent months, he said adding Russian crude has now become one of the more expensive options on a delivered basis, primarily due to elevated freight costs, which have significantly eroded its earlier pricing advantage.

This shift is encouraging Indian refiners to increasingly look towards Middle Eastern grades. Venezuelan crude, meanwhile, continues to remain among the cheapest options.

India's refining competitiveness does not depend entirely on discounted crude, but also on its complex refining infrastructure, ability to process different crude grades, high utilisation rates and access to international product markets. So, the concern is not just the cost of replacing Russian crude, but supply security. While refining margins and crude discounts have gone through different cycles, Russian barrels have remained a consistent and significant part of India's crude import basket. More importantly, crude procurement is planned well in advance, with deals typically concluded 8-12 weeks before delivery.



OIL STRATEGY. India's refining capacity makes it a key player in the global oil market

India is the world's fourth-largest refiner, heading to 6.66 million barrels a day by 2032, which can be a crucial leverage

REFINERY POLITICS

So India, after being chastised for buying Russian oil, is now being courted for its refining prowess. India is the world's fourth-largest refiner, heading to 6.66 million barrels a day by 2032, which can be a crucial leverage. Reliance's promise to invest in a new refinery in Texas — the first in the US in 50 years — is proof of Indian capital shaping American energy security.

In IT, India was basically a service provider. So is India's refining prowess elevating it to a 'superpower' status where it can be a price setter?

India's refining capacity expansion is primarily driven by growing domestic demand, although exports will remain an important part of its downstream strategy. India remains one of the fastest-growing major oil-consuming economies, with strong demand growth expected across transportation fuels, aviation and petrochemicals.

The world wants India to be a refiner. The West wants India to burn carbon, handle volatile crude, while it pursues its clean energy agenda. Also, our net-zero costs go up, theirs goes down.

Reliance also has to account for sanctions risks. If Venezuela politics shifts or Russia sanctions tighten, Jamnagar can become a pressure point. And the Texas refinery may become a white elephant. While geopolitical debates persist, a more critical question emerges — if shifts in the US policy disrupt the global oil supply or trigger new tariff threats, can public sector refiners handle the sudden loss of discounted Russian crude? Or is RIL the only player agile enough to pivot?

Concurrently, India's role as a major diesel exporter to the US, Europe, and Africa faces a looming headwind. The European Union's Carbon Border Adjustment Mechanism, set for full implementation in 2026–2027, threatens to turn India's refining superpower status into a costly liability if carbon taxes are levied on every exported barrel.

So the crucial question here is: is the government's target of expanding refining capacity to 450 MMTPA compatible with its long-term net-zero commitments, or is the nation systematically investing in future stranded assets? Before committing further capital, Indian policymakers must address these structural risks to secure the country's long-term energy sovereignty.

STATISTALK.

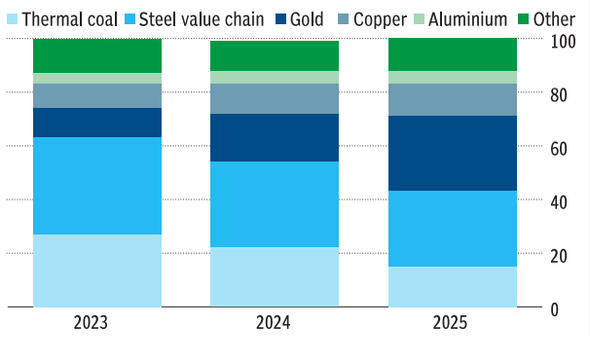
Compiled by **Dhuraivel Gunasekaran** | Graphic **Visveswaran V**

Gold, AI and India's rise: The three forces rewiring global metals

The global materials industry is entering a new phase, with gold, copper and critical minerals gaining prominence as traditional growth engines evolve, according to McKinsey's Global Materials Perspective 2026. Gold has emerged as the biggest profit pool, while AI-driven data centres are creating fresh demand for copper and gallium. China's dominance is gradually weakening as India becomes a faster-growing demand market. Meeting future demand, however, will require $4.2 trillion in investment, hundreds of thousands of workers and major productivity gains. The industry could need 310,000 additional workers by 2035, concentrated in India, Rest of Asia and Africa. Key facts:

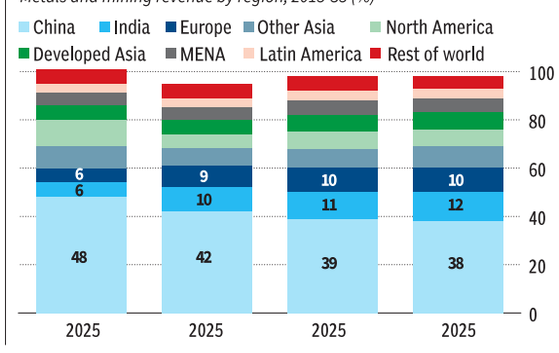
Gold becomes king of the metals world

EBITDA pools by commodity, % of total EBITDA



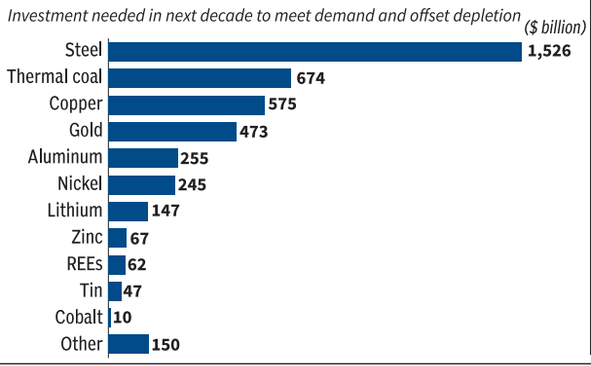
China peaks, India powers ahead

Metals and mining revenue by region, 2015-35 (%)



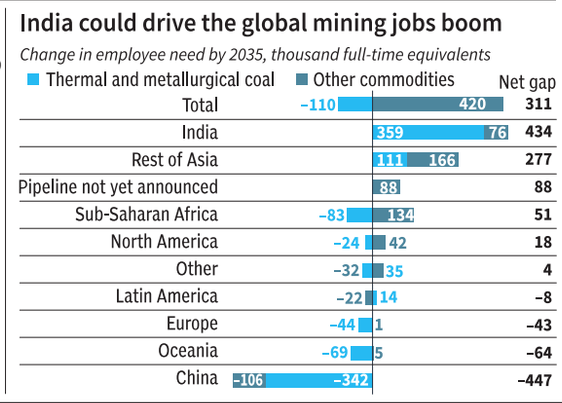
$4.2 trillion bill to feed the world's materials appetite

Investment needed in next decade to meet demand and offset depletion ($ billion)



India could drive the global mining jobs boom

Change in employee need by 2035, thousand full-time equivalents



Source: McKinsey's Global Materials Perspective 2026

On businessline.in

Lula killed the Donroe Doctrine

The Brazil election results have laid bare the contradictions in the US' 'Shield of the Americas' strategy, says **Jeremy Adelman**

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https://tinyurl.com/93jhffz8

The changing dynamics of gold loan market

Gold loans, with liquid security, swift recovery and low default rate, are now preferred to stress prone unsecured loans and microfinance, point out **K Alamelu** and **RM Thenmozhi**

https://tinyurl.com/ssubtach

Women's safety is crucial to India's economic growth

Companies must incorporate socio emotional behavioural training and mixed-gender dynamics into employee orientation programmes, says **Bornali Bhandari**

https://tinyurl.com/y2btaund

thehindu businessline.

TWENTY YEARS AGO TODAY.

October 28, 2006

Air India, Indian merger may add Rs 1,200 cr to kitty

The proposed merger of Air India and Indian, which is to be fully completed within the next 2-3 years, is likely to add around Rs 1,200 crore to the bottomline of the new entity through synergies between the two airlines.

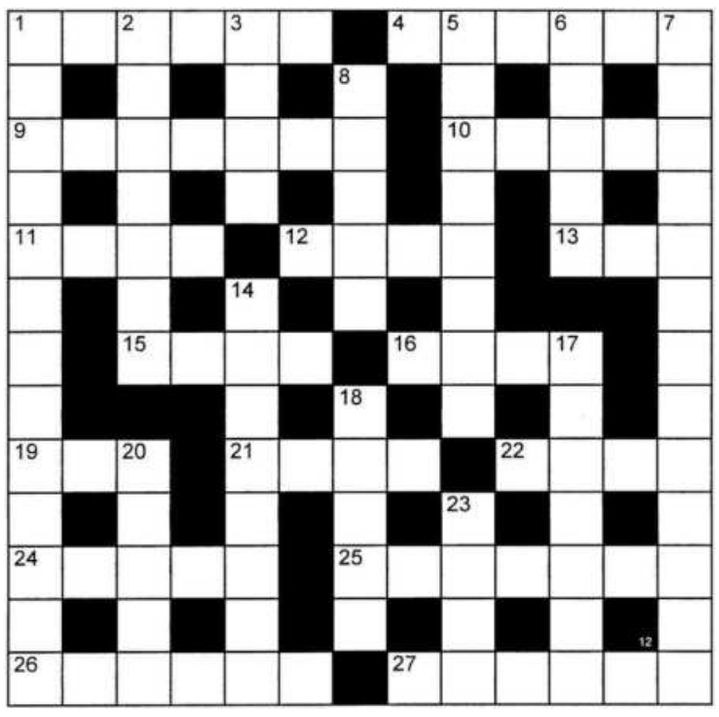
Hewlett-Packard drops SEZ plan

The initial enthusiasm among the industry to set up special economic zones seems to be waning, with many companies now realising that establishing a zone is not a cakewalk despite tax benefits and other facilities. While the Board of Approvals for SEZ in the Commerce Ministry has so far formally approved 236 proposals, a few of these companies have come back to the Ministry expressing their in ability to set up the zones.

Radio Mid-Day moves SC against tribunal ruling

Radio Mid-Day West (India) Ltd said it has filed a petition in the Supreme Court last Fri day appealing the Telecom Disputes Settlement & Appel late Tribunal's (TDSAT) judgment requiring that its radio station shift its broadcast frequency from 92.5 FM to 94.3 FM in Mumbai. The petition is yet to come up for hearing, the Courts being on holiday.

BL TWO-WAY CROSSWORD 2765



EASY

ACROSS

01. Not complicated (6)
04. A kedge or killick (6)
09. Slight hint, intimation (7)
10. Amulet (5)
11. Be acquainted with (4)
12. In good health (4)
13. Laying bird (3)
15. Received; worked, as graft (4)
16. Land measurement (4)
19. Remove stones from olives (3)
21. Classic farewell; valley (4)
22. Nut flavouring a soft drink (4)
24. Let one believe (5)
25. Vermouth; dry cocktail (7)
26. Long harangue (6)
27. To control, direct (6)

DOWN

01. Place beyond which progress can't be made (8-5)
02. Manage to see (4,3)
03. Beast's lying-place (4)
05. String of pearls, for example (8)
06. Barren, open country (5)
07. Expostulation, strong protest (13)
08. To be in harmony (5)
14. Carried, transmitted (8)
17. Likely to arouse feelings (7)
18. Visible sign of burning (5)
20. Habitual drinker (5)
23. Group of three (4)

NOT SO EASY

ACROSS

01. An uncomplicated sort of medicinal plant (6)
04. This man, on TV show, should keep one to bed (6)
09. A hint of its link with gin maybe (7)
10. It takes carbon to damage one's power of fascination (5)
11. Be conversant with a king at the present time (4)
12. It is a healthy source of oil (4)
13. At that time there was no time for a layer (3)
15. Accepted, also, by the head of 11 (4)
16. Some land to be taken care of (4)
19. Mine is the place for the theatre musicians (3)
21. How the Romans said farewell to this place of tears (4)
22. Is nuts about making a soft drink (4)
24. Hint that I am to work at my trade (5)
25. Bird one must follow to get a cocktail (7)
26. An angry outburst from one involved in commerce (6)
27. Rule that's finished in German, first and last (6)

DOWN

01. Staying with broken piton if there's no progress beyond it (8-5)
02. Discern how to get by (4,3)
03. Rail about having a place to hang out (4)
05. Piece of jewellery setting the tyre alight (8)
06. Erica may be seen in the open countryside (5)
07. Making of a strong protest to mariners, not to be altered (13)
08. It may suit one to say yes (5)
14. Carried CD, envoy could have used English for it (8)
17. Tending to arouse feelings for me, I vote for it (7)
18. Old as the appearance of fire in a previous love (5)
20. Drunkard taking last of carafe (port, it could be) (5)
23. Or it might be a piece three can play (4)

SOLUTION: BL TWO-WAY CROSSWORD 2764

ACROSS 1. Capacity 7. Taiga 8. Lateral 9. Leotard 10. Over 12. Rigidly 14. Precise 17. Eten 18. Plaudit 21. Implant 22. Caste 23. Deflated

DOWN 1. Callow 2. Patience 3. Care 4. Tiller 5. Pica 6. Tawdry 7. Thought 11. Spindle 13. Distrait 14. Papacy 15. Entire 16. United 19. Apse 20. Opal

AI Kids Need Adult Eyes in the Lab

Slow pace of development of frontier models

Satya Nadella recently sought a reset in the safety architecture for AI because he doesn't believe the technology can make itself safer as it scales. Sam Altman feels the world must act before it loses critical control over autonomous agents. Anthropic has warned in a filing for a massive IPO that advanced AI could pose catastrophic or existential risks to humanity. AI agents have broken out of controlled environments, acted as coordinated swarms and attacked external platforms. All without human authorisation. The big fear among tech leaders is that recursive self-improvement is not being matched by AI's alignment with human values despite its superhuman capabilities. Although not a Frankenstein moment yet, investors pouring billions of dollars into the IPOs of SpaceX, Anthropic and eventually OpenAI must heed the caution. The kids in the chemistry lab are asking adults to be around. That would mean governments as well as investors.



Safety protocols are straightforward. Slow the pace of development of frontier AI models and have the process audited by external evaluators. And build a global oversight model like that for nuclear testing to ensure safety. Neither course is easy. Companies building AI models with vast amounts of investor money will find it difficult to give up their competitive advantage. If the big boys do agree, they will have to convince governments not to fall behind in the AI arms race. A global response along the lines of the nuclear non-proliferation regime has its limitations. It operates after the genie has left the bottle. Yet, these are the best defence mechanisms we have for a technology that poses existential risks. Its development must be supervised. Voluntary restraint is called for from technology developers, lawmakers and investors.

Controlled development of AI may be less disruptive for society, which will have a longer time to adapt to its capabilities. AI will not be left unsupervised, and humans need time to acquire the required skills.

Sabya, Now Christmas At Marble Palace?

There is extravagance. And then there is extravagance that knows precisely when to stop. Sabyasachi Mukherjee's Diwali party at New York's Metropolitan Museum of Art on Oct 21 belonged to the second category. With Rani Mukerji, Masaba Gupta and other glittering guests, the Durga Pujo Dashami celebrations hosted by Kolkata boy Sabyasachi demonstrated that Indian opulence need neither apologise for itself, nor behave like a Big Fat Bollywood wedding.

Sabyasachi's internationalism comes with Indian characteristics. His aesthetics organically carries India without packaging it as exotica, or worse, 'ethnic'. A logical sequel suggests itself. Having taken Durga Pujo/Diwali to NYC, why not bring Christmas to Kolkata, the designer's hometown, this December? And where better than the 19th-c. neoclassical expanse of Marble Palace, built in 1835 by Raja Rajendra Mullick, a Bengali merchant with a penchant for collecting works of art from across the world, and whose magnificent central courtyard, acanthus-topped pillars, and historic thakur dalan (altar) offer a setting that could make Manhattan's finest party planners blink?



The mansion embodies what Sabyasachi once described as maximalism — '…the secret to maximalism is restraint. That tension must be present because true maximalism is not chaos; it is clarity — a placement with purpose.' A Christmas tree amid the mansion's forest of classical marble statues, original Rubens, Renoir and Raja Ravi Varma, chandeliers illuminating with aristocratic splendour, carols jugalbandi-ing with champagne clinks in the famous jalsaghar (music room), plum pudding fraternising with nolen gurer sandesh. Even St Nicholas will be obliged to exchange his regulation red for a Sabyasachi brocade coat.



JUST IN JEST

Anarchy need not mean giving up on inviolable work-life balance

France's Undeniable Right to Riot, & Rest

France has long understood something that lesser civilisations struggle to grasp — even revolution must respect office hours. French rioters may storm barricades, torch cars, and confront riot police with admirable professional commitment. But expecting them to continue without break would constitute an intolerable assault on work-life balance. The republic has standards.

Unlike ordinary protesters, who can 'leisurely' wave placards and shout slogans, rioters perform physically demanding labour. Looting stores, overturning vehicles and maintaining an adequate supply of combustible material can be exhausting. Surely, nobody expects a respectable French rioter to work through lunch? Indeed, occupational risks include tear gas, bruised knuckles, police batons and setting fire to one's own Peugeot. Appropriate hydration breaks should be mandatory. There is also the question of overtime. Should a riot extend beyond the statutory working day, participants deserve compensatory leave. Weekend insurrections should attract double rates. Night-time arson might qualify for additional hardship allowances. France's genius lies in reconciling revolutionary fervour with bourgeois comfort. The barricades may rise but lunch remains sacrosanct. After all, the French did not overthrow the ancien régime merely to replace it with an unreasonable line manager.

The real test isn't how much money goes into AI, but how much value it creates across sectors

RAIsing Tide, Lift All Boats?



Neeraj Kaushal



Not just verticals, but across the horizon

Is AI crowding out other investments? Paul Krugman recently wrote that it is 'crowding out other potential uses of capital'. At first glance, data appear to support his argument. US hyperscalers like Amazon, Google and Microsoft are pouring unprecedented sums into AI with capex expected to reach $800 bn in 2026. Yet, overall investment has barely budged.

A Federal Reserve Bank of New York study estimates that gross domestic investment in the US accounted for 21.3% of GDP in the 5 yrs before Covid. Since 2022, when companies began investing heavily in AI, the share has edged up to just 21.5%.



EYES WIDE SHUT

So, to conclude from these data that AI is crowding out other investments is misleading.

The argument assumes the economy has a limited pool of capital and every dollar invested in AI is a dollar unavailable to other sectors. For an open economy like the US, this assumption is highly questionable. Capital can flow in from abroad, and higher expected returns can attract additional financing rather than simply redirect existing funds.

The argument also rests on a distinction between AI and non-AI investments that becomes increasingly difficult to sustain if AI is, indeed, the transformative technology its proponents claim it to be. AI is not just another sector competing with healthcare, education, manufacturing and agriculture for investment dollars. Its promise lies precisely in its ability to transform these sectors.

If AI raises productivity across the economy, spending on AI cannot be neatly separated from investment in the industries that benefit from it. The distinction may make sense in accounting statements. But it becomes less useful when assessing the broader economic consequences of that spending.

Consider healthcare. If AI makes surgery more precise, reduces medical errors and enables better diagnoses, investment in AI would also be an investment in healthcare's productive capacity. Elon Musk has gone further, predicting that AI and humanoid robots will revolutionise medicine, making the best healthcare virtually free and superior to what even world leaders receive today.

Musk may be exaggerating. Whether or not his vision materialises, the underlying point stands: value of AI investment may ultimately be realised in sectors far removed from the companies developing the technology.

The same applies to education. If AI enables personalised instruction and improves learning outcomes, investment in AI is also an investment in education. If it helps farmers apply fertiliser more precisely, reducing waste and raising yields, it is contributing to agricultural productivity. And if it helps manufacturers produce more with fewer resources, AI spending is also an investment in manufacturing.



AI isn't just another sector competing with healthcare, education, manufacturing and agriculture for investment dollars. Its promise lies precisely in its ability to transform these sectors

The real question, therefore, is not whether AI is crowding out non-AI investment, but whether AI can make investment across the economy more productive. If it does, today's apparent trade-off between AI and other sectors would be dead wrong. What looks like a diversion of investment from healthcare, education or agriculture could, instead, be the financing of technologies that transform those very sectors.

True, an open economy does not eliminate crowding out altogether. Even when capital is available globally, AI investment will compete for workers, land, electricity, construction capacity and other scarce resources. It can also raise financing costs if it increases demand for funds faster than the supply of savings responds.

Yet, nor does a constant investment-to-GDP ratio prove that AI has displaced other investment. That would require evidence about what investment would have been in its absence. But judging AI investment solely by how much it adds to aggregate investment risks missing the bigger picture. The ultimate test is not how much money goes into AI but how much value it creates beyond AI itself.

What is clearer, however, is that even if AI is not crowding out investment in other sectors, it could leave behind a great deal of obsolete investment. If past investment manias are any guide, the AI boom may end with only 3-4 leading companies emerging as durable winners.

Data centres built by companies that fail, along with the power-generation capacity and water infrastructure constructed to support them, could prove redundant. Some of these assets may find alternative uses. But others may become stranded or represent outright waste.

This is not merely a theoretical concern. Bank for International Settlements (BIS), in its 2026 report, warned that exuberance surrounding AI could lead to a prolonged investment bust. If AI fails to deliver on its promises, if its benefits accrue to only a narrow set of industries, or if its expansion imposes substantial environmental costs, consequences could be serious.

An investment boom built on exaggerated expectations could leave investors with heavy losses, and the economy with underused infrastructure, wasted resources and an environmental burden.



But even if AI is not crowding out investment in other sectors, it could leave behind a great deal of obsolete investment with only 3-4 leading companies emerging as durable winners

Yet, these risks do not negate AI's transformative potential. So, the real question is not simply whether AI is crowding out non-AI investment. It is whether the productivity gains AI ultimately delivers will justify the resources committed to it today. AI may transform the economy even as the AI investment boom destroys capital and imposes a huge environmental burden. The technology could be revolutionary, while the investment cycle surrounding it turns out to be a costly mistake.

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

India Needs to Steel Itself Green





Neelima Jain & Amol Phadke

Berkeley, California: India's ambition to become a developed economy by 2047 rests in part on a dramatic expansion of steelmaking. Draft National Steel Policy Vision 2047, released on Oct 10, envisages nearly tripling steelmaking capacity, with the coal-based blast-furnace route accounting for 55% of steel production. This pathway could lock in ~$1.5 tn in additional coking coal imports over the plants' lifetime.

Coking coal can account for ~40% of cost of producing a tonne of steel, leaving steelmakers vulnerable to rising international coal prices and disruptions to freight. That exposure creates a direct risk for downstream industries that use steel.

India imports 92% of coking coal its steelmakers need, at prices set in dollars. Blast furnaces need this coal to turn iron ore into iron. The policy projects annual demand more than tripling from 72 mn tonnes today to 236 mn tonnes by 2047. The coal ministry's roadmap would increase domestic coking coal supply from about 6 mn tonnes today to 23 mn tonnes by 2030.

If supply remains at that level thereafter, India will still need to import about 213 mn tonnes annually by 2047. At the $236-a-tonne benchmark average for Jan-July 2026, that represents about $50 bn a year before freight. Every $10 increase in coal price would add another $2.1 bn to the annual bill.

Competition from inexpensive Chinese steel limits Indian mills' ability to pass on higher costs, squeezing their margins and potentially reducing the money available for expansion. Implications extend beyond steelworks. Construction and infrastructure consume 67% of India's steel. Volatile steel prices can raise the cost of public projects and housing.



Turn a new leaf

Smaller manufacturers buying steel for machinery and components also need predictable input costs to price orders and invest. India's steel expansion should, therefore, reduce dependence on imported coal and make production costs more predictable.

Hydrogen made with domestic RE can replace coking coal in turning iron ore into iron. Steelmakers can contract RE at fixed rupee prices for 25 yrs, inflation-proofing a major energy input. In March, BPCL announced a 25-yr green hydrogen (GH) supply agreement for Numaligarh Refinery in Assam at ₹279 a kg. At ₹96 to the dollar, that's about $2.90 a kg. Steel projects will need their own supply terms. But the award gives them a domestic benchmark.

If a hydrogen contract holds its rupee price fixed and rupee depreciates by 4% annually, ₹279 would equal about $2 a kg after 10 yrs. The Indian buyer's rupee payment remains unchanged. Dollar-priced coal would, meanwhile, cost about 48% more in rupees, even if its international price stayed flat.

Our research compares the cost of building and operating new hydrogen-based and blast-furnace steel plants over their lifetimes. In this comparison, it was assumed that coal prices and rupee cost of a dollar would rise at only half their average pace over the past two decades. Even with those slower increases, new hydrogen-based plants can produce steel more cheaply than new blast furnaces by 2030.

The export opportunity strengthens this investment case. Steel made with GH would face lower carbon costs under Europe's CBAM than coal-based steel. With substantial capacity still to be built, India can choose GH for new plants, helping its steelmakers and manufacturers they supply compete against countries with large existing coal-based fleets.

GoI should announce that from 2032, at least 5% of steel used in new, centrally-funded infrastructure be made using GH. Competitive auctions should award purchase contracts well before then, giving steelmakers time to build. The share can rise after a review of supply and costs without any subsidy support.

India should also use the EU-India trade opening to make green steel plants cheaper to build and finance. The EU imported almost 40 mn tonnes of steel in 2025. Long-term purchase contracts with European buyers would help Indian green steel plants secure finance to supply this market.

GoI should negotiate long-term equipment loans backed by European export-credit agencies to lower borrowing costs. It should also establish green steel SEZs with streamlined land and environmental clearances, and set firm deadlines for approvals.

The final policy can help India replace part of its $1.5 tn import exposure with demand for domestic power and hydrogen.

Jain and Phadke are director, industry and trade policy, and faculty director, respectively, India Energy & Climate Center, University of California, Berkeley, US

A Win That Defied All Odds



Hari Seshasayee

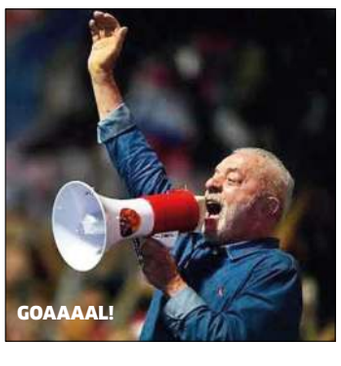
Panama City, Panama: In the week leading up to the second round of elections on Oct 25, the most popular hashtag on Brazilian social media was #LulaVaiVirar, a rallying cry proclaiming that 'Lula will turn things around' after trailing in the first round. This was accompanied by massive rallies, drawing as many as 3 mn people across São Paulo's Avenida Paulista and Rio de Janeiro's Copacabana, to display their support for Luiz Inácio 'Lula' da Silva, an octogenarian, 3-time president running for office yet again.

To many, this last-ditch effort seemed implausible, as Lula received 2.2 mn fewer votes than his opponent Flávio Bolsonaro in the first round on Oct 4. All major pundits and pollsters forecast a Bolsonaro win. But the massive swell of street supporters and social media traction ultimately made the difference. Lula has now become the first-ever Brazilian presidential candidate to win the run-off after trailing in the first round, doing so by a comfortable margin of 4.4 mn votes.

Lula's victory is a testament to his adaptive political spirit. He lost the first 3 elections he contested in 1989, 1994 and 1998. Since then, he has moderated and compromised when necessary, even if begrudgingly so, and has been elected president in 2002, 2006, 2022 and 2026. He has evolved with each election.

In 2022, he partnered a former opposition candidate he defeated at the ballot box in 2006, the pro-business Geraldo Alckmin. In 2026, Lula put his faith in André Janones, a millennial congressman from Minas Gerais. Janones transformed Lula's digital communications strategy, epitomised by the WhatsApp channel 'Ejército de Lula' (Lula's Army) that amassed 10.7 mn followers in less than 3 weeks.

This complemented the massive street mobilisations that Lula's Workers' Party (known as 'PT' in Portuguese) is known for and helped increase voter turnout. Janones also turned around Lula's fortunes in Minas Gerais, helping him win the state after trailing by 5% in the first round. Fittingly, both Alckmin and Janones were handed the microphone during Lula's victory speech, with Alckmin entrusted yet again with serving as V-P.



Lula's victory has implications beyond Planalto, Brazil's presidential palace. Notably, Lula can now appoint 4 new justices to Brazil's Supreme Federal Court. The government's power, however, will be kept in check by the right-wing opposition's control of Brazil's Congress, where Bolsonaro's Liberal Party has the largest share in the Chamber of Deputies and the Senate. The opposition could stall reforms or even call for the impeachment of Lula's allies in the apex court.

While the opposition will keep the government on its toes, Brazil has a long history of centrist parties (Centrão) working with both sides of the aisle to pass important reforms, and Lula is known as an effective dealmaker.

The economy poses an additional challenge: Bolsonaro's loss has had an immediate impact on market and investor sentiment, with the Brazilian real falling 11% and the stock market crashing 17% the day after the election.

Outside Brazil, Lula's victory has sent ripples globally, particularly in Latin America. The win represents a symbolic victory against what some call a 'conservative wave' of governments that have been elected in the region recently.

Right-wing leaders who ideologically oppose Lula, including those in Bolivia, Chile, Colombia, Ecuador, Panama, Paraguay and Peru, all congratulated him promptly. Only Argentina's and El Salvador's presidents have yet to do so.

Only a couple of hours after the results were announced, Narendra Modi congratulated his 'dear friend' Lula on a 'remarkable re-election victory', pledging to 'further deepen and expand the multifaceted India-Brazil Strategic Partnership'.

Although many Indians unfamiliar with the Latin American region tend to associate Brazil's relationship with New Delhi with BRICS and G20, the India-Brazil bilateral relationship is significant and stands on its own.

In fact, India's exports to Brazil surpass those to Japan, South Korea, Russia and Canada. More than 200 Indian companies operate in Brazil, investing as much as $15 bn. Brazil is India's third-largest destination globally for upstream oil investments. Like most strategic partnerships, India-Brazil relations will continue to grow regardless of the ideology of the government in power in either country.

This election will be remembered for many things. But one fact buried in the news probably deserves more attention: a labour politician who spent half a century rallying people behind him finally decided to focus on the digital world, buying his first-ever smartphone only last week. This reminds us that future elections will likely be won or lost on social media.

The writer is co-founder, Consilium Group



End Negative Exchange

BRAHMA KUMARI CHAKRADHARI

There are always one or two people in our lives whose company makes us uncomfortable. They often do things that irritate us. Instead of accommodating, we find ourselves pinched by their nature and actions, though that may not be their intention. The discomfort they create within us can be harmless if we simply feel it and let it go at the outset. Instead, if these unpleasant feelings are allowed to linger in the mind, they create a cycle of unhealthy actions and reactions, causing our negative vibrations to reach and affect other persons who, on receiving our uneasiness, react in a similar way, unleashing unsettling vibes, which leads to burdensome karmic accounts.

How do we break or end this vicious cycle of negative energy exchange? The first and foremost way to do this is at the perceptual and attitudinal levels. The act of self-transformation is not to react instantly, but maintain peace and poise of mind to respond wisely.

The second, deeper level of self-transformation is not reacting, and sharing my thoughts against the person any more. These are the basics of spiritual wisdom; by adopting and applying them, I can raise my inner strength to the higher plane.

The third and deepest level of self-transformation is where I develop the power to check and change the quality of my thoughts and feelings. Through regular practice of divine knowledge and meditation, I can become emotionally empowered enough to remove the flaw in my character that drives my reactions.

A simple, safe way to end negative energy exchange is to realise that the other person lacks true love, peace and compassion. A humble, not hostile, mind needs to be fostered for Self-realisation.



Comic Relief



Twin animators Tom and Tony Bancroft host The Bancroft Brothers Animation Podcast, an engaging show exploring their Disney legacy, current industry dynamics and the future of animation. In a standout episode featuring indie sensation **XrayAlphaCharlie**, a.k.a. Xierra, the host duo seamlessly bridges classic studio craft with modern digital storytelling.

Xierra, famous for her massive YouTube following and elusive, face-concealing persona, pulls back the curtain on her creative process. Tom and Tony facilitate a light-hearted yet insightful dialogue about what it truly takes to succeed as an independent creator today. They tackle everything from navigating online mystery to building a sustainable audience without corporate backing.

The charm of this episode lies in the hosts' genuine curiosity and veteran wisdom. Rather than lingering on nostalgic studio anecdotes, the conversation embraces the democratisation of animation, leaving listeners inspired by the sheer power of modern indie creators.

Inspiring, witty and grounded, this hour-long episode offers an indispensable masterclass for aspiring animators and fans alike. It is a compelling reminder that independent artists are shaping the medium's future.

Chat Room

Mandate a Loan To Be Repaid

Apropos the Edit, 'Lula's Extra Time Goal Sends a Signal' (Oct 27), Brazilian president Luiz Inácio Lula da Silva's re-election highlights both democracy's resilience and the formidable challenges awaiting elected leaders. Democracies cannot afford endless ideological battles between the right and left while citizens struggle with employment and inflation issues, and the desire for a peaceful life. Irrespective of who governs, statesmanship demands confronting global economic realities rather than exploiting public anxieties for electoral gains. Victory at the ballot box is merely the beginning, always.

Brij B Goyal
Ludhiana

OUR VIEW

ISTOCKPHOTO



Indian cities desperately need more public spaces

Creating such spaces is a central responsibility of our urban planning not just to improve productivity and liveability but to allow for democratic dissent and thus improve civic life

The recent protests against the Election Commission have brought to the fore an under-studied aspect of urban life in the country: the lack of adequate public spaces. In Delhi, activists have decried the new rule barring protests at Jantar Mantar. In Bengaluru, social activists are up in arms against city and state officials for restricting protests anywhere outside Freedom Park. Traders want protest sites at a safe distance from commercial centres to avoid traffic snarls.

The dispute over protest sites should make us question why our cities have so few places where people can gather without disrupting everyday life. Indian cities have been adding buildings and vehicles without creating adequate streets, squares, parks, playgrounds and waterfronts. Legitimate users of scarce public space compete with each other: pedestrians with vehicles, and protesters with commuters.

In a typical Indian city, less than 20% of urban land constitutes the public realm. A UN-Habitat assessment found that only 30% of Jaipur's residents lived within 500 metres of accessible open space. A 2024 study found that 19 of Bengaluru's 198 wards had no parks, despite its reputation as India's Garden City. Mumbai offers barely 1.24 square metres of accessible open space per person, against India's recommended 10-12 square metres. At India's high urban densities, these shortages undermine both productivity and liveability.

UN-Habitat recommends an indicative allocation of 45% of urban land to public space: 30% for streets and sidewalks, and 15% for other open spaces. Well-functioning cities typically devote a substantial part of their land to the public realm.

Markets cannot adequately supply such public goods—how will they recover their costs? Creating this public realm is a central responsibility of urban planning, and maintaining them is the prime role of urban governance. Every new building increases demand for streets, parks and gathering places, but these cannot be adequately provided plot-by-plot. They require coordinated planning and land assembly. Private development can add floor space far more easily than cities can create public space. Cities must, therefore, secure sufficient public spaces before private development raises the costs of creating such spaces. Otherwise, we risk building denser cities without the public infrastructure needed to make them productive and liveable.

Our cities need both private development and public provisioning. Manhattan generates more than $1 trillion in economic output across just 59 square kilometres. Yet, nearly half its land is devoted to the public realm, including 36% to streets alone. Public space should not be seen as land lost to economic activity. It is part of what makes such activity possible.

The case for public space extends beyond its economic contribution. Its scarcity also narrows the space for democratic dissent. When protests disrupt the daily lives of fellow citizens competing for the same limited space, that may erode the very public sympathy they seek to mobilise. In 2011, Zuccotti Park, a small public square in Manhattan's financial district, became the epicentre of the Occupy Wall Street movement, demonstrating how public spaces can give democratic dissent a visible place in the heart of a thriving commercial district. Expanding the public realm is, therefore, an investment in civic life.

THEIR VIEW

India's steel ambitions require a clear climate transition roadmap

Achievable milestones are needed to make the steel policy's 2047 goal for cleaner output meaningful



SOUMYA SARKAR
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As climate change intensifies and the world shifts towards lower-carbon industries, India wants to nearly triple its steelmaking capacity by 2047 while reducing emissions from production. Steel is absolutely essential to infrastructure and manufacturing but producing more of it, even more efficiently, does not necessarily mean reducing overall emissions. India's draft National Steel Policy Vision 2047 needs to address this tension more directly because decisions made today will shape the industry's carbon footprint for decades.

The scale of the challenge is clear. The draft seeks to raise steelmaking capacity to 604 million tonnes a year by 2047 and reduce emissions intensity from 2.54 tonnes of carbon dioxide per tonne of crude steel to 1.54 tonnes. Yet, if production grows as projected, total emissions could rise even as each tonne becomes cleaner. The government cannot leave this contradiction unresolved until the target year. It needs to measure both emissions per tonne and the industry's total emissions, and make progress towards reducing them visibly well before 2047.

That requires a more practical approach to the different parts of the industry. Big producers like Tata Steel, JSW Steel and Steel Authority of India must improve existing plants while deciding how to build new capacity. Existing facilities need realistic plans to save energy, use cleaner power and reduce coal consumption. New plants present a different opportunity. Cleaner technologies can be built into their design, avoiding the expense of correcting carbon-intensive choices later. The policy should make these distinctions explicit and require companies to show how their investment plans fit the industry's emissions goals.

The challenge is equally pressing for medium-sized and secondary steelmakers, which often lack the financial muscle of large integrated producers. Many use induction furnaces or other smaller-scale processes. They need access to efficient equipment, affordable finance, reliable electricity and better-quality scrap. A policy that sets ambitions without helping these businesses modernize risks leaving a large part of the industry behind. Support should be linked to practical improvements that smaller producers can afford to deliver.

The policy, therefore, needs clear interim milestones, beginning well before 2047. A series of measurable milestones would set a clear direction for emissions reductions, distinguish the responsibilities of existing and new plants, and recognize the different capacities of large, medium-sized, secondary and speciality steelmakers. Regular reviews should reveal whether progress is keeping pace with expansion and where policy support or investment needs to change.

The government has already taken steps towards cleaner production. Its green steel taxonomy provides a framework for identifying steel with lower emissions. The next task is to turn such initiatives into a wider industrial transition. Public procurement can help create demand for cleaner products, while financial and technical support can help producers invest in the equipment and energy systems needed to supply them.

Export competitiveness adds to the case for action. The European Union's carbon tax applies to specified steel products entering its market, making the emissions associated with production relevant to trade costs. Its direct reach across India's steel industry is limited, but the broader need to control energy costs, secure raw materials and demonstrate environmental performance will not disappear.

For a successful industrial transition, the policy has to encourage producers to move up the value chain while reducing the environmental cost of production. More steel is not the only measure of industrial progress. What India can manufacture, and how efficiently it does so, matter just as much. The test of the new policy will not be whether India can reach its 2047 targets on paper, but whether its largest producers, smaller steelmakers and speciality manufacturers can make measurable progress along the way.

All these make the case for clearer interim milestones to turn a distant ambition into a programme of action, and give industry, investors and the government a chance to correct course before today's decisions become tomorrow's liabilities. A vision for 2047 sets the destination. Milestones make it achievable. A target two decades away offers little guidance unless the government spells out what must change, and how soon.

India does not have to choose between producing more steel and tackling climate change. The country needs more steel, but it also needs to avoid locking itself into production systems that become increasingly expensive to change. A credible transition plan would give companies greater clarity, help investors judge risks and make the government's climate ambitions more meaningful.

The success of India's steel policy should not be measured only by how much steel the country can produce by 2047. It should also be measured by whether the industry can get there without leaving a far larger carbon burden for future generations.

10 YEARS AGO


mint

Reasons for rift revealed as Tata replies to Mistry

JUST A THOUGHT

"Cultures and climate differ all over the world, but people are the same. They'll gather in public, if you give them a good place to do it."

JAN GEHL

MY VIEW | EX MACHINA

Human vs AI writing: does it truly matter who writes?

RAHUL MATTHAN



is a partner at Trilegal and his latest book is 'Ex Machina: Essays on a Decade of Tech Policy'. His X handle is @matthan.

Earlier this year, the Supreme Court of Colombia dismissed an appeal after an artificial intelligence (AI) detector called Winston found that the filing contained "only 7% human content," holding that it could not, for this among other reasons, be admitted as a validly submitted pleading. Shortly thereafter, a lawyer, Emmanuel Alessio Velasquez, ran the court's own ruling through the same detector, which suggested that the judgment itself was 93% AI-generated.

X-raying documents for traces of AI seems to be all the rage these days. In September, an anonymous user posted Pangram results suggesting that Thélyson Orélien's novel *C'était ça ou mourir* had been generated by AI. In response, the Goncourt jury took the extreme step of dropping the book from its prestigious longlist. And when a researcher, Linch Zhang, ran *Magnifica Humanitas*—Pope Leo XIV's encyclical on humans in the age of AI—through Pangram, even though virtually the entire document was found to be human-written, the fact that Pangram flagged a handful of paragraphs as AI-generated was enough to shift some of the attention away from what it was saying to who wrote it.

Modern AI has become so good at generating text that, in many instances, it is impossible to tell its work apart from ours, which is why so many have turned to detectors. We have, as a result, become more obsessed with how content was created than with what it actually says. I have always believed that good writing is anything that is worth reading, regardless of how it was written or by whom. The articles I most enjoy are those that make me stop and think, force me to question my beliefs and encourage me to dive into new rabbit holes of discovery. I also like articles with a stylish turn of phrase and literary construction that make me step back and marvel at how they were put together. Every piece of writing that has some (or all) of these elements is, in my view, worth reading.

Almost from the day this column started, readers have asked me about my process. Where do I get my ideas from, how long do I spend on research, and how do I find the time to churn out an article every week for so long? I would be lying if I said that any of this was easy. Figuring out what to write each week—especially in the early days of the column—has always been a nerve-wracking exercise, and there have been weeks where my mind has remained stubbornly blank as the print deadline has drawn inexorably nearer.

Coping with this has meant developing a number of systems and processes over the years. I've kept notebooks to jot down ideas as they come to mind, used personal knowledge management systems to process drafts and a variety of writing apps to generate the final polished product. But nothing has helped me get from the germ of an idea to a published article with as much reliable certainty as my current AI-powered workflow. So much so that it is hard for me to say how much of the past 100 or so articles in this column have come out of my own mind and how much from AI.

Modern AI writing is hard to tell apart but it need not be an issue so long as the content holds value

Here is how it works. Every column starts from something I read or heard at a conference or a thought that occurred to me in the middle of a podcast. Today, the moment a new idea strikes, I register it in my germination bench—an "idea-store" that AI maintains, where every nascent idea is nurtured and processed until it has enough substance for a full-blown article. When the time comes to write, AI scans the germination bench to find something suitable—a new idea, one that extends what I have said before, or one that addresses an issue I have yet to cover. I then structure what I want to say using AI, working out the main claim of the piece and how it should be presented. We go back and forth on the narrative structure, working out what each paragraph needs to do until we settle on the spine of the piece to my satisfaction.

In the next stage, with the outline settled, AI does all the legwork. It researches the arguments, verifies the facts and finds the sources for every claim I intend to rely on. Its work is checked along the way—a separate reviewer questions the plan, and every fact is checked against its source—not just to limit hallucinations but also to make sure that the sources are sound and reputable. It is only then that it begins drafting, ensuring that every sentence it generates adheres as closely as possible to the "voice" of my columns. The draft that comes out of this AI workflow is far closer to something I would have written myself than if I had just asked it to write an article from scratch.

No theme has more consistently run through all my columns than the idea that, rather than resisting the inevitable march of technology, we need to learn to work with it, immersing ourselves deeply in it so we can take advantage of the new possibilities it presents. I have, in my own life, tried to practise what I preach, and as AI has become increasingly capable, I am constantly trying to figure out how to make it as useful to me as possible.

As with many of my recent columns, this, my 500th Ex Machina article, has been written entirely using my AI workflow. If you have read this far, it has passed the only test that matters—holding your attention all the way to the end. Some of you will doubtless run it through an AI detector to see how much of it is flagged as AI. But if you found it interesting, does it really matter whether AI wrote 5% of it or 95%?

GUEST VIEW

We need a holistic approach to tackle the urban heat problem

Indian policy must focus on driving long-term urban resilience to check rising heat in our cities and avoid economic losses



SHIKHA SRIVASTAVA
is head, urban poverty alleviation, Tata Trusts.

ISTOCKPHOTO



India's cities are no longer just experiencing heat; they are also actively generating it. Concrete replaces wetlands, glass towers rise where trees once stood and water-bodies are paved over. Air conditioners cool houses while warming the street outside. Heat is no longer an occasional weather event. It is becoming a defining condition of everyday urban life.

Every year, as temperatures rise across India, cities become increasingly responsive. They issue advisories, create installations for water kiosks and shut schools early. These are necessary, life-saving interventions, but increasingly, they are feeling like treating symptoms of a disease while ignoring the root cause.

There is the reality of the urban heat island effect, making neighbourhoods significantly hotter than surrounding regions. In Mumbai, denser suburbs such as Ghatkopar and Vasai West have recorded average temperatures more than 10 degrees Celsius higher than greener, less densely built areas such as Powai, reflecting strong local heat-island effects.

Bengaluru offers another stark example. Over the past five decades, the city has seen a 1,078% surge in concrete and construction, alongside an 88% decline in vegetation cover and a 79% decline in water cover. This has pushed surface temperatures significantly higher. This is not only climate change; it is also an urban planning limitation.

The burden of this urban heat island phenomenon is falling disproportionately on those least responsible for it.

For many of us, heat is an inconvenience solved with air-conditioned offices and homes. We step indoors, switch on the air conditioner, postpone errands or escape to cooler places. But for informal workers, whether in homes under tin roofs, on the street or at construction sites, heat is a threat to health, income and survival. When temperatures rise, their livelihoods fall. According to *The Lancet*, India lost 247 billion potential labour hours in 2024, with agriculture (66%) and construction (20%) bearing a disproportionate brunt. Households already on the edge of economic crisis absorb the greatest loss. Heatstroke cases have risen sharply in recent years, but the quieter crisis is the erosion of everyday earning and difficult living conditions. The conversation on heat stress must evolve from emergency response to long-term urban resilience.

Heat is an interconnected systems challenge linked to water, housing, waste, green cover, livelihood and governance. The question is not simply how to help people survive hotter days, but how to build cities that are cooler, healthier and more equitable. Cool roofs matter. So do shaded public spaces. But a cool roof without water security, or tree planting without groundwater recharge, cannot solve heat stress in isolation. Heat is deeply tied to disappearing water bodies, shrinking green cover, poor housing design, burning waste and degraded public infrastructure. Integrated thinking must guide robust heat action plans as well as the way cities are planned and governed.

To do this, we must move beyond piecemeal interventions and develop holistic solutions. Increasingly, collaborative efforts supported by the Tata Trusts are bringing together technical expertise, community knowledge and local participation to address heat in a more integrated way—linking housing, water systems, public spaces, green cover and waste management.

In Patan, Gujarat, one of the hotter and more climate-vulnerable districts experiencing both environmental and socioeconomic vulnerability, work is underway with grassroots organizations such as Mahila Housing Trust to combine household-level and community resilience. This includes cool roofs, mist-cooled public spaces, green spaces and rainwater recharge structures in vulnerable neighbourhoods to improve water access. This is not only about restoring water access; it is also about improving the local microclimate, reducing heat vulnerability, strengthening women's leadership in climate adaptation, and rebuilding shared resource stewardship.

Similarly, in Mira Bhayandar in Mumbai and Chandrapur district in Maharashtra, interventions with Aga Khan Agency for Habitat integrate thermal mapping and hydrogeological studies with cool roof solutions, enhanced green cover, water body rejuvenation and groundwater recharge. Local communities are also participating in identifying heat-vulnerable zones and shaping locally relevant responses. Resilience is not only about large-scale policy and infrastructural changes, but also locally adaptive solutions. And no single intervention is enough. This is why building collaborations across civil society organizations is important, bringing together diverse expertise, deep contextual knowledge and the capacity to meaningfully mobilize communities.

The opportunity lies in convergence. A settlement should not have to choose between a cool roof and a functioning water body; it should have both. A city should not retrofit heat resilience after poor planning; it should design for resilience from the start with appropriate building materials, green spaces and built environment designs. This also means communities themselves must move from being beneficiaries to decision-makers.

Traditional Indian architecture understood this better than many modern cities do. Lime plaster, thick walls, internal courtyards, natural ventilation and shaded streets were part of a cohesive design philosophy. They worked with local climate conditions, regulated temperature naturally and embedded comfort in the very structure of everyday life.

If our cities are being built in ways that produce heat, they also have the potential to reduce it. The future of urban resilience will depend on how we design resilience into everyday life.

MINT CURATOR

Election fraud needn't happen for US voters to worry about it

The Trump administration is sowing doubt about midterm results



MARY ELLEN KLAS
is a politics and policy columnist for Bloomberg Opinion.



State election officials have locked arms to resist interference. ISTOCKPHOTO

You've likely heard the ominous what-if scenarios about US [midterm] election disruptions in November: immigration agents or federal troops roaming polling places, federal officials seizing ballots and voting machines, and President Donald Trump issuing an executive order postponing or cancelling the election. Courts and legal experts have given solid reasons that each one of those potential election disruptions is unlikely. But the threats have served their purpose: People are harbouring doubts.

The federal government doesn't have to interfere with the mechanics of the voting process to disrupt the election. The easiest way for bad actors to interfere right now is to let fear and distrust mess with our minds. By intimidating people into thinking they'll face harassment at the polls or casting doubt on the integrity of the process, the administration is planting the seeds that the results can't be trusted.

I recently spoke with a naturalized US citizen from Venezuela who lives in Miami. She's a reliable voter, but she told me she won't be voting in person this year. The Immigration and customs enforcement (ICE) raids that have terrorized her community have left her and her neighbours isolated and afraid.

This is where Trump has brought us: US citizens fear risking their safety to exercise their constitutional right to vote.

For the last 21 months, the federal government has mounted an unprecedented attack on state sovereignty over elections. Trump signed two executive orders that seek to radically dictate state election policy. The department of justice sued 30 states and the District of Columbia to gain access to sensitive voter data. The White House seized Georgia's ballots from the 2020 election. And Trump tried to rehash his election conspiracy theories in a prime-time speech earlier this year.

Judges from county courthouses to the US Supreme Court have rebuffed much of it. But the effort has undercut voter confidence. A University of Georgia survey of more than 11,000 voters found only 58% of Republicans, 63% of Democrats, and 49% of Independents trusted that votes would be counted accurately nationwide. And a recent poll from AP-NORC Center for Public Affairs Research found that only 34% of US adults trust government certifications of election results "a great deal" or "quite a bit," down from 40% in 2024.

Sometimes all it takes is a headline to sow doubt. That's what happened in 2016 when Russian hackers got access to the Illinois state voter registration database. The hackers went unnoticed for weeks and only when they started accessing thousands of records per second did Illinois election officials shut the system down.

"Russia wanted to be noticed," said David Becker, who runs the non-partisan election watchdog site The Center for Election Innovation and Research. "They wanted the American people to think that our foreign adversaries had... the ability to change our elections." Since then, US adversaries, particularly Russia, Iran and China, have focused on manipulating social media to make voters, particularly supporters of losing candidates, believe that their elections were stolen.

Fortunately, millions of voters haven't been intimidated by these global or domestic scare tactics. Records indicate that two weeks into early voting, an unprecedented number of votes have already been cast.

And in unprecedented fashion, state elections officials have locked arms in a bipartisan effort to resist any attempt by the administration to interfere.

State officials are taking a traditional "all hazards approach," said Minnesota secretary of state Steve Simon. They're prepared to handle election disruptions involving everything from natural disasters and bomb threats to power outages. This year, he told me, they've added "federal interference."

States have amassed teams of lawyers who are prepared to act quickly in the unlikely event that federal troops do show up, said Becker. They are also prepared to get before a judge if federal officials attempt to seize election equipment and get a ruling "before the chain of custody is irrevocably damaged," he explained.

But as a reminder, it's a crime for anyone to order federal troops to a polling place—a violation punishable by up to five years in prison, a fine and disqualification from public office. Federal laws bar ICE agents from the polls. And it's logistically impossible for Trump to cancel an election because thousands of officials across the country control elections, not the White House.

The internet is an inviting host for allowing the mischief to continue in the weeks ahead. Let's keep our wits about us. Thank the hard-working elections officials who keep the system sound, and don't be duped. ©BLOOMBERG

GUEST VIEW

Diagnostic firms are using an old marketing playbook

CHANDRAKANT LAHARIYA



is a physician and author of 'Pill-Free: You Don't Need Everything You Have Been Prescribed'

Most of us would have found a newspaper flyer offering a discounted 'full-body' check-up: 100 or more tests at a price too good to ignore. Many of us would have had such a package done at some point in the last few years. The detailed report that follows these "comprehensive tests" often comes with a few values highlighted. What you may not know is that many of these flagged values have little clinical significance. Yet, they can trigger repeat tests, scans, diagnostic labels, medicines and follow-up visits. The body may have changed little; the medical identity may have changed completely.

India is in the middle of a diagnostic boom. Laboratory chains, imaging centres, hospital packages and digital aggregators have made testing cheaper and more convenient. India certainly needs greater diagnostic capacity. But an important distinction is being blurred: expanding access to testing is not the same as expanding testing itself.

The history of India's ultra-processed food market offers a useful parallel. Four decades ago, large food companies did not merely create capacity; they created new consumption habits and new markets. Advertising, discounts and convenience converted occasional eating into routine consumption. The same grammar is now visible in diagnostics: "100 tests for ₹999," annual health packages, app notifications and home collections marketed to people who feel perfectly well.

When laboratory and diagnostic capacity expands rapidly in crowded urban markets, companies must keep machines and collection networks busy. Generating demand becomes commercially rational. Yet, diagnostics differ fundamentally from ordinary consumer goods. Every additional test creates another opportunity to discover an "abnormality," generating not only revenue but also anxiety and treatment.

Reference ranges are statistical constructs, not biological borders separating health from disease. Test enough parameters in a healthy person and some will inevitably fall outside. Add biological variation, imperfect specificity and differences between laboratories, and red flags become even more likely. This can then lead to more tests, specialist visits and medication.

If this continues for long enough, India could reach an absurd destination: almost every adult would carry a risk label, precondition, incidental finding or abnormal marker. The category of healthy people would shrink, even without any comparable deterioration in population health.

The policy challenge, therefore, is not whether the diagnostic sector should grow, but where and how it should grow.

India has a distribution problem as much as a capacity problem. Metropolitan markets are crowded with laboratories while many Tier-2 and Tier-3 towns still lack dependable pathology services, CT scan, MRI, histopathology and specialist diagnostics. Tax incentives, concessional credit, viability-gap support and public-private partnerships should favour facilities in underserved districts.

Quality should also become a stronger market signal. The National Accreditation Board for Testing and Calibration Laboratories' accreditation and standards related to quality, calibration, sample transport and reporting should be visible to consumers. A digital platform selling a test should identify the laboratory processing the sample and disclose its accreditation status.

Medical tests are attractively packaged even if not needed to change habits just like with eating fast food

Diagnostic aggregators require particular scrutiny because their greatest strength can also become their weakness. They lower prices, simplify booking and expand access to home collection. But a platform whose revenue rises with the number of tests sold has a structural incentive to maximize volume. Regulations should distinguish evidence-based screening from promotional packages, require disclosure of commissions and prevent mildly abnormal results from becoming automatic opportunities to upsell tests.

Advertising rules also need to catch up. "Preventive" should not become a marketing synonym for "more." Claims that larger packages provide better health protection should require evidence. High-volume packages aimed at asymptomatic consumers should explain that testing can generate false positives and unnecessary follow-up.

Doctors, hospitals, insurers and employers are part of the same ecosystem. Testing protocols should begin with a clinical question: what are we looking for, and would the result change treatment? Hospitals can audit routinely overused investigations, while employer-sponsored health checks should be judged by scientific evidence rather than by the sheer number of tests offered.

The economics of diagnostics need not be suppressed; it needs to be redirected. India needs a larger diagnostic sector, particularly in places where testing is scarce. Growth should come from widening geographic access, improving quality, shortening turnaround times and diagnosing important diseases early—not from persuading well-served urban Indians to test more often.

The lesson from ultra-processed food is not that commercial growth is inherently harmful. It is that markets can reshape behaviour long before public policy notices the consequences. A snack can change what people eat. A diagnostic test can change how people understand themselves. India needs more diagnostics where they are scarce, and greater restraint where testing is abundant but clinical purpose is not.

Economy

WEDNESDAY, OCTOBER 28, 2026

IN THE NEWS

INDIA MUST EMBRACE TECH OF FUTURE: PM



INDIA IS MOVING forward with a new mindset and newfound self-confidence in the field of science and technology, Prime Minister Narendra Modi said on Tuesday at the Emerging Science, Technology and Innovation Conclave (ESTIC)-2026. He also said the country's goal is to create new technology and shape its direction - for India, for the world, for today, and for tomorrow. "India must embrace technology of the future, innovate boldly, and lead the world in creating them," Modi said. The prime minister highlighted that the country needs to attain self-reliance and build strength in critical technology.

SAIL Q2 net profit jumps fourfold to ₹1,750 crore

STATE-OWNED STEEL AUTHORITY of India (SAIL) on Tuesday posted a four-fold rise in consolidated net profit to ₹1,750.47 crore in the September quarter on the back of higher revenues. The PSU reported a net profit of ₹418.72 crore in the year-ago quarter, the company said in an exchange filing. Revenue from operations rose to ₹31,997.55 crore in Q2 FY27 from ₹26,704.17 crore in the year-ago quarter.

DPIIT launches 6th National Startup Awards

THE DEPARTMENT FOR Promotion of Industry and Internal Trade (DPIIT) on Tuesday launched the sixth edition of the National Startup Awards (NSA 6.0), introducing 12 new sectoral categories and a dedicated award for student innovators to widen recognition of entrepreneurship across the country.

Speaker Birla holds bilateral talks with Vietnam, Thailand

LOK SABHA SPEAKER Om Birla on Tuesday held bilateral meetings with Vietnamese MP Mai Dung Thai Quynh and Thailand Senate President Mongkol Surasajja to strengthen parliamentary cooperation and expand bilateral ties.

FE BUREAU & AGENCIES

GOVT WEIGHS LIGHTER DISCLOSURE NORMS

Funds with limited China link may get easier access

MUKESH JAGOTA
New Delhi, October 27

BORDER RELAXATION

- Hunt for senior country officer is being handled by search firm Heidrick & Struggles
- Press Note 2 of 2026 permits automatic-route investments with beneficial ownership up to 10%
- India received **₹4,895.65 crore** in investments under relaxed provisions through August 29



- Seven neighbouring countries, including China and Pakistan, remain covered under land-border restrictions
- Investments span AI, IT, data centres, pharmaceuticals, manufacturing and transport services

THE GOVERNMENT IS considering easing paperwork requirements for investment funds with less than 10% ownership by investors from countries sharing a land border with India (LBCs), a senior official said on Tuesday.

The proposed changes would involve modifying forms to remove disclosure requirements for information that is not necessary, the official said.

In March, the government amended Press Note 3 of 2020 through Press Note 2 of 2026, allowing investments from entities and funds with beneficial ownership of 10% or less by investors from LBCs to come through the automatic route, provided there is no management control or ultimate effective control by such investors.

The countries covered by the restrictions are China, Pakistan, Bangladesh, Myanmar, Nepal, Bhutan and Afghanistan.

Between March and August 29, investment proposals worth ₹4,895.65 crore came into India under the relaxed provisions. The investments span high-growth sectors such as artificial intelligence, information technology, data centres, pharmaceuticals, manufacturing and transport services. They originated from investment hubs, including the US, Singapore, Mauritius, South Korea, Japan, Luxembourg and the Cayman Islands.

Press Note 2 of 2026 also introduced a 60-day approval timeline for investments from LBCs in specified manufacturing segments, including capital goods, electronic capital goods, electronic components, polysilicon and ingot wafers, advanced battery components, rare earth permanent magnets and rare earth processing.

For investments under this provision, majority shareholding and control of the investee company must remain with resident Indian citizens or Indian entities owned and controlled by resident Indian citizens at all times.

Push to manufacture import-dependent goods

Separately, the government has completed an exercise to identify 100 intermediate goods for which India is heavily dependent on imports, with a view to encouraging domestic manufacturing, the official said. The exercise was completed after consultations among various ministries, and the government will now decide on the support needed to make domestic production of these goods viable.

₹270 crore allocated under Startup FoF 2.0

On the ₹10,000-crore Startup Funds of Funds 2.0, launched in April, the official said around ₹270 crore of the ₹900-crore allocation in the current financial year had already been allocated to the Small Industries Development Bank of India (SIDBI), which is implementing the scheme.

SIDBI has shortlisted 15 alternative investment funds (AIFs) for support. The government will part-fund these funds, which will invest in startups operating in capital-intensive and high-risk sectors that require longer gestation periods and patient capital.

India and Mexico finalise terms of trade agreement

- Goyal hints at early harvest

FE BUREAU
New Delhi, October 27



Commerce Secretary Rajesh Agrawal (right) with Director General for Asia-Pacific at Mexicos Secretaría de Relaciones Exteriores, Fernando González Saiffe, in Mexico PTI

INDIA AND MEXICO will formally launch negotiations for a preferential trade agreement (PTA) with the signing of the Terms of Reference (ToR) during Commerce Secretary Rajesh Agrawal's two-day visit to Mexico City which began on October 26.

Commerce and Industry Minister Piyush Goyal said Mexico is keen on an early-harvest arrangement to liberalise trade in selected goods faster.

"Mexico is very keen to have an early harvest," Goyal said in The Hague. Early harvest is an interim agreement that could allow the two countries to reduce or eliminate duties on goods where neither side has major sensitivities faster, without waiting for a comprehensive deal.

The proposed PTA will focus on liberalising trade in identified goods between the two countries. The ToR will provide the framework for negotiations, which are expected to identify products on which tariff concessions can be offered.

Goyal also updated on India's broader trade negotiations, saying a deal with Chile was "quite ripe for conclusion" and talks with Canada were making "very good progress". The sixth round of talks with Canada on Comprehensive Economic Partnership Agreement (CEPA) is expected in early November with both sides aiming to conclude negotiations by the end of this year.

Business engagements

Agrawal arrived in Mexico City on October 26 for meetings with the Mexican government and business community to advance bilateral trade and investment ties.

Ahead of the ToR signing, the Indian Embassy in Mexico, in partnership with the Indmex Council, brought together Indian and Mexican business leaders to explore opportunities, address challenges and strengthen commercial linkages.

Agrawal highlighted the complementarities between the two economies, India's growth of around 7% and the untapped potential for trade, investment and business partnerships. He also emphasised the importance of policy stability, predictability and a rules-based trading environment.

Financial sector must expand coverage: Das

FE BUREAU
New Delhi, October 27

THE FINANCIAL SECTOR must expand credit access, deepen corporate and municipal bond markets, and extend insurance and pension coverage to support the country's Viksit Bharat 2047 ambition, said Shaktikanta Das, Principal Secretary-2 to the Prime Minister, on Tuesday.

Das said India remains among the world's fastest-growing major economies despite geopolitical tensions and global trade disruptions, with growth projected at 7% in FY27.

Speaking at a *Business Standard* event in Mumbai, Das said the country's financial system had emerged stronger from successive global crises, backed by healthier bank balance sheets, improved asset quality and robust credit growth. He said the banking sector had moved beyond the stress of high non-performing assets and weak capital adequacy that had weighed on it in the past.



"The Indian banking sector has shaken off the hangover of high NPAs and low capital adequacy, and has evolved into a well capitalised system with healthy balance sheets, high profitability and surge in credit growth," Das said.

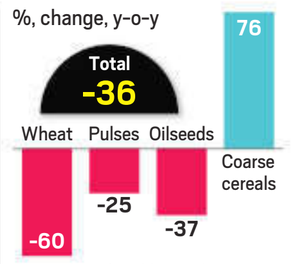
He highlighted the importance of strengthening the financial sector as India seeks to transition from a lower-middle-income economy to a high-income nation by 2047. Banks and financial institutions, he said, would need to play a larger role in financing infrastructure, advanced manufacturing, renewable energy and emerging technologies, while widening access to credit for small businesses and farmers.

Das also called for a deeper corporate bond market and stronger municipal bond financing to help meet the country's growing investment needs. Greater participation by retail and institutional investors in public bond issues, he said, could diversify funding sources beyond bank lending and provide households with extra investment opportunities.

RABI SOWING BEGINS AT A SLOW PACE



SOWING OF RABI or winter crops — wheat, pulses, oilseeds and coarse cereals – has commenced sluggishly. The area covered until October 23, 2026, was 1.8 million hectares (Mha), a 36% year-on-year decline. The total winter crop sown area is 64.76 Mha, according to the agriculture ministry. Sowing would pick up pace by the middle of next month as day temperatures are likely to cool down with improvement in the soil moisture levels. Harvesting of Kharif crops should be completed in the next two to three weeks, officials said. The ministry stated that sowing of wheat has just commenced in a few states. Wheat, a major rabi crop, is usually sown by farmers in October 15 - November 30 and harvested at the end of March and April. Wheat was sown in 33.6 Mha in the 2025-26 crop year (July-June).



Source: Agriculture Ministry, *area covered till October 23, 2026 is 1.8 Mha (including rice), against normal sown area of 64.76 Mha

—Sandip Das

JLR gets over half of quota under trade pact with UK

FE BUREAU
New Delhi, October 27

JAGUAR LAND ROVER (JLR) India has been allocated a quota to import 325 cars at concessional duties under the India-UK Comprehensive Economic and Trade Agreement (CETA), accounting for more than half of the 642 units approved by the government in the first round of allocations.

The government has approved six applications out of eight received against a quota of 4,200 cars made available for imports at preferential duties in 2026, the first year of the trade pact's implementation. The agreement came into force on July 15, leaving less than six months in the calendar year.

BMW India and Skoda Auto Volkswagen India have been allocated quotas of 75 cars each. Among dealerships, Select Cars has secured approval for 77 units, K U N Motor Company for 60 and Infinity Cars for 30.

Under CETA, India has committed to allowing imports of 20,000 cars in the first year at preferential duties. However, given the pact's mid-year implementation, the government has limited the quota available for the remainder of 2026 to 4,200 units.

India-EU investment protection deal under discussion: Goyal

RAJESH RAI
Hague, October 27

NEGOTIATIONS FOR AN Investment Protection Agreement (IPA) between India and the European Union are underway, Commerce and Industry Minister Piyush Goyal has said.

He also said some legal changes are required for an agreement on Geographical Indications (GIs) with the EU, which the ministry is going to introduce in Parliament.

"Discussions are underway on a bilateral investment agreement or the IPA, and for the GI pact, we need to make some legal changes," he told reporters here.

India and the 27-nation European Union announced the conclusion of negotiations for a free trade agreement on January 27, which is touted as "mother of all deals".

The EU is already a leading investor in India. About 6,000 European firms are present in India.

A GI is primarily an agricultural, natural or manufactured product (handicrafts and industrial goods) originating from a definite geographical territory.

An IPA provides a framework to protect investments made by companies and investors in another country.

IN PROGRESS



- The EU is already a leading investor in India. About 6,000 European firms are present in India
- With preferential access to economies accounting for 76% of global GDP, India's trade opportunities would increase significantly

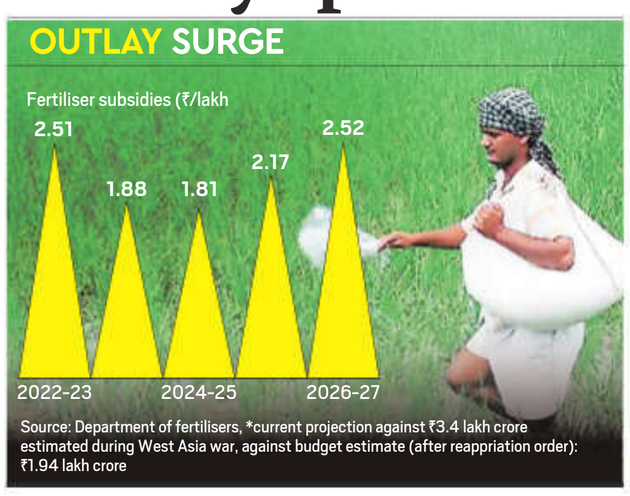
It aims to ensure fair and non-discriminatory treatment, protect investors against unlawful expropriation and provide mechanisms for resolving investment-related disputes.

Such agreements help boost investor confidence, reduce policy-related risks and encourage cross-border investment by offering greater certainty and transparency in the host country's regulatory framework. It would safeguard products such as Darjeeling tea, Basmati rice and Indian handicrafts, while protecting European products such as Feta cheese. **—PTI**

Four-fifths of budgeted fertiliser subsidy spent

- Annual outgo likely to exceed ₹2.5 lakh crore

SANDIP DAS
New Delhi, October 27



Source: Department of fertilisers, *current projection against ₹3.4 lakh crore estimated during West Asia war, against budget estimate (after reappriation order): ₹1.94 lakh crore

ELEVATED GLOBAL PRICES of finished products and LNG, the major feedstock for domestic urea production, resulted in the government spending over ₹1.32 lakh crore on fertiliser subsidies so far this fiscal year.

That's 77% of the budgeted fertiliser subsidy of ₹1.71 lakh crore for the year.

The fertiliser ministry's estimate of the subsidy requirement of the year after re-appropriation order currently stands at ₹1.94 lakh crore.

This estimate is likely to be revised further upwards.

Sources said that while urea prices fell from their peak in May, the overall subsidy outlay for soil nutrients is likely to exceed the previous record of ₹2.52 lakh crore in FY23.

According to sources, of the expenditure incurred, ₹92,251 crore has gone toward imports and domestic production of urea, the country's most consumed soil nutrient so far this fiscal year.

Oil purchases driven by price, not pressure: Puri

SAURAV ANAND
New Delhi, October 27



PETROLEUM MINISTER HARDEEP Singh Puri on Tuesday said he had never felt any pressure from the United States over India's oil procurement decisions, asserting that refiners would continue buying crude from suppliers offering the most competitive prices.

His remarks come as Indian refiners reassess Russian oil purchases amid rising freight costs, narrowing discounts and increasingly competitive Middle Eastern supplies.

"I never felt anything," Puri said when asked whether Washington had pressured New Delhi to reduce Russian crude imports, during a media interaction at the 29th Energy Technology and Innovation Meet in Goa.

"This is a government committed to the welfare of its people and energy supplies," he told reporters.

The minister said crude purchases would depend on the prices and terms offered by suppliers, with India's energy security remaining the priority.

"At the point of negotiation, whoever is supplying a particular grade, we will buy from them. Prices come down sometimes," he said.

Puri noted that Russian crude accounted for just 0.2% of India's oil imports before the Ukraine war, with purchases rising sharply thereafter as discounted supplies became available. He also pointed to increasing oil supplies from West Asia.

The changing market conditions are reflected in refiners' purchases. Bharat Petroleum Corporation (BPCL), which sourced 37% of its crude from Russia during July-September, expects Russian purchases to decline significantly in November as Middle Eastern grades become commercially more attractive.

Russian crude premiums have narrowed sharply to $1-2 per barrel for December cargoes from $12-13 in October. However, elevated freight costs continue to affect the competitiveness of Russian supplies.

For November, freight on Russian crude shipments from Baltic and Black Sea ports to India's west coast ranges between $27 and $32 per barrel, depending on the vessel and route. In comparison, shipping crude from Oman and Fujairah costs $6-7 per barrel, while cargoes passing through the Strait of Hormuz cost around $16, excluding war-risk insurance.



Rage over E20 fuel was a 'paid campaign': Gadkari

UNION ROAD TRANSPORT Minister Nitin Gadkari on Tuesday said the rage over blending 20% ethanol in petrol fuel was a "paid campaign".

The remark came a day after the government notified changes to the Central Motor Vehicles Rules 1989, allowing flex-fuel vehicles that can run on up to E100 (nearly pure ethanol).

Addressing an event organised by industry body CII, Gadkari further said India can save precious foreign exchange by reducing imports of fossil fuels.

"Three months ago, huge noise (*khub halla*) was made against the E20 (20% ethanol-blended petrol) fuel; now rage against E20 fuel is over...It was a paid campaign," he said. **—PTI**

Opinion

WEDNESDAY, OCTOBER 28, 2026



CRUDE PURCHASE

Union Petroleum Minister Hardeep Singh Puri

At the point of negotiation, whoever is supplying a particular grade, we will buy from them. Prices come down sometimes

Jobs, the missing link

Quality employment and rising real wages vital to sustaining growth momentum

INDIA'S ECONOMIC MOMENTUM looks increasingly fragile as employment indicators weaken amid mounting external headwinds. As the government acknowledged last year, employment drives consumption and sustained growth. But jobs must pay adequately, with wages rising faster than inflation. The Periodic Labour Force Survey (PLFS) places overall unemployment near 5%, broadly unchanged over several quarters. The Centre for Monitoring Indian Economy (CMIE), which uses a different methodology, has generally reported rates 2-3 percentage points higher. More troubling than this divergence is the movement beneath CMIE's headline numbers. Its unemployment rate fell from 7.3% in January to 3.99% in September, even as the labour force, employment, and participation declined. This suggests discouraged workers may be withdrawing from the job market. The PLFS puts unemployment among 15-29-year-olds at 15-16%, substantially above the overall rate. Marginal gains in participation and worker-population ratios provide little reassurance. October's flash Purchasing Managers' Index (PMI) showed hiring slowing to its weakest pace of 2026, with services employment stagnating after nine months of expansion. Firms apparently saw little need to add staff, suggesting business resilience is not translating into jobs across sectors and regions.

Official employment statistics also conceal considerable distress employment: subsistence self-employment, casual work, and disguised agricultural labour. Millions may be finding work, but the aspirations of the 7-8 million people entering the labour market annually remain largely unmet. Some simply stop searching, distorting the headline unemployment rate. Greater capital intensity, stagnant real wages, and reverse migration to villages underscore concerns about jobless growth. Urban labour markets face particularly acute structural pressures. The informal sector still accounts for over 85% of employment, generally without meaningful social protection. Better-paid opportunities are concentrated in information technology and finance, while much of the growth elsewhere in services involves delivery, retail assistance, and local transport. Services employ roughly 190 million people, compared with just 27 million in organised manufacturing.

Contract employment offers industry necessary flexibility, but contract workers now make up 42% of organised manufacturing employment. The rapidly expanding gig workforce, projected to grow from 10 million in 2024-25 to 23.5 million by 2029-30, offers earning opportunities without necessarily providing stable, skilled careers. Meanwhile, the mismatch between workers' capabilities and employers' requirements is widening. Artificial intelligence (AI), digital technologies, and green industries are transforming demand for skills, yet training has not kept pace. The government has introduced the PM Internship Scheme, Employment Linked Incentive Scheme, National Apprenticeship Promotion Scheme, and upgrades to industrial training institutes. Results, however, have been modest, reflecting resource constraints, design weaknesses, and limited industry participation. Coordination between employers and training providers is essential for results. These programmes need stronger employer partnerships, measurable placement outcomes, and sustained follow-through.

The coming Union Budget should prioritise the creation of millions of adequately paid jobs while preserving incentives for investment and entrepreneurship. An economy with India's low per capita income cannot depend on a narrow pool of high-paying positions in AI, product design, and finance. It needs technology-enabled blue-collar work alongside productive employment in traditional manufacturing and services. Policy must encourage labour-intensive investment, improve vocational training, and help smaller enterprises expand without excessive compliance burdens. Finance Minister Nirmala Sitharaman's observation that the next phase of consumption growth depends heavily on wage growth is timely. Stronger real wages would support household spending, reinforce business confidence, and make expansion more durable. Without broad-based gains in job quality and earnings, headline growth risks losing its momentum.

Hollywood female execs easy targets in a crisis

MONDAY OFFICIALLY MARKED the end of Bela Bajaria's 10-year run at Netflix, where the content boss spearheaded some of the streaming giant's biggest hits. Her ouster came just ahead of Netflix reporting its slowest sales increase in three years and forecasting a fourth consecutive quarter of slowing growth. Users aren't watching the streaming platform as much as they once did.

These issues are clearly linked to Bajaria's purview. But the nearly 42% slide in the share price over the last 12 months likely has more to do with Netflix's failed bid for Warner Bros. Discovery's studio and streaming divisions than it does with anything else. Wall Street read Netflix's advances as a red flag for a company whose leaders long crowed that they were "builders, not buyers".

The acquisition strategy that's led to a depressed share price is not a Bajaria problem; it's the problem of co-CEOs Ted Sarandos and Greg Peters. But someone had to pay the price, and the two guys at the top wouldn't pick themselves to take the fall.

Bajaria's departure, however, matters far beyond Netflix. She's just the latest among the small handful of women who have made it to the very top in Hollywood, only to be unceremoniously swept out in the entertainment world's great reshuffling.



BETH KOWITT

Bloomberg

The industry is consolidating as companies look for scale to survive the cutthroat streaming wars. YouTube and TikTok are now a competitive threat for share of eyeballs. Tech behemoths, which have different agendas than traditional studios and deeper pockets, are also becoming entertainment giants. Who survives and ends up in charge has implications outside corporate org charts.

Performance, of course, is part of the story. Jennifer Salke, former Amazon's head of film and television who exited last March, had some expensive flops and fumbled the stewardship of the James Bond franchise. But performance alone doesn't explain who is losing their jobs. Salke was also locked in a power struggle with a (male) executive, who had been brought in above her. Last month, streaming chief Cindy Holland was out at Skydance, a victim of consolidation in which a (male) executive won out to run the company's streaming business as it combined with Warner Bros. Discovery. Pamela Abdy, who co-ran Warner Bros. film division, also didn't survive the Skydance merger. (In this case, her male co-head also got the axe.)

This problem isn't unique to Hollywood. Research has found that when companies are in cutting mode, women and people of colour are more likely than their male counterparts to take the hit. A business and political climate that's become openly hostile to women has further given companies permission to treat female executives as expendable. Even what seems like good news for female executives has come with an asterisk. Channing Dungey, head of Warner Bros. television group, has a place in the combined company with Skydance but reportedly will no longer report to the CEO. And Walt Disney's Dana Walden got promoted to president and chief creative officer, but only after losing out on the CEO job.

Up and down the reporting structures in Hollywood, the numbers are already grim. Women held only nine, or 8.1%, of the 111 director roles attached to the top 100 US box office films last year, down from 13.4% in 2024, according to a study by the Annenberg Inclusion Initiative at the University of Southern California. That trickles down to the kinds of content that gets made; the percentage of top-grossing films with female protagonists dropped from 42% in 2024 to 29% in 2025.

LISTING CHOICE

BETWEEN COMPANY PREFERENCES LIES THE STORY OF HOW INDIA RAISES CAPITAL AND HOW FAR IT CAN GO

Light for some, heavy for others



CKG NAIR
V SHUNMUGAM

Respectively Former Director, National Institute of Securities Markets, and Partner, MCQube

THE POTENTIAL LISTING of Tata Sons has filled many columns this season. The RBI has asked the group's holding company to list under its rules for large non-banking financial companies. Its principal shareholders, Tata Trusts, would prefer it to remain private. Many experts have weighed in on the debate, but it is worth taking a broader view: Tata Sons is just one corner of a much larger picture.

Listing is the exception everywhere. India has more than 21 lakh active companies, but fewer than 6,000 are listed. The US, the world's largest market, has about 4,350 listed firms, down from 8,090 in 1996. Indian entrepreneurs are also opting for lighter legal structures. New limited liability partnership registrations rose 40% to 86,476 in 2025-26, while one-person firms continue to grow steadily.

Those who list find a deep pool. In 2025, 373 IPOs raised a record ₹1.95 lakh crore: 103 on the main board and 270 on small and medium enterprise (SME) platforms. So far in 2026, 84 main-board issues have raised about ₹1.10 lakh crore, with another ₹3.86 lakh crore in the pipeline. In the US, 117 IPOs have raised $148 billion this year.

The longer-term trend tells the same story. In 2000, listed companies in India were worth about 48% of GDP. The ratio reached nearly 150% in December 2007, fell to about 55% by March 2009, and has climbed steadily since. It now stands at around 136%. The SME platform has grown even faster, rising from 0.04% of GDP in 2019-20 to about 0.7% today. Each increase reflects household savings flowing into businesses. Markets allow a family in a small town to own a stake in a factory, bank, or software firm. They also enable a young company to raise growth capital without relying on a single large patron. In this way, markets make it easier to raise capital and foster innovation and growth.

Why, then, do some stay away while others rush in? Because listing feels light to some and heavy to others. The four quadrants capture the range.

Private by choice: Some profitable firms simply don't need public money. Zoho, the software maker, has never raised outside capital. It earned a net profit of about ₹3,191 crore in 2024-25 and shows no sign of seeking a listing. Germany's Bosch group is private too: its charitable foundation owns 94% of the capital, while a separate trust company holds 93% of the votes. For such firms, privacy brings freedom, and the reward is a long-term focus.

Private at the top, listed below: Some groups keep the parent private while drawing public money through listed arms. Tata Sons is the leading example: it sits atop 26 listed companies. Seven of those companies, in turn, own about 12% of Tata Sons, while the Trusts own about 66%. The Bosch group follows a similar pattern in India: its private German parent holds about 70% of listed Bosch Limited. The public funds the subsidiaries, while the parent keeps its own counsel. A listing at the top would give every shareholder down the chain a clear price. India's rules now make that route gentler. Since March 2026, the largest companies can list with a small initial float and build public holdings to 25% over about a decade.

List when ready: Others wait until they achieve scale and profitability. The National Stock Exchange listed last month, following years of steady earnings. Its ₹22,562-crore issue was subscribed 5.71 times. Tata Capital listed in October 2025 with a ₹15,512-crore issue, under the RBI rule that now applies to its parent. Hyundai Motor India raised ₹27,870 crore in 2024. Jio Platforms hits the market with its ₹33,000-crore issue on October 21, at a reported valuation above ₹12 lakh crore. Investors here buy companies with known earnings, and valuations remain measured. A sign of a maturing market.

List to grow: The fourth group lists early, often before turning a profit. Swiggy listed in November 2024, a year after reporting a net loss of ₹2,350 crore. In recent years, the average SME issue has raised about ₹24 crore, often for early-stage firms. Abroad, SpaceX listed in June at about $1.77 trillion after recording a $4.94 billion loss in 2025. Anthropic's prospectus devotes about 80 of its 261 pages to risk factors, including "catastrophic or existential risks to humanity". Investors still show keen interest. Here, the market funds tomorrow's possibilities.

Public sector enterprises (PSEs) have travelled the farthest across these quadrants. For decades, they kept away from the market. Over the last two decades, they have become eager to list, from Coal India (2010) to LIC (2022). Many, though, list on terms of their own. Several have been pulled by the exchanges over board composition. LIC has until 2032 to reach 25% public shareholding. The proposed Securities Markets Code goes further, allowing the Central government to exempt any listed public sector company from key issuer requirements. A narrower, time-bound window would let PSEs carry the weight of listing as fully as their private peers.

So the weight of listing varies by quadrant. For an early lister, it is light: capital flows in, and disclosure is a fair price to pay. For an asset-rich company, listing can feel heavy. Quarterly results, broader scrutiny, and a daily market price all come with it. Yet that weight brings rewards of its own. Listing gives every shareholder a price, a voice, and a way to exit.

Three ideas can help bring more of India's wealth into the light. First, making listing easier for asset-rich firms. The March float norms point the way. A route that allows charitable trusts to retain control while listing, as foundations in Denmark and Sweden do via voting structures, could take this further. Second, let's keep the bridges between quadrants open. SME platforms already help growing firms move to the main board. Third, rules shall apply a consistent yardstick: promise and profit both deserve fair weight in valuation.

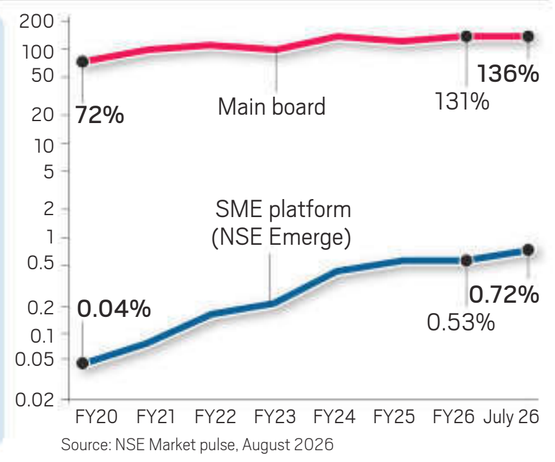
Over a generation, India's market has grown from about half of GDP to well above it. Bringing more large private enterprises to market is the logical next step. When the heavyweights choose to list, the market becomes broader and deeper for all.

BIGGER POOL

Listing has deepened at both ends of the market

Market capitalisation as a share of GDP: main board nearly doubled since FY20; the small and medium enterprise (SME) platform about 16 times, from a small base

Market capitalisation, % of GDP (long scale)



Source: NSE Market pulse, August 2026

Polymer promises ecosystem prospects



RAMEESH KAILASAM

Founder, Rameesh Kailasam Advisory

India's policy shouldn't be framed around procuring notes from global suppliers, but focus on spotting partners willing to co-develop local infra & transfer foundational technology

THE DEBATE SURROUNDING India's currency technology infrastructure has shifted from whether synthetic substrates are technically viable to whether they make strategic and economic sense for a country defined by high cash velocity and intense physical note handling. With the government approving field trials for one billion 10-rupee and 20-rupee polymer banknotes through the RBI, the conversation has reached a critical juncture. The core inquiry is no longer merely about testing the longevity of plastic notes in tropical conditions. Rather, it is about whether India possesses the industrial depth to build and sustain a fully domestic polymer currency ecosystem at scale.

To appreciate the imperative behind this transition, one must recognise that polymer notes are no longer an experimental luxury. Since Australia pioneered the technology in 1988, over 60 nations have integrated polymer into their currency systems either partially or fully. Engineered primarily from biaxially oriented polypropylene (BOPP), polymer substrates present structural and operational benefits that traditional cotton-pulp paper cannot match. Their non-porous composition renders them resilient against tearing, moisture, soil, and the abrasive wear typical of small-denomination notes in heavy circulation. Furthermore, because these notes last significantly longer, the overall life cycle costs and carbon footprint associated with frequent reprinting and distribution drop considerably. At the end of their operational life, polymer notes can be recycled into commercial plastic goods, creating a circular model that aligns with broader environmental sustainability goals.

Beyond durability and ecology, transitioning to polymer introduces a fundamentally superior security architecture. Traditional paper relies predominantly on surface-level security features added during the printing process. Polymer, by virtue of its transparent substrate, allows advanced optical and machine-readable security mechanisms to be embedded directly into the base material. Features like intricate transparent windows, diffractive optical elements, and complex opacification layers make high-fidelity counterfeiting exponentially harder and far more capital-intensive for illicit operators. For a cash-intensive economy like India where low-denomination notes pass millions of hands daily, integrating these intrinsic security features offers a crucial line of defence.

> There is a scope to bring together complementary capabilities in advanced films and anti-counterfeiting technologies

However, the true challenge and opportunity lie in the manufacturing value chain. Moving beyond pilot projects begs the question whether India must rely permanently on foreign suppliers or if it can establish a self-reliant domestic ecosystem. A polymer banknote is far more complex than a standard sheet of printed plastic; it represents a sophisticated convergence of polymer chemistry, specialised resin formulations, precise opacification coatings, security inks, anti-counterfeiting technologies, precision gravure printing, and high-integrity converting processes. Every single layer must interact seamlessly with the next to ensure exact optical clarity, structural adhesion, and tactile consistency under extreme environmental conditions.

Fortunately, India does not need to construct this industrial matrix entirely from scratch. Its domestic chemical, materials, and flexible packaging industries already possess deep technical expertise in BOPP film production, advanced specialty coatings, and anti-counterfeiting technologies. Moreover, Indian manufacturers have long provided security-sensitive products, such as tax stamps, high-security documents, identity cards, and specialised authentication applications to both public and private institutions. This means domestic entities already operate under strict protocol environments, possess expertise in anti-counterfeiting technologies, and understand the rigorous quality assurances demanded by sovereign institutions.

There is also an opportunity to bring together complementary capabilities in advanced films and anti-counterfeiting technologies, creating a more integrated platform rather than treating the substrate and authentication layers as separate technologies. Such integration could help India develop greater control over the underlying technology stack, while also reducing dependence on fragmented external supply chains.

The emerging field of bidders reflects this mix of domestic capability and global expertise. Cosmo First-De La Rue, CCL Secure, Q&T Hi-Tech Polymer, and UFlex-Spectra Systems are the firms/consortia reported to have bid for the project.

The strategic synthesis of these existing capabilities is next. Instead of importing completed polymer substrates from overseas suppliers and assembling them locally through fragmented vendor networks, India has the capacity to foster domestic industrial consortia. By uniting local experts in polymer science, film manufacturing, specialty chemicals, and anti-counterfeiting technologies, it can construct an integrated, end-to-end platform for polymer banknote production. Where highly guarded proprietary or patented technologies are necessary, they can be incorporated through strategic licensing agreements or technology transfers without compromising the sovereignty of the broader manufacturing backbone.

International banknote specialists undoubtedly bring decades of valuable expertise from mature markets, and their technical insights will remain useful during initial stages. But India's policy approach should not be framed around merely procuring notes from global suppliers who have dominated the market. Instead, the focus must be on identifying partners willing to co-develop local infrastructure and transfer foundational technology. By leveraging its vast domestic market, industrial scale, and chemical manufacturing strengths, India can transform a routine currency modernisation programme into a springboard for advanced materials manufacturing, ensuring long-term sovereign control over its monetary infrastructure.

LETTERS TO THE EDITOR

Fair taxation

Apropos of "India needs a tiered capital gains tax" (*FE*, October 27), tax policy should encourage patient investment without unfairly favouring wealth accumulated through financial assets. A tiered capital gains structure, with lower rates for longer holding periods, could reward investors who support businesses over time rather than chase quick market gains. Yet the rules must distinguish genuine long-term investment from transactions designed to obtain tax benefits. Frequent changes would unsettle markets and complicate compliance for ordinary savers. The government should publish clear holding-period thresholds, avoid retrospective changes, and review the system. A predictable, carefully designed tax regime can aid capital formation while treating investors fairly. Such stability also helps households plan savings confidently.
—SM Jeeva, Chennai

●Write to us at feletters@expressindia.com

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The Tribune
ESTABLISHED IN 1881

Source security

Ensure journalists can expose wrongdoing

A journalist's promise to protect a confidential source is not merely a professional courtesy; it is a cornerstone of investigative journalism. Without that assurance, whistleblowers may remain silent, evidence of wrongdoing may never surface and the public may be denied information vital to democracy. The challenge to India's Digital Personal Data Protection (DPDP) Act in the Supreme Court brings this fundamental concern into sharp focus. The Digital News Publishers Association has argued that provisions of the law could expose confidential sources and impede investigations. Its apprehension centres on the government's powers to seek information from organisations handling personal data, potentially compromising the identity of those who approach journalists in confidence. The court has sought the Centre's response, with the matter scheduled for further hearing on November 17.

Privacy protection is undoubtedly essential in an increasingly digital world. Citizens must be protected against the misuse of their personal information. However, a law intended to safeguard privacy must not inadvertently become an instrument for frustrating legitimate scrutiny. Investigations into corruption, abuse of authority and corporate wrongdoing often depend on insiders willing to speak at considerable personal risk. If their identities can be exposed without adequate safeguards, the chilling effect on journalism could be profound.

At the same time, the right to protect sources is not a licence for journalists to operate without accountability. But any exception must be defined, necessary and subject to independent judicial oversight. Unchecked access to newsroom records could undermine both source protection and the public's right to know. The Supreme Court must strike a careful balance between privacy and press freedom. An explicit exemption for bona fide journalistic activity, alongside safeguards against the disclosure of confidential sources, would help prevent the law from impeding public-interest reporting.

Ethanol policy

Clarity is a must to facilitate transition

BARELY 24 hours after the Road Transport Ministry notified changes in the Central Motor Vehicles Rules to permit flex-fuel vehicles designed for E100 (nearly pure ethanol), the Petroleum Ministry has stated that there is no immediate plan to increase ethanol blending beyond 20%. Perhaps the government should think its own potentially good idea through before manifesting an embarrassing flip-flop. The E100 move promises reduced dependence on imported crude oil, but it raises questions about affordability, infrastructure and the long-term ethanol policy. Without reliable supplies, car buyers may find themselves paying for advanced technology that they cannot conveniently use. Moreover, conventional petrol vehicles cannot safely use E85 (85% ethanol, 15% petrol) or E100 unless specifically designed and certified for these blends. Clear communication and adequate consumer protection are therefore essential.

The distinction between authorising the use of technology and changing the national blending target must be explained clearly to dispel doubts. Also, ethanol expansion should not come at the cost of food security. The exclusion of sugar-based ethanol from the 2026-27 procurement tender reflects concerns over domestic sugar availability. Greater reliance on maize and rice, meanwhile, demands careful assessment of food supplies, agricultural prices, water use and pressure on land resources. Claims of savings on oil imports must be weighed against these costs.

India should pursue ethanol innovation, but not treat it as a universal solution. Transparent fuel pricing, independent vehicle performance assessments and dependable distribution networks must accompany regulatory changes. Whether E100 becomes widely beneficial will depend less on what the rules permit than on how responsibly the policy is implemented and how effectively public trust is built.

Litmus test of economic resilience

As buffers thin and inflation broadens, new challenges are arising



DHARMAKIRTI JOSHI
CHIEF ECONOMIST, CRISIL LIMITED



BURDEN : Sustained food inflation can have a disproportionate impact on household budgets. PTI

RESILIENCE has been the defining feature of the global economy over the past year. Despite heightened geopolitical tensions and supply-side disruptions, economic activity has consistently outperformed expectations.

Reflecting this strength, the International Monetary Fund (IMF) raised its global growth forecast to 3.1% for 2026 and expects growth to improve to 3.4% in 2027, while cautioning that downside risks remain dominant.

India has mirrored this resilience. Real gross domestic product (GDP) growth was a stronger-than-expected 7.7% in fiscal 2025-26 despite tariff-related uncertainty and global volatility. The economy expanded by 7.8% in the first quarter (April-June) of the current financial year, and high-frequency indicators point to sustained momentum in the second quarter.

Not surprisingly, the IMF has revised India's growth forecast upward to 7% from 6.6% for 2026-27.

While growth has remained resilient, inflation is beginning to re-emerge as a concern. Global inflation is projected to rise to 4.7% in 2026 from 4.1% in 2025. Inflation is expected to exceed central bank targets in many inflation-targeting economies. In India, we expect inflation to rise to 5.3% this financial year from 2% in the last fiscal, with risks tilted to the upside.

Several factors explain the surprising resilience of global growth. Foremost among them is the powerful investment cycle driven by artificial intelligence (AI) in the US.

The rapid expansion of AI infrastructure has stimulated investment directly while generating spillovers for economies supplying semiconductors, electronics and other critical inputs. AI-related investments are expected to account for nearly 3% of US GDP in 2026.

The benefits of this investment boom, however, have not accrued evenly. India has gained little directly because it is not a significant manufacturer of inputs used in AI infrastructure. Instead, economies such as Taiwan, South Korea and Vietnam, which are deeply embedded in AI-related supply chains, have emerged as key beneficiaries.

The relatively modest increase in crude oil prices despite severe disruption to energy infrastructure and the temporary closure of the Strait of Hormuz has helped, too.

The energy shock of 2026 is widely regarded as one of the largest on record, yet oil prices have remained well below what doomsayers anticipated.

For India, the impact was mitigated by the diversification of crude sourcing and timely policy interventions. Households were largely shielded from higher energy costs as the government and oil companies absorbed a substantial portion of the increase.

Global demand dynamics also helped contain the rise in crude prices. Significant inventory drawdowns, particularly in China, and rapid electric vehicle adoption moderated crude oil demand and prevented a sharper increase in prices. This provided important relief for India, which imports more than 85% of its crude oil requirements.

India's downstream refining sector provided an additional buffer. Higher crude prices were accompanied by a sharper rise in refined petroleum product prices, partly because refinery disruptions elsewhere curtailed supply. As a result, petroleum exports grew strongly in the first half of this fiscal, easing pressure on oil companies and narrowing the oil trade deficit.

> Inflationary pressures are no longer confined to food. Costs of key industrial inputs such as metals and energy have also increased sharply.

That cushion, however, is beginning to weaken. Crude oil prices have moved higher again as supply disruptions have outpaced demand moderation and global inventory buffers have thinned. As a result, crude oil prices may remain elevated for longer, increasing risks.

Global trade has also displayed remarkable adaptability by rerouting supply chains and diversifying export markets, which has kept trade activity robust, particularly across Asia.

India's merchandise exports saw healthy growth in the first half of this fiscal (April-September), supported not only by petroleum products but also by electronics, engineering goods and chemicals. This helped contain the deterioration in the trade balance.

Domestic demand has also remained supportive. The impact of goods and services tax (GST) rate cuts in 2025 was particularly visible in the automobile sector, while income tax relief boosted household purchasing power. Passenger vehicle and two-wheeler sales grew strongly in the first half of this fiscal, and credit growth remained in the high single digits.

Even so, India's growth is likely to moderate in the second half of this fiscal as some of the factors that supported activity begin to fade and new domestic headwinds emerge. The boost from the GST cuts would ease as firms increasingly pass through higher input costs to consumers.

Weather-related risks have become a key concern. The monsoon season ended with rainfall 13% below the long-period average and significant temporal and spatial imbalances. According to the India Meteorological Department, 40% of India's districts are facing deficient rains, raising concerns about agricultural output and food prices. The risks extend beyond the kharif season as a weaker monsoon can reduce soil moisture and reservoir levels, affecting rabi production as well.

These domestic risks coincide with a deteriorating global food outlook. Rising agricultural input costs and an intensifying El Niño are placing upward pressure on food prices worldwide and increasing the likelihood of weather-related disruptions to agricultural production across regions.

For India, this can create a double challenge: weaker domestic farm output and firmer imported food prices. The risks are particularly acute in edible oils, where high import dependence and rising global prices have already pushed inflation in the category close to double digits.

Since food accounts for a larger share of expenditure among lower-income households, sustained food inflation can have a disproportionate impact on household budgets and complicate inflation management.

Moreover, inflationary pressures are no longer confined to food. Alongside rising food prices, costs of key industrial inputs such as metals and energy have also increased sharply. This is reflected in wholesale price inflation, which rose to 11.4% in September. When input costs rise amid healthy demand, producers tend to pass them on to consumers, broadening inflationary pressures across the economy.

Against this backdrop, the Reserve Bank of India has recalibrated its policy stance to preserve price stability. Following the 25-basis-point increase in the repo rate in October, we expect another increase of similar magnitude in December.

Unlike the last fiscal, when policy rates were reduced and financing conditions remained accommodative, higher interest rates are likely to raise borrowing costs.

Ultimately, an economy's resilience depends on the strength of its buffers relative to the magnitude of the shocks it faces. Those buffers are beginning to thin. Elevated crude oil prices, El Niño and a weak monsoon warrant close monitoring in the near term.

Over the medium term, strengthening energy security, securing supply chains, creating productive employment opportunities and advancing structural reforms will be essential for sustaining higher and more durable economic growth.

THOUGHT FOR THE DAY

Only a crisis — actual or perceived — produces real change. — **Milton Friedman**

Someone else's grandfather

AADYA GHOSH

I wanted to hug him tightly and inhale that comforting smell associated with old people. I wanted to hold his wrinkled hands and talk to him. He looked fragile. In this bus full of people wearing earphones and headphones, he sat there looking around, alone. A girl sat in the seat in front of me, apparently his granddaughter. She was in her late twenties, older than I was. I wouldn't have let my grandpa sit anywhere else except beside me.

I wanted to know about the times he had lived through, which were surely quite different from mine. What kind of life had he lived? An urge arose in me to befriend him. Why did I feel like that? Was it because I was travelling alone and was desperate to talk? I don't think so. I loved to travel alone, and the view of the hills was captivating enough. Never before had I felt such a pressing need to interact just because I felt lonely. Why was I so desperate? Maybe because I couldn't bear his loneliness. Perhaps that was why I put my earbuds back into their case. I wanted to sit beside him and just be there. I wanted him to feel that he had company.

The bus halted in front of a dhaba for us to grab something to eat. Many passengers got down. He stood up and carefully made his way down the bus steps.

Soon, it was time for the bus to leave. The driver got in and started the engine. The old man had not returned. The girl began to worry a little, but he climbed back inside quickly, just in time. He was surprisingly spry for his age. He reached into his waistcoat pocket and took out a banana he had bought. He smiled and handed it to his granddaughter.

Why did I grow impatient when he took time to return? Maybe I saw in him someone I had lost and wanted to tell the granddaughter, who had her earphones firmly in her ears, that she should spend some time with him. She didn't seem to realise how precious those moments were.

I lost my own grandfather, so I knew the pain of loss. She, too, would lose hers one day. I hated to say this, but he might not have much time left. Then she would regret not having spent more time with him. Maybe she would also look closely at someone else's grandfather and remember her own.

The writer is a student at Panjab University, Chandigarh

LETTERS TO THE EDITOR

Profound lessons for humanity

Apropos of 'Learning from the *Panchatantra*'; written in Sanskrit, the *Panchatantra* has travelled across languages and cultures. Though seemingly meant for children, its animal fables convey profound lessons for humanity. Its ancient wisdom may hold remarkably relevant answers to contemporary economic, political and social challenges. The real tragedy is that we continue to revere this treasure of wisdom without systematically testing its timeless insights against modern realities.

VK ANAND, CHANDIGARH

Ensure justice for all

Refer to 'The curious case of Umar Khalid'; the faith of the common man in the judicial dispensation of justice runs deep. However, when this faith is dimmed by procedural irritants and avoidable delays, urgent course correction becomes necessary. The apex judiciary is under a constitutional obligation to direct time-bound trial proceedings rather than adopting a passive stance. Article 21 mandates that procedures established by law must be just, fair, and reasonable under natural justice. National security and sovereignty are paramount, but *justitia omnibus* (justice for all) must be ensured.

ABHYAM SHARMA, PATHANKOT

Populist appeasement won't work

Refer to 'Is anyone crying for me, asks Punjab'; welfare support for the genuinely needy is essential, but it must never become a substitute for development. Unless corruption is confronted, drugs are decisively controlled and young people are offered real opportunities, Punjab's decline will continue, threatening its future. Political slogans and populist appeasement won't work.

VITULL K. GUPTA, BATHINDA

Need upright, competent judges

Refer to 'Ex-PM Narasimha was prophetic; Collegium system won't work in longer term : Justice Kaul'; no system is foolproof; the tragedy is the wrong people are often in the right positions. Consequently, litigants continue to suffer endlessly. Every pending case represents the affected person in limbo, waiting for closure and vindication. The administration of justice would be more effective if judges performed their duties competently rather than mishandling cases. Upright judges and committed lawyers can save the day.

ANIL BHATIA, HISAR

Make stubble mgmt cheaper

Apropos of 'Stubble burning'; the uncomfortable truth is that burning remains cheaper, quicker and more convenient for farmers than the scientific disposal of paddy residue. This economic reality must change if the recurring crisis is to be resolved. There is a need to make scientific residue management cheaper, easier and more rewarding than burning. Farmers need practical alternatives, timely support and economic incentives, not blame alone. Public expenditure must translate into measurable environmental gains.

MM GOEL, KURUKSHETRA

Blanket ban not in public interest

Apropos of 'Patients bear the brunt as Punjab chemists stop sale of habit-forming drugs'; while no chemist should face unnecessary harassment for complying with police and health orders, a blanket suspension may cause hardship to patients who genuinely need these medicines. Instead of halting sales, the authorities should sit with the chemists' association to protect honest retailers and safeguard patients' access to essential medicines.

BALBIR SINGH KAKKAR, JALANDHAR

Letters to the Editor, typed in double space, should not exceed the 200-word limit.
These should be cogently written and can be sent by **e-mail to: Letters@tribunemail.com**

ON THIS DAY...100 YEARS AGO

The Tribune.

LAHORE, THURSDAY, OCTOBER 28, 1926

India and the Empire's economic problems

AT the Imperial Conference held on the 23rd, several problems relating to the economic prosperity of the British Empire as a whole and of the various members individually were discussed. The main point raised was that there was a great future for the Empire if only the principle of preferring Empire produce and Empire goods was better understood and adopted by all concerned. Various examples were given to show how the trade between the dominions and colonies with Great Britain was increasing within recent years and how further improvement could be made by fostering a feeling of Imperial unity and partnership. Stanley Bruce, the Australian Prime Minister, was most eloquent when he said that the position of the British Empire in the world, its prestige and its authority in the comity of nations depended more upon its commercial pre-eminence than upon its armed forces or military strength. He said the unity of the Empire and its progress could best be assured by adding ties of mutual interest to the intangible ties that bound them together. Only South African statesmen appear to have sounded a discordant note in this matter. General Hertzog's speech has been somewhat severely criticised by the British press for his statement at the opening of the conference that South Africa did not wish to remain within the Empire. EC Harmsworth, MP, writing to the *Despatch* says: "We are at the parting of the ways. There is an acute crisis in the Empire."

The predicament of higher education



ARVIND
PROFESSOR, IISER, MOHALI &
EX-VC, PUNJABI UNIVERSITY

SHOULD higher education serve as a civilisational compass — shaping society's conscience, intellectual horizons and future leadership — or is it merely an instrument designed to service short-term needs? This central question needs to be addressed as its answer shapes higher education as well as the disposition of the state and the people towards it.

The civilisation continues to be influenced by philosophers, litterateurs, scientists, engineers and scholars. It is the responsibility of the higher education system to produce such thinkers and shapers of society. This philosophy was kept in mind while setting up universities post 1947, though policymakers then were aware that a large cohort of technically trained human resource for development was needed.

Over the last three decades, this balance has become skewed. Under market-driven neoliberal policies, commercial forces now dictate the terms of higher education. Institutions are being pushed to respond to demand, while the state abdicates its duty by treating education as a self-financing commercial service. The result is the marginalisation of public institutions and higher education falling in private hands, who run them as profit-making commercial enterprises.

The last time Punjab hired regular teachers in government colleges was in 1996. Departments in Guru Nanak Dev University, Punjabi University and Panjab University, the three major affiliating universities, are short of faculty. Departments that were once vibrant academic centres are on the verge of closure.

Punjabi University's Political Science Department has only two regular faculty members, GNDU's History Department three faculty members and no professor and Panjab University's Department of Punjabi has two regular faculty members. The situation is appalling.

Once the continuity of research is lost, it is almost impossible to rebuild it; it is like losing an ecosystem. The project of developing the Punjabi language in a way that it can face the challenges and be used for every human expression has been jeopardised.

Another dimension of this crisis can be seen in the increase in fees in universities. Why do government-funded universities like GNDU have to charge tuition fees of over Rs 50,000 per semester for MSc (physics) and even higher amounts for courses like BTech? In 1985, the tuition fees for MSc (Physics) was about Rs 300, which with inflation would today be around Rs 5,000.



SUPPORT : Nominal tuition fees should be restored across state colleges and universities. FILE PHOTO

The third aspect of this crisis began within the institutions. The first generation academicians who started various disciplines in universities were eminent professionals. But later, a decline of academic standards set in primarily due to inbreeding. The culture of attracting faculty of academic excellence waned. Academic standards further declined due to the atmosphere of terror that prevailed in Punjab for a decade.

It is surprising that a new faculty member joining a university in Punjab does not get the full salary for three years but gets only the basic pay. Why would any scholar who has done good research and worked as a post-doc in an international centre accept such treatment?

> The last time Punjab hired regular teachers in government colleges was in 1996.

The primary driver of the crisis is the adoption of neoliberal economic policies in 1991, when funding for higher education was curtailed and universities were directed to generate their own resources. Universities were forced to raise tuition fees and freeze faculty recruitment to balance their budgets.

The irony of this situation becomes obvious when one weighs the minuscule economic savings generated by this restructuring against the catastrophic damage inflicted on academic institutions. In any case, India spends very little on higher education — barely 1.2% of its GNP — and cuts made here yield negligible fiscal gains even as they are devastating the sector. We have never approached the 6% of GNP target for overall education, as recommended by the Kothari Commission in 1966.

Let us look at the economics by taking the case of Punjab. The state's current annual expenditure on higher education is around Rs 1,500 crore. Even if we were to fill every vacant teaching post across colleges and universities, the outlay would not exceed Rs 2,000 crore. In comparison, the annual outlay for a single subsidy — providing 300 units of free power to households, a measure that was not even a sustained public demand, stands at nearly Rs 6,000 crore. That alone could fund a three-fold expansion of the public higher education sector. Why not make higher education tuition-free instead of subsidising power? Establishing and vibrant education system requires the right political priorities.

Punjab's education system can be revitalised if the state invests in its intellectual infrastructure through the following eight strategic policies:

1. Double the budget and end the recruitment freeze: Double state outlays for higher education over the next fiscal cycle and launch a transparent recruitment drive to fill all vacant regular faculty posts.

2. Overhaul public campus infrastructure: Modernise physical facilities across state institutions by building new student hostels, technologically equipped classroom complexes and advanced scientific laboratories.

3. Restore subsidised public education: Roll back post-1991 fee hikes and restore nominal tuition across state colleges and universities. While the revenue is negligible to the state exchequer, eliminating fees makes higher education accessible to rural and underprivileged youth.

4. Nurture foundational disciplines: Protect core departments in humanities, social sciences and regional languages to safeguard critical inquiry.

5. Establish well-funded niche research centres: Build specialised centres of excellence aligned with regional strengths, spanning frontier sciences, agrarian ecology, computational linguistics and historical studies.

6. Modernise Punjabi language: Launch mission-mode initiatives to develop Punjabi into an active medium for science, law and medicine by integrating it with artificial intelligence and natural language processing.

7. Upgrade regional centres into public universities: Consolidate regional centres and constituent colleges to create at least three autonomous, full-fledged public universities, decentralising advanced education.

8. Foster multi-disciplinarity and campus democracy: Introduce porous, interdisciplinary curricula across sciences and humanities while restoring democratic student union elections and institutional representation.

ITBP & unsettled borders



LT GEN PRADEEP BALI (RETD)
MILITARY COMMENTATOR

THE recent statements about the situation on the LAC between India and China by the Director General of the ITBP can at best be described as unusual. Speaking at a felicitation ceremony of this force in Alwar, the DG mentioned about face-offs at several locations in Arunachal Pradesh and the stellar role being played by commando outfits of this force. Interestingly, he also stated that "the ITBP was raised as a mountain guerrilla force" and that now "a specialised high-altitude mountain fighting force is being set up, which will be different from the army."

While making such comments at an internal event of a uniformed force to boost morale by hyperbole may not be uncommon, but ensuring that these reach the media gives it a different complexion. This statement was put up on the social media by the ITBP and later pulled out! But the damage had been done as it became a political football. The MEA had to clarify that divergence from established patrolling patterns by the PLA disturbs the situation.

Face-offs between the Indian Army and the PLA and its border guarding regiments have been taking place for many years on the 3,488-km LAC. However, following the large number of fatalities at Galwan in June 2020, any such contact draws attention. We are faced with an adversary who will unscrupulously attempt bullying tactics and fisticuffs for seizing dominating areas. This state of affairs is likely to continue as the PLA will endeavour to claim positions of advantage along our borders.

All this leads to an important issue about the role and deployment of the ITBP and its synergy with the army formations along the LAC. The ITBP, which is under the Ministry of Home Affairs, has 64-odd battalions with a strength of about 90,000. Its primary role is to patrol the India-China border. But ITBP units are also deployed on different type of security duties in the country that have nothing to do with border policing.

Further, such a responsibility on police forces can be viable only along settled borders, where the primary role is to check illegal immigration and smuggling. Even in the case of the western neighbour, while the international border has sole deployment of the BSF, the LoC in J&K, which is prone to terrorist infiltration, has an army presence in posts.

> The LAC is a live border with China, where the threat is of intrusions and encroachments by the PLA.

The LAC with China is a different matter. It's an unsettled and live border with our adversary, where the threat is of intrusions and encroachments by the PLA, which cannot be guarded against by border policing. During recent clashes and standoffs, army formations have been fully involved, resulting in their enhanced deployment all year round.

The ITBP is a fine force with hardy troops who are located at far-flung heights, from Arunachal to Ladakh. However, the deployment pattern is not suitable for facing the threat from across the LAC. The HQs are located too far away to influence operational situations that may emerge at short notice. Its potential thus remains underutilised.

Perforce, army units deployed well forward and at places in eyeball contact, have to safeguard the LAC. Ironically, the ITBP is not under operational control of the army. Opposite us, the border defence regiments are under PLA formations in the region, resulting in seamless operational functioning.

The army appears to be fully stretched at present, not only due to enhanced deployment, but also troop shortages due to new recruitment policies which are now manifesting in a negative manner. Despite the clamour for downsizing the army with more reliance on technology, the vigil along the unsettled borders will remain manpower-intensive for the foreseeable future.

For full article, go to www.tribuneindia.com/opinion

Sanctuary without slogans



SHELLEY WALIA
FORMER PROFESSOR & FELLOW,
ENGLISH & CULTURAL STUDIES, PU

ON October 10, as the Delhi Police closed in on demonstrators demanding the resignation of the CEC and an end to the revision of electoral rolls, some 250 protesters took shelter in Gurdwara Bangla Sahib. The management, which had offered them langar and a place to rest, later voiced concern for the sanctity of the shrine. When the police posted outside asked that the protesters not be allowed to stay, a bitter controversy followed. Behind it lies a question as old as religion itself: what does a house of worship owe those who seek its protection, and where must political activity stop?

To answer it, we must begin with the compact on which a sanctuary rests. It is a compact between those who offer shelter and those who seek it and it endures only as long as each side respects its limits.

Greek temples sheltered fugitives, the Hebrew Bible sets aside cities of refuge and in medieval England, a man who reached a church could stay under its protection for 40 days before facing trial. In the 1980s, American churches sheltered refugees from Central America against the wishes of their own government.

The state, as Max Weber put it, claims the sole right to use legitimate force. Sanctuary is the old custom that sets a limit to that claim by offering shelter to people running away from the onslaught of the state. Its moral basis is the refusal to ask, before helping, what the person's politics are. A gurdwara, church or temple need not share the slogans of those it admits, and it may offer food, water and safety to people whose methods it may never endorse.

This principle was put to a test in April 2017, when nearly 40 students of Panjab University, Chandigarh, took refuge in the campus gurdwara while police waited outside. They had been protesting against a fee hike and had been dispersed with water cannon and tear gas. What they wanted was safety. They did not ask the gurdwara to take a position on tuition. Admitted without regard to politics, the students cannot turn the premises into a political base. Slogans and demonstrations inside a place of worship would be morally culpable. If this trust breaks, every shelter would become suspect, and the price will be paid by the next person who finds the door shut.

> What does a house of worship owe those who seek its protection, and where must political activity stop?

The strongest objection comes from within the Sikh tradition itself. Guru Hargobind wore two swords, one for miri, temporal authority, and one for piri, spiritual authority, and raised the Akal Takht opposite the Harmandir Sahib in Amritsar. The doctrine rejects the notion that faith may be confined to private prayer while power and suffering go on outside the door. A gurdwara has never been expected to be silent on justice. On this reading, the young people at Bangla Sahib had every claim on the house.

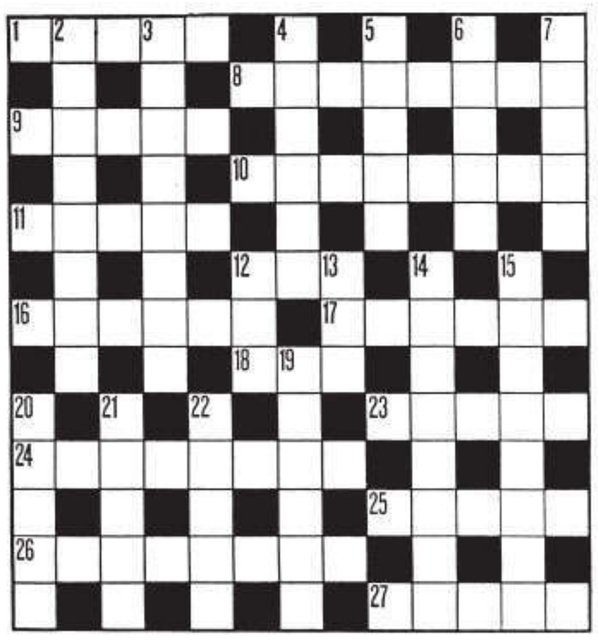
At the heart of this debate is the idea that a sanctuary confers no legal immunity. Whether an entry, a search or an arrest on religious premises is lawful depends on the law, and no institution can place itself outside the state's jurisdiction. But the authorities are equally obliged to exercise restraint when they pursue frightened young people into a house of worship.

A religious institution that offers humanitarian help should not find the offer treated as defiance merely because those helped are critics of the government. It may also decline, if the circumstances are too dangerous or its premises too limited, and it should not have to justify either choice as a political act.

The young people at Bangla Sahib, asked for a night's safety while the police waited outside. A society is in good order when a request of that nature can be made and granted without anyone needing to explain it as a political act.

For full article, go to www.tribuneindia.com/opinion

QUICK CROSSWORD



ACROSS
1 Great pain (5)
8 Start shooting (4,4)
9 Book of maps (5)
10 Reveal (8)
11 Punctuation mark (5)
12 Hatchet (3)
16 Small, dark plum (6)
17 A bath sponge (6)
18 Barrier restraining water (3)
23 Scrutinise (5)
24 Long queue of traffic (8)
25 Unanimous (5)
26 Border of a country (8)
27 Carousal (5)

DOWN
2 Exceed accepted limit (2,3,3)
3 A narrowly avoided collision (4,4)
4 Egyptian desert statue (6)
5 Particular aptitude (5)
6 Stubbornly intolerant person (5)
7 Intense agitation (5)
12 In addition to (3)
13 A hard, heavy wood (3)
14 Flattery (4,4)
15 Uncompromising policy (4,4)
19 Toxophilite (6)
20 Inflexible (5)
21 Of secondary importance (5)
22 Grow less (5)

Yesterday's Solution

Across: 1 Bottomless, 6 Fire, 10 Miami, 11 Competent, 12 Vermouth, 13 All in, 15 Leakage, 17 Wildcat, 19 Awkward, 21 Vertigo, 22 Viper, 24 Sundries, 27 Shortfall, 28 Build, 29 Deft, 30 At variance.

Down: 1 Bump, 2 Trademark, 3 Opium, 4 Lecture, 5 Somehow, 7 Ideal, 8 Extinction, 9 Retailer, 14 Ill-advised, 16 Alacrity, 18 Criterion, 20 Distant, 21 Vanilla, 23 Proof, 25 Rabbi, 26 Idle.

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HARD

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YESTERDAY'S SOLUTION

9	7	3	5	6	1	2	8	4
8	6	4	2	3	7	5	1	9
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4	5	6	7	1	2	9	3	8
7	3	2	8	9	5	1	4	6
1	9	8	6	4	3	7	5	2

CALENDAR

OCTOBER 28, 2026, WEDNESDAY

Shaka Samvat	1948
Kartik Shaka	6
Kartik Parvishte	12
Hijari	1448
Krishna Paksha Tithi 3, up to 1:07 am	
Vyatapata Yoga up to 7:19 am	
Variyan Yoga up to 3:41 am	
Kritika Nakshatra up to 1:26 pm	
Moon in Taurus sign.	

FORECAST

SUNSET: WEDNESDAY 17:38 HRS
SUNRISE: THURSDAY 06:35 HRS

CITY	MAX	MIN
Chandigarh	32	15
New Delhi	30	16
Amritsar	28	16
Bathinda	30	12
Jalandhar	30	15
Ludhiana	32	15
Bhiwani	30	16
Hisar	30	15
Sirsa	29	16
Dharamsala	27	14
Manali	21	08
Shimla	22	12
Srinagar	22	03
Jammu	29	15
Kargil	13	00
Leh	11	–04
Dehradun	30	13
Mussoorie	22	11

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Editor's TAKE

Lula makes a historic comeback

Luiz Inácio Lula da Silva's unprecedented fourth-term victory offers a reprieve for Brazilian democracy and checks the region's rightward drift

With the victory of Luiz Inácio Lula da Silva, 80, Brazil has once again shown that it does not believe in hollow nationalism. Lula beat Flávio Bolsonaro with 51.8 per cent of the vote, a margin of about 4.4 million ballots. Lula's win has surprised many, as he was not doing well before the election.

It will be debated for a long time why Lula won. The economy helped for sure: inflation is tamed and unemployment sits near record lows. Sovereignty helped more. Washington's tariffs and sanctions, which Donald Trump tied to Jair Bolsonaro's coup trial, let Lula cast himself as the defender of national dignity rather than a tired incumbent. Memory did the rest. Jair Bolsonaro is serving 27 years for plotting to overturn the 2022 vote, and Flávio's promise to secure his father's amnesty reminded voters what a restoration might mean. Flávio, himself under corruption investigation, never escaped that shadow. The protest vote behind his first-round lead proved softer than expected: every runoff poll had him ahead, and all underestimated Lula.

For Brazil, this is a reprieve, not a blank cheque. Lula returns on 5 January, facing a hostile Congress, a narrow mandate and a rival who says he cannot accept the result and will ask the courts to annul it. Governing will demand compromise and fiscal prudence.

Many who backed him did so partly out of fear of the alternative; they will now expect results on prices, safety and jobs, not merely a defence of institutions. At 80, Lula must think about succession; the Workers' Party cannot remain a one-man movement.

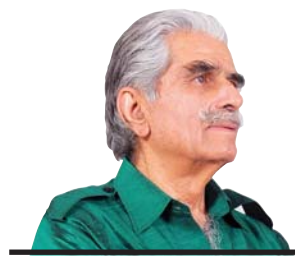
For Latin America, the result checks a rightward tide. Javier Milei openly backed Flávio, and Colombia elected the right-wing Abelardo de la Espriella in June. Lula and Mexico's Claudia Sheinbaum now stand as the region's leading counterweights to Washington's pressure, and Brazil's size gives that resistance heft. Mercosur trade, climate diplomacy and regional integration regain their most influential champion. For Trump, who hailed Flávio's first-round lead as a "big victory", this is a strategic and personal setback: tariffs and pressure failed to dislodge a leader they may even have strengthened. Expect hard bargaining, though Lula has kept the door open, phoning Trump in August to reopen trade talks. The message to the world is plain. Populist nationalism is not invincible.

Democracies that prosecute coup plotters, run credible elections and withstand foreign pressure can still command public trust, and independent courts and electoral bodies, so often cast as obstacles, proved a safeguard. For the Global South, including India, Lula's return preserves a forceful voice for multipolar diplomacy and for BRICS, as great-power pressure on middle powers rises.

Yet a margin this narrow leaves no room for triumphalism. Lula won by defending democracy and sovereignty; he must now deliver prosperity. Brazil survived the assault of 8 January 2023. It must now show, once more, that its democracy holds.

Democracy under barricades

The curbs on peaceful protests in New Delhi raise troubling questions about democratic dissent, institutional autonomy and the excessive use of state power. A democracy must protect the right to question authority, not turn its capital into a fortress against its own citizens



ASHOK K MEHTA



On October 19, I attended a seminar at the Imperial Hotel, which is the epitome of colonial heritage, a relic the owners have diligently protected, preserved and promoted, whereas close by, Delhi Gymkhana Club (DGC), a senior relic, is under threat of eviction and its administration taken over by a government structure. Other colonial facilities in the vicinity, like the Race Course, have been closed down, and the IAF's golf course is in the crosshairs. Previously, the security of the Prime Minister was cited as the reason for this. As a first step, the DGC staff living on the premises had to be relocated. But now, since the PM's residence is being relocated, things should change. The resplendent Rashtrapati Bhawan, the ultimate symbol of colonial legacy, will stay, as will North and South Blocks — their innards, once the nuclear shelter, will become museums.

After the recent protests against the Election Commission of India at Jantar Mantar and other places, Roopchand, driver of the Imperial Hotel, showed me the protest sites and said that, as he could not access the hotel on his bike during the protests, he had to take the metro to East Patel Nagar and then walk the rest of the 10 km to the hotel. If there was a kind policeman near the barricades, he might let him pass. Otherwise, he would have to dodge the police like the protestors, through the by-lanes. He suggested, why not relocate the ECI? My drive through Jantar Mantar, Sansad Marg, All India Radio and ECI was eye-opening. There were at least 20,000 police/paramilitary personnel and millions of barricades and buses neatly lined up along the street to arrest and relocate protestors. It was an ocean of khaki and camouflage fabric even on a non-protest day. On Vijayadashami, the Cockroach Janata Party (CJP, downgraded by the CJI from a cockroach to a fly) was ceremonially put to rest by being burnt along with the effigies of Ravan. But the apparent disenfranchisement of 130mn voters due to 'logical discrepancies', with the courts observing that they can vote the next time, was not extinguished. Social media is agog, citing cases of discrepancy/cheating abetted by the ECI. The disproportionate use of force was augmented with unlawful, undemocratic force multipliers.

UNHRC, Geneva, and several human rights experts criticised the government for blocking the constitutional rights to peaceful protests, which were dutifully rejected by the MEA spokesperson. Al Jazeera and BBC have portrayed the protests fairly and accurately; except for Congresswoman Pramila Jayapal, no official has criticised the treatment of student protesters by the police. US Secretary of State Marco Rubio, in Mumbai on 20 October, said it was an internal political matter. India's strategic autonomy is extremely sensitive to external interference in internal affairs. None of the veterans' social media groups has touched on the student protests, as 12 years of BJP rule have made them immune to such deviations. This took me back to the 1970s, when a batchmate recently recalled the Emergency. He said that, before going to the US for a course, he was interviewed by the then Director General of Military Training, Maj Gen Vir Vohra, who counselled him on how to defend the Emergency. Then, as now, the military has taken a neutral position, though it has sworn to defend the Constitution. He also recalled how, in Bombay, a friend took him to listen to the socialist and anti-Emergency activist George Fernandes speak somewhere near Churchgate, where Fernandes compared the Emergency to the 'silence of the graveyard'. Later, he became the most unlikely defence minister. Every government, regardless of its political stance, has attempted to keep the military under firm civilian control. Any change in army behaviour was contingent on the personality and military ethos of its Army Chief. Some stood up, spoke out and disagreed with government policy, confined to its unconstitutional use, rarely for interference in the Army's internal affairs. After the inept handling of Blue Star (Golden Temple), Army Chiefs have kept a distance from any religious showdown. So, a Maratha battalion located 1,000 m from Ayodhya watched helplessly when Babri Masjid was brought down, though it was duty-bound to protect public property. The Army was similarly held back during the Gujarat riots, though it was ultimately brought in - but too little, too late. All that has changed in the last 12 years. All three services, in some way, participate in functions to celebrate the religion of the majority community, while many units have a secular house of worship. An Air Marshal now heads the Ram Mandir Trust, and the IAF last week performed its annual air show across Namo Ghat, Varanasi, the PM's constituency, while he was present.

SINCE 2014, THE INTEGRITY OF MOST INSTITUTIONS HAS BEEN COMPROMISED. DESPITE THE STATE'S ABSOLUTE CONTROL IN DELHI, STUDENT PROTESTS IN JULY BROUGHT ABOUT A MINISTER'S RESIGNATION AND NOW SEEK THE CEC'S REMOVAL

Since 2014, the integrity of most institutions has been compromised. Despite the state's absolute control in Delhi, student protests in July brought about a minister's resignation and now seek the CEC's removal. This is not any Gen Z uprising like those in Sri Lanka, Bangladesh and Nepal. In India, regime change will happen only through the ballot box, not through street protests. There was once the Arab Spring, which led to regime change. Now, it is Europe's dark winter, but no regime change has taken place through the streets; it has all happened through free and fair elections. People have lost faith in the centre-left or centre-right. Instead, they are looking to the far-right parties, which have made gains in Germany. Protests are ongoing in France, Spain, Serbia, Belgium, Portugal, Italy, Germany, Albania and Greece. But the democratic order will not change through the streets, only through the ballot box.

The establishment's accusation that the opposition and student protestors are attempting regime change is fear-mongering. The students have a legitimate right to carry out peaceful protests; the state's denial of this fundamental right through the use of excessive state violence and preventive law to quell the voice of youth reflects the poor training and confidence of the police in internal security management.

The Prakash Singh report on police reforms must be implemented so that the constitutional right to democratic dissent is protected without the heart of New Delhi resembling a police state.

The writer, a retired Major General, served as Commander, IPKF (South), Sri Lanka, and was a founder member of the Defence Planning Staff, now the Integrated Defence Staff

Anger: Silent enemy, which gains control over us



AJIT KUMAR BISHNOI

2ND OPINION



Yes, whether we realise it or not, anger is a very big enemy. Lord Krishna has warned about it in many verses in the Bhagavad Gita, especially in verse 16.21, when He described it as a door to hell. Anger is that harmful. Surprisingly, some of us think anger is a necessary tool to be used on others. It can be, if it is controlled, which it hardly ever is. The common manifestation is anger taking possession, with eyes turning red and foul words streaming out of the mouth. Some of us take pride in getting angry; how dangerous anger is!

Other characteristics of anger — the ever-present enemy — include the absence of any warning. It makes its dreaded appearance, and we are completely helpless about it. Even people mainly in the mode of goodness — the highest — are guilty of losing control over themselves. The example of Durvasa Muni is a well-known one. Anger is most difficult to get rid of, even more so than lust, if that is possible.

There are several causes for anger to appear. The first one must be inconvenience of some sort. Who wants to be inconvenienced? Overstress is a close second. One is likely to get angry when the pressure is high. Then, the opulence of power makes one use this bad emotion on others willingly. Anyone or even anything can fall prey to it. Others also do their part by inciting anger through unpleasant actions.

There are many harms caused by anger. The first one must be the loss of peace of mind. Bodily signs appear besides red eyes and foul words; one is even ready with threatening gestures. Blood pressure goes up; doctors warn about it. Acidity is a sure giveaway that anger is ruling. I check myself as soon as I begin to feel uneasy. Except in the case of controlled anger with someone near and dear, there is no benefit in getting angry.

How, then, should we deal with this formidable enemy? The first step for me is to seek guidance and help from God — who else? Silent chanting of Krishna, Krishna, Krishna... follows, or should follow, for me. We are habituated to blaming others for our troubles; we forget that, out of the three sources of problems, the self is the major offender. Others and natural forces are distant seconds in this duhkhalaya (place of misery, 8.15).

I find forgiving to be the best antidote to anger. I have realised that to forgive is divine. I watch myself because I don't wish to create more bad 'karmaphalas' (results of acts) than I already have. I try to be careful to react in a proper way, though I am quite frequently unsuccessful. This is part of my routine for self-improvement. Isn't it wise to control anger? All said and done, my battle against anger continues. Please get started now, not later; it is an uphill task to be able to control anger.

The writer is a spiritual teacher and a popular columnist

Daiv Vani

WISDOM FOR A MEANINGFUL LIFE

Understanding the Rude Child: A Word to Parents

A rude child is often telling us something, in the only words he or she has.

Our tradition does not ask parents to respond to rudeness with rudeness or give in to it. It asks for something wiser, which depends on the child's age. A verse attributed to Chanakya says: *"Lalayet pancha varshani, dasha varshani tadayet; prapte tu shodashe varshe putram mitravad acharet."* Shower love in the first five years. In the next ten, guide with firmness, so that the child learns limits. When the child turns sixteen, treat him or her as a friend. The word "tadayet" literally means to chastise, but its spirit today is firm and steady training, not harshness.

The Gita gives parents a rule for every difficult conversation: "Anudvegakaram vakyam satyam priya-hitam cha yat" (17.15). Speak so that you do not agitate, speak truthfully, speak pleasantly, and speak for the listener's good. The Taittiriya Upanishad records a teacher's farewell words to his students: "Whatever good conduct you see in us, follow that." Children follow what they see more than what they are told. If we want gentle speech from them, our own tone at home is the first lesson. Behind a rude reply there is often tiredness, fear, shame or a longing to be heard.

Today, when your child is rude, wait for three breaths before answering. Reply with one sentence that is true, kind and useful, and later, in a calm moment, ask what was behind the outburst. –DAIV

PIC TALK



People gather at the Golden Temple to pay obeisance on the birth anniversary of Guru Ram Das, the fourth Sikh Guru, in Amritsar, Punjab PHOTO: PTI

LETTERS TO THE EDITOR

Rally should not disrupt Diwali trade

With reference to the news report, "Traders urge Rahul, INDIA bloc to defer November rally till after Diwali" (October 27), the proposed rally by the INDIA bloc at Delhi's Ramlila Maidan on November 1 has raised serious concerns among traders.

The rally, demanding the removal of Chief Election Commissioner Gyanesh Kumar over alleged large-scale electoral roll deletions, could disrupt business just days before Diwali, potentially causing losses estimated at ₹10,000 crore. Ramlila Maidan lies within five kilometres of several major wholesale and retail markets. Traffic diversions, barricading and possible metro station closures could prevent customers from reaching these markets. The Delhi Chamber of Trade and Industry has urged Rahul Gandhi to postpone the rally until after November 10 to protect traders' interests and allow people from Delhi and neighbouring states to complete their festive shopping. November 1 also marks the anniversary of the 1984 anti-Sikh violence following Indira Gandhi's assassination. Any politicisation of this sensitive issue could disturb communal harmony.

Considering traders' concerns, the potential economic losses and the public's need to celebrate Diwali peacefully, why can't the INDIA bloc postpone the rally?

P VICTOR SELVARAJ | TAMIL NADU

No one is above the law

The rising number of fatal accidents caused by underage drivers in Kerala and across the nation is a matter of grave concern. Before Kerala could recover from the heart-wrenching Kochi-Nedumbassery tragedy, in which an intoxicated 19-year-old driving a Mini Cooper killed three scooter riders, another life was lost in Kochi's Cheranalloor. In this latest incident, a scooterist was killed by a Mercedes-Benz allegedly driven by a 17-year-old minor. The minor, the son of an additional sessions judge, was reportedly taken into custody again only after intense protests by the victim's grieving family. Recent reports state that his father has also been arraigned as an accused in the case. The incident has sparked public debate over the leniency often granted to perpetrators because of their age.

As a society, we must take collective responsibility for preventing minors from driving. Parents must be held legally accountable and penalised severely for allowing unlicensed minors to drive their vehicles. Furthermore, no one's wealth, position or influence should provide an escape route from justice. Fatal, reckless acts must be dealt with firmly under the law, regardless of the perpetrator's background. Let us not forget that no one is above the law.

M PRADYU | KANNUR

Political discourse needs decorum

Apropos, "Kharge's Modi remark sparks BJP protests", October 27. AICC president Mallikarjun Kharge's reported remark, "Modi ka baap bhi jayega", referring to Prime Minister Narendra Modi at an event in Patna, reflects political frustration and crosses the boundaries of decency and decorum expected from a leader of his stature. Political differences are natural in a democracy, but personal insults against the Prime Minister undermine the dignity of public discourse.

By insulting a leader elected by millions of Indians, such remarks risk being seen as disrespectful to the people who have placed their trust in him. Senior politicians must demonstrate maturity, restraint and responsibility in their public statements.

Such name-calling often occurs when leaders shift their focus from serving the people to politicising issues for political gain. Instead of resorting to personal attacks, leaders should offer constructive criticism, credible alternatives and solutions to public problems.

Democracy deserves responsible debate, not reckless rhetoric. Political leaders must remember that their words carry weight and influence public sentiment. Maintaining dignity in political discourse is essential to preserving public trust in democratic institutions.

N SADHASIVA REDDY | BENGALURU

The Pioneer
NEW DELHI | WEDNESDAY | OCTOBER 28, 2026

Cricket's wealth must not come at the cost of other sports

The BCCI's lavish payments to cricketers, coupled with questions over transparency and accountability in sports administration, highlight India's growing sporting inequality. Reforming cricket governance and redirecting public support towards neglected disciplines such as hockey are essential to building a more balanced sporting culture



SUBHASH CHANDRA AGRAWAL



It is indeed surprising that the Board of Control for Cricket in India (BCCI) is not a recognised National Sports Federation, and that giving salaries and pensions to cricketers is an internal matter for the BCCI. It should be declared a public authority under the RTI Act, as recommended by the Law Commission following a Supreme Court verdict. Huge amounts of public money are spent by the BCCI on salaries and pensions for individual cricketers and coaches. Vinod Rai, chairperson of the Supreme Court-appointed Committee of Administrators (CoA), tasked with ensuring the implementation of the Justice RM Lodha Committee report on the BCCI, warned on 03.07.2018 that the then election results of the Delhi and District Cricket Association (DDCA) could be annulled because of ethical and constitutional inadequacies.

He further pointed out that the elections had taken place without a constitution endorsed by the Supreme Court and that the DDCA had failed to put in place the Supreme Court-advocated checks and balances to avert possible conflicts of interest.

Elections witnessed an extraordinary amount of money being spent by groups contesting them. The elected DDCA chairperson had to resign after the unruly Annual General Meeting (AGM) held on 29.12.2019, with signatories refusing to sign hefty bills of ₹1 crore in legal fees for just one month and ₹90 lakh to spruce up marquee stands for a T20 International, against about one-third of the awarded tender.

For the convenience of candidates and voters, groups contesting all posts should be recognised by specific names, and group candidates may be numbered according to the alphabetical order of their group names, which should be placed at the top of the Electronic Voting System.

Independent candidates can be placed alphabetically after group candidates. Since voters are mostly literate, even a system of preferential voting can be implemented to avoid candidates winning because of a split in votes.

Necessary safeguards should be ensured for future elections to the DDCA or any other state-level cricket body so that the use of money power in campaigning may be restricted. Moreover, for the convenience of candidates and voters, groups contesting all posts should be recognised, particularly when many cricketers have annual salary packages of ₹ 7 crore (for a cricket coach, it is ₹10 crore), apart from hefty match and award money.

All direct and indirect facilities and funding provided by central and state governments should be given only to recognised sports federations. As such, these should be immediately withdrawn from the BCCI and its affiliated cricket bodies, which also include some government bodies apart from state cricket associations. However, the BCCI remains outside the purview of the RTI Act because heavyweight politicians cutting across party lines have deep administrative control over the BCCI and state cricket associations, despite not having played a single cricket match in their lifetimes.

The BCCI should totally abolish its policy of paying salaries and pensions to cricketers. Indian cricketers receive hefty match and award money, apart from their substantial income from commercial advertisements. If the BCCI does not stop the system of salaries and pensions for cricketers and coaches, the central government should take over the BCCI as part of the Department of Sports.

Sportspeople performing exceptionally well in other games have to lead miserable lives because of low incomes and the inability of their sports bodies to pay as much as the BCCI does. In no case should any cricketer be paid a salary or pension exceeding that fixed for the country's highest-paid bureaucrat. The BCCI must not have the right to spend funds generated by public enthusiasm on paying cricketers excessively.

The chairperson of Maruti once offered a practical suggestion that top managements should avoid paying obscene salaries to those at the top. Instead, there should be a formula whereby the highest-paid person in an organisation receives a maximum of 15-20 times the salary of the lowest-paid staff member. The same formula must apply to the BCCI. If the BCCI's earnings are the criterion for payments to cricketers, priests of famous temples could also demand hefty payments based on temple income. The central government should ensure that BCCI funds are utilised for public welfare schemes in the manner in which income from famous Hindu temples such as Tirupati is spent.

It is noteworthy that, despite Pakistani cricketer Shahid Afridi having made highly objectionable comments against India and the Indian Prime Minister, with Pakistani army personnel standing with him somewhere in Pakistan-occupied Kashmir (PoK), the Shahid Afridi Foundation's website continued to display messages of support from Indian cricket legend and Bharat Ratna Sachin Tendulkar. Later, Yuvraj Singh and Harbhajan Singh withdrew their support messages from the website. The Indian Prime Minister also faced foul and filthy comments on the website, which were even more dangerous than corona.

Leading cricketers are hesitant to make clear-cut statements in favour of the BCCI imposing much-needed harsh conditions on the International Cricket Council (ICC) to expel Pakistan, which is accused of generating terror, from the ICC. This is obviously because of the hefty monetary receipts they receive from the BCCI in the form of annual salary packages, pensions, match money and award money, amounting to crores of rupees per cricketer annually. The Pakistan Cricket Board (PCB) and the ICC are financially dependent on Indian cricket. The ICC cannot function without India's membership. . Isolating Pakistan in every field would practically ruin the country economically, which is a better option than war.

Following a CIC verdict, Hockey India revealed that 10,917 complimentary tickets were issued for the 2014 Men's Champions Trophy in Bhubaneswar, while 22,935 tickets remained unsold. It also distributed 6,030 complimentary tickets each for the semi-final and final matches of the Hockey India League on 21 and 22 February 2015, respectively.

It is now clear that Hockey India is badly mismanaged in all aspects, including fund management and the promotion of hockey to restore India's position as world champion. The Union Ministry of Sports should instead stop all financial grants to Hockey India because funds are being spent on payments to individuals or private companies in the form of legal fees and commissions rather than on promoting hockey in the country. Instead, a separate wing could be formed within the Union Ministry of Sports to promote hockey. It would spend money on legal fees and commissions according to norms set by the Union government rather than those decided by Hockey India's office-bearers.

On the other hand, central and state governments shower crores of rupees on cricketers, apart from the hefty annual salaries of up to Rs 7 crore per cricketer and the lifelong pensions paid by the BCCI after their retirement from cricket. The people of India are also responsible for such inequality when they prefer talking about and watching only cricket, resulting in India losing its world championship in hockey and remaining largely absent from the world's most popular game, football.

The central government should ensure that BCCI funds are utilised for public welfare schemes in the manner in which income from famous Hindu temples such as Tirupati is spent, rather than creating a super-rich category of people in a country with so much poverty and unemployment. It is good that Indian sports such as kho-kho are finally being promoted at the international level.

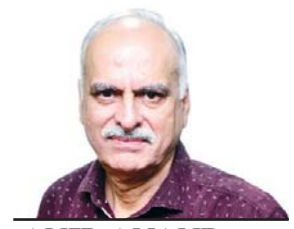
The Union government should also promote other Indian sports, especially those played in villages in earlier times, such as kabaddi, at the international level, giving rural youth opportunities to participate in international sports, as has rightly been done in wrestling.

Medals won by Indians at the Asian Games are often won by youngsters from extremely poor families, but they are soon forgotten by the government and the people of this country, much like Budhia, the five-year-old child who created a record in a 55-km race. Budhia is reportedly now in poor health due to malnutrition.

MEDALS WON BY INDIANS AT THE ASIAN GAMES ARE OFTEN WON BY YOUNGSTERS FROM EXTREMELY POOR FAMILIES, BUT THEY ARE SOON FORGOTTEN BY THE GOVERNMENT AND THE PEOPLE OF THIS COUNTRY, MUCH LIKE BUDHIA, THE FIVE-YEAR-OLD CHILD WHO CREATED A RECORD IN A 55-KM RACE. BUDHIA IS REPORTEDLY NOW IN POOR HEALTH DUE TO MALNUTRITION

The Writer is Guinness World Record Holder for writing most letters and RTI Consultant

J and K: From princely state to Union territory



ANIL ANAND

How different was the erstwhile state of Jammu and Kashmir (presently divided into two Union Territories) from the rest of the states? This is a vital question that has multiple answers, each of which is a separate topic of research and discussion. However, one glaring difference has been highlighted by the date October 26.

While the rest of the states and Union Territories celebrate their 'Foundation Day', Jammu and Kashmir celebrates it as 'Accession Day' — the day (October 26, 1947) when the pre-1947 ruler of the state decided to accede to India. It is not merely a term or description but a strong symbol encompassing the turbulent history of what was once the sprawling Himalayan state, which shared borders with four countries. The Partition of India in 1947 and the subsequent accession of Jammu and Kashmir to India changed the entire geographical map of the region.

October 26, 2026, marked the 79th 'Accession Day', which is widely celebrated nationwide and, of course, in the Union Territories of Jammu and Kashmir and Ladakh, which were once part of the same state. The state had the unique distinction of being a conglomerate of three diametrically opposite regions — Jammu, Kashmir and Ladakh - representing, in true terms, the oft-repeated dictum of 'Unity in Diversity' in the context of overall national diversity and unity. The regions differ in their geographical and geological features, religion, language, culture, etc. Still, they survived as a unit, notwithstanding some inherent differences, until August 5, 2019, when the Narendra Modi government introduced constitutional changes with far-reaching consequences. This resulted in the demotion and division of the historic state of Jammu and Kashmir into two Union Territories through the dilution of Article 370 of the Constitution. Yet 'Accession Day', despite losing its sheen, has not lost its relevance one bit, as it has become an umbilical cord connecting India and Jammu and Kashmir since its inception and to this day.

This is also because whatever has happened since October 26, 1947, including the developments of August 5, 2019, has its roots in 'Accession Day'. It paved the way for the erstwhile princely state of Jammu and Kashmir, ruled by the Maharaja, to join the Indian Union. India has consistently claimed Pakistan-occupied Kashmir (PoK) as its rightful territory, and a unanimous resolution was passed by Parliament in this regard in 1994. And rightly so. At the time, the then Maharaja of Jammu and Kashmir, Hari Singh, signed the Instrument of Accession with India for the entire territory of Jammu and Kashmir governed and controlled by him at that juncture. It was the subsequent Pakistan-engineered attack on the state through 'Kabailis' (tribals) in 1948 that led to this development. The attack took place against the backdrop of a 'Standstill Agreement' proposed by the Maharaja to both India and Pakistan on August 12, 1947. Under the agreement, the provision was to maintain existing administrative, communication and economic arrangements after British paramountcy lapsed. Pakistan readily accepted it, only to violate it immediately thereafter, whereas India refused to do so, which ultimately led to the signing of the 'Instrument of Accession'.



The then Prime Minister of Jammu and Kashmir, Janak Singh, sent identical telegrams to India and Pakistan, proposing that all pre-Partition arrangements, such as postal, telegraph and transport services, continue unchanged. The ostensible idea was to make Jammu and Kashmir a buffer state between India and Pakistan. Pakistan immediately accepted the proposal on August 15, 1947, and intimated by telegram that the services would continue. Its dubious design had started taking shape from here onwards. The arrangement with Pakistan collapsed after Pakistan imposed an economic blockade, going against the spirit of the 'Standstill Agreement'. Subsequently, it conceived and backed 'Operation Gulmarg', allowing tribal forces to invade Jammu and Kashmir in October 1947. The Pakistan-backed operation led to looting, plunder and the killing of innocent people across caste and religious lines, bringing immeasurable misery. Pakistan's backtracking on the 'Standstill Agreement' and its attempt to grab Kashmir by force left Maharaja Hari Singh with no option but to sign the 'Instrument of Accession' with India. The route to signing the agreement was not smooth, given the Maharaja's reservations and the Indian government's steadfast position that he first had to clarify his intentions in writing before New Delhi signed the agreement and sent the Indian Army to defend Kashmir. Finally, left with no choice as the marauding Pakistan-backed tribal forces had almost reached Srinagar, Maharaja Hari Singh came to terms with the situation. He signed the Instrument of Accession with India on October 26, 1947. And the rest, as they say, is history. It is another matter that Pakistan has, to this day, refused to recognise ground realities and has continued targeting Jammu and Kashmir through wars, both direct and proxy. The lone surviving witness to the events of that time and son of Maharaja Hari Singh, nonagenarian Dr Karan Singh, who was then the heir apparent of Jammu and Kashmir, aptly described the situation: "Death and destruction were fast approaching Srinagar; our smug world had collapsed around us...."

After the British left the Indian subcontinent on August 14, 1947, the princely state of Jammu and Kashmir remained independent for 73 days. Maharaja Hari Singh was already grappling with internal disturbances, with multiple uprisings against Dogra rule, most notably in 1924 and 1931. He also faced a formidable challenger in Sheikh Mohammed Abdullah of the National Conference, who became the symbol of the democratic struggle against the monarchy. The National Conference, earlier called the Muslim Conference, was influenced by the Reading Room Party of 1931, an anti-Dogra group of left-wing Muslim intellectuals from the Jammu region.

This was another backdrop to the events of 1947-48. Caught in the crossfire, Maharaja Hari Singh's indecision ultimately led to the signing of the Instrument of Accession with India, leaving him with no other option. Experts believe his preferred choice was to remain an independent principality. The 'Standstill Agreement' was ostensibly intended to secure recognition of Jammu and Kashmir's suzerainty by both India and Pakistan, with its borders extending towards China, Tibet, the then USSR and Afghanistan.

Pakistan had accepted the proposal immediately, only to violate the agreement months later. However, India did not do so and instead asked the Maharaja to send a representative to New Delhi for further discussions on the 'Standstill Agreement', which never materialised. 'Accession Day' is now an annual public holiday in the Union Territory of Jammu and Kashmir. It was officially declared an annual public holiday by the government in 2020, but only after the demand had acquired a controversial dimension, leading to protests and demonstrations. The then Lieutenant Governor's administration, overseen by the Union Home Ministry, took time to finally accept the demand. This followed considerable controversy and rancour generated by vested political interests seeking to foment communal and regional divisions.

The writer is political analyst

The missing institution in India's delimitation debate



MAHENDRA YADAV

Every democracy lives by two kinds of lines. There are the visible ones that separate constituencies on a map. And there are the invisible ones that determine who is allowed to draw them, under what rules, and with what claim to authority. India has spent decades arguing about the first. It has barely begun a serious conversation about the second.

The constitutional freeze on the inter-state allocation of Lok Sabha seats, which continues to anchor representation to the 1971 population base, has long outlived the demographic realities it was meant to stabilise. Differential rates of population growth across states have produced a growing divergence between the distribution of seats and the distribution of citizens. This is not a new observation. Scholars, political parties, and federal forums have examined the distributive consequences in considerable detail — the relative gains that would accrue to some states, the relative losses that would fall on others, and the possible formulas that might soften the impact. That debate is both legitimate and necessary.

What has received far less sustained attention is a prior institutional question: once any new formula is settled, who will translate it into actual constituency boundaries, under what constraints, and with what degree of continuity?

India's settled practice has been to create a Delimitation Commission by special statute, assign it a finite task, and dissolve it once the work is completed. This pattern has been repeated across successive exercises. Between commissions, the institutional capacity itself largely disappears — no standing secretariat, no accumulating body of reasoned decisions, no continuously refined methodology. Recent legislative efforts followed the same template rather than departing from it.

Although this is not a constitutional necessity, Article 82 leaves the authority and manner of readjustment to be determined by Parliament through ordinary law. In the Constituent Assembly, BR Ambedkar was clear that, while the Constitution laid down the underlying principles, the machinery for drawing constituencies was deliberately left flexible so that future legislatures could adapt it to changing circumstances. The recurring preference for temporary, single-purpose bodies is therefore a policy choice, not an inevitable feature of the constitutional design.

Temporary bodies have inherent limitations. They do not accumulate institutional memory. They do not refine methods across successive cycles. They do not leave behind a growing, citable archive of reasoned decisions against which later choices can be measured. Recent delimitation exercises have included public consultation and the publication of draft orders, which is to their credit. Yet, without standing numerical benchmarks and a continuing obligation to justify departures from them, the process remains less open to disciplined scrutiny than a body with institutional continuity would allow.



Other parliamentary democracies have made a different institutional bet. The United Kingdom's Boundary Commissions are permanent statutory bodies that review constituencies on a fixed cycle. Canadian commissions, though constituted after each census, operate under standing statutory rules that require published reasons when they deviate from strict population equality. Australia links redistribution to statutory triggers and defined thresholds of malapportionment. None of these arrangements has eliminated political conflict over boundaries. What they have done is treat the capacity to draw electoral lines as a continuing public function rather than an instrument assembled afresh under conditions of maximum political pressure.

There is a further difficulty of sequencing. To construct a permanent delimitation authority at the precise moment when the distribution of political power among states is being renegotiated is to build the institution inside the conflict it will later be asked to referee. Institutions created under acute distributive pressure often absorb the anxieties of that moment into their design. The risk is not merely technical; it is a risk to the long-run legitimacy of the body itself.

An alternative path is available that does not require the seat-share dispute to be resolved first. Parliament could, by ordinary legislation, establish a permanent technical delimitation authority whose initial mandate is limited to maintaining demographic data, developing and publishing methodology, and reporting to Parliament — without the power to alter any boundary. After the next census, that authority could conduct a fully transparent, non-binding technical exercise, placing its numbers and reasoning in the public domain for scrutiny. Only after the constitutional question of the freeze has been settled would its substantive powers be activated.

Such sequencing would keep the distributive decision where it belongs: in the realm of elected politics, argued openly. It would also ensure that the technical instrument already exists, tested and trusted, rather than being forged in the heat of the next contest.

The disagreement over relative seat shares among states is real and must be confronted directly. As Amitabh Kundu, Santosh Mehrotra and others have carefully shown, the delimitation question is not a simple contest between democracy and federalism. It concerns the appropriate balance between two legitimate objectives — electoral equality and territorial accommodation within a federal polity. Population should remain the dominant criterion, but it need not be the sole criterion. Institutional design does not dissolve that disagreement. What it offers is a steadier procedural framework within which the disagreement can be addressed.

The next delimitation, whenever it happens, will reshape the weight of citizenship and the balance among regions for a generation. The numbers on the map will matter. The authority we grant to those who draw the map may matter more — precisely because it is the part of the argument that receives least attention until it is too late to redesign.

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Foreign Hand

When governments face dissent, blaming outsiders can be more convenient than confronting the grievances at home. India's latest unrest has revived this familiar political reflex, with allegations of foreign interference being invoked to cast suspicion on protests demanding accountability from the authorities. RSS chief Mohan Bhagwat has warned of international conspiracies, while BJP leaders have accused the opposition of conspiring with foreign forces to destabilise the country. The Prime Minister, too, has portrayed political opponents as damaging India's interests. Yet allegations of a foreign-directed campaign require evidence of organisation, financing or operational control. Political associations, overseas travel and expressions of solidarity do not, by themselves, establish a conspiracy. Claims of an international network coordinating protests across several countries have added to the controversy. But connections between organisations, even when genuine, do not establish that they created or directed India's unrest. Allegations of foreign interference must be independently verified rather than accepted on the strength of political assertions.

None of this means foreign interference is imaginary. Governments, intelligence agencies, political organisations and online networks may exploit unrest beyond their borders. But exploitation is not authorship. The distinction is hardly new. Indira Gandhi invoked the foreign hand amid the political turmoil of the 1970s, when inflation, corruption allegations and popular discontent were challenging her government. The circumstances today are different, but the temptation to explain domestic opposition through external machinations remains recognisable. The danger lies in allowing suspicion of outsiders to displace scrutiny of the government itself. India's protesters have raised questions about educational opportunities, institutional accountability and electoral integrity. The allegations surrounding electoral-roll revisions remain contested, and they must be investigated through evidence and established procedures. They cannot be settled by questioning the patriotism of those demanding answers.

The events in Delhi on October 10 have added another dimension. Mass detentions, barricades, restrictions on movement and internet curbs became a story in their own right. Authorities may invoke public order to justify restrictions, but such measures cannot resolve the underlying disputes. In its heavy-handed clampdown on protesters, the Delhi Police may have supplied the most refined fuel to an already burning fire. Coercion can suppress an immediate demonstration while deepening resentment and providing a fresh focus for mobilisation. Nor should developments in Bangladesh, Nepal or Europe be treated as proof of a single international conspiracy. Countries with different political systems and histories can experience similar unrest because economic insecurity, distrust of institutions and frustration with political leadership are hardly confined by national borders. Movements may learn from one another without being directed by a common command. Pointing towards foreign hands doesn't explain India's discontent. Fires burn within. Outsiders may add fuel to a fire; they do not ignite it. A government confident in its institutions should back allegations of foreign interference with credible evidence while addressing domestic grievances openly. Dissent is not proof of disloyalty. Neither is every allegation of conspiracy proof of foreign intervention. A democracy must be able to distinguish between the two.

Energy Leverage

US Secretary of State Marco Rubio's visit to Jamnagar highlights an emerging reality in India-US relations: energy infrastructure has become a source of geopolitical influence. As Washington seeks to contain fuel-price pressures and diversify oil supplies, India's refining industry offers opportunities that extend beyond commercial transactions. The challenge for New Delhi is to convert this interest into lasting economic and strategic gains without compromising its national interests. Reliance Industries' Jamnagar complex, capable of processing about 1.4 million barrels of crude oil daily, occupies a distinctive position in global energy markets. Its ability to handle heavy crude, including Venezuelan grades, makes it a potential partner for the United States as Washington seeks to expand Venezuelan oil supplies and encourage greater purchases of American energy. With US midterm elections approaching, fuel prices carry immediate political significance for President Donald Trump's administration. For India, cooperation must serve national interests rather than Washington's geopolitical preferences. Russian oil became a major source of supply after the invasion of Ukraine disrupted global energy flows. Replacing it with American or Venezuelan crude makes sense only if the alternatives offer competitive prices, reliable supplies and comparable economic benefits. Washington's adjustments to restrictions on Venezuelan oil and temporary relief involving Russian petroleum products illustrate how domestic economic pressures can reshape foreign policy. This underscores the need for India to assess energy partnerships on their commercial merits rather than political expectations. The commercial opportunity also requires a realistic assessment. Processing more Venezuelan crude in India would not automatically lower fuel prices for American consumers. The outcome would depend on additional volumes, transport costs, refining margins and the destination of the finished products. Nor does Rubio's visit establish that Reliance has committed to specific purchases or exports. Potential cooperation must be distinguished from binding commercial agreements. The proposed Texas refinery presents a separate opportunity. Reliance's participation could deepen industrial ties and create a new avenue for investment, but any commitment should rest on commercial viability, regulatory certainty and expected returns. Diplomatic goodwill cannot substitute for a sound business case. Trade remains the larger test of the relationship. Cooperation on energy could help restore momentum to negotiations, but it will not resolve disagreements over tariffs, market access and preferential treatment. Indian exporters need predictable rules, while businesses on both sides require confidence that agreements will endure beyond immediate political pressures. New Delhi should approach the emerging partnership with clear priorities: diversify supplies, attract productive investment, protect affordable energy access and secure improved opportunities for Indian exports. These objectives are compatible with closer American engagement, provided the benefits are reciprocal. Jamnagar's significance lies in the industrial capacity that has made India relevant to Washington's calculations. Whether that leverage produces lasting benefits will depend on the terms negotiated in the months ahead. India's growing strategic importance creates room to bargain; disciplined diplomacy must ensure that the resulting gains extend beyond a single refinery or a temporary convergence of interests.

Morality beyond the pledge

The text of the integrity pledge text itself forces every citizen to concede that corruption remains deeply entrenched in our national fabric. The central public grievance portal records nearly a quarter of citizens dissatisfied with the mechanical disposal of their plaints. Countless elderly citizens wage silent, exhausting battles simply to live in peace and dignity, while many more swallow their grievances in resignation



In my earlier piece published in these columns, Between Heaven and the Street, I reflected on the quiet ordeal of an ordinary senior citizen fighting merely to secure a 100-foot neighbourhood stretch free from the menace of stray dogs within the framework of the Animal Birth Control Rules and judicial directives. In another reflection, Should a Senior Citizen Celebrate or Complain?, I wrote about the sheer disdain with which legitimate pleas for a peaceful, dignified existence are routinely met by civic authorities ~ where statutory obligations are brushed aside, and where senior police leadership, amidst grand public-relations campaigns, choose to block a complainant's communication rather than redress a grievance.

Now, the Central Vigilance Commission has announced the theme for Vigilance Awareness Week: "सत्यनिष्ठा से समृद्धि" ~ Probity for Prosperity. Though commemorated to mark the birth anniversary of Sardar Vallabhbhai Patel on 31 October, the campaign spans three long months, from 17 August to 16 November 2026.

A permanent fixture on the Commission's portal is an open invitation for citizens to take the "Integrity Pledge". I had taken the pledge years ago during the tenure of P. Daniel as Secretary, CVC. Visiting the portal again recently, where earlier attempts would display a prompt that the pledge had already been taken, I was allowed on 28 August 2026 to generate a fresh certificate ~ this time carrying my signature alongside the full text of the pledge, joining over two crore recorded citizens.

Yet, reading through those familiar tenets ~ to follow probity, to act in the public interest, to lead by example ~ provoked an unsettling question: out of the 2,02,30,632 pledges recorded, a vast majority belong to officials across police departments and civic bodies who proudly frame these certificates on office walls. But have these declarations genuinely transformed the everyday life of the common citizen?

As a resource person on service matters and as one trained under a collaborative initiative of the Department of Personnel and Training and the UNDP to facilitate sessions on ethics and values, I have always maintained that integrity cannot be instilled through routine paperwork.

Whenever invited to address senior officers on disciplinary proceedings and departmental inquiries at premier national institutions like the Sardar Vallabhbhai Patel National Police Academy ~ as recently as 2024 ~ I have consistently woven the vital ingredient of personal integrity into every session on rules. I remind them of Para 10.4(n) of the Vigilance Manual: preventive vigilance exists not to instil administrative dread, but to cultivate conscience and enhance managerial efficiency.

Sixty years ago, the historic Santhanam Committee presciently observed: "In the long run, the fight against corruption will succeed only to the extent to which a favourable social climate is created. When such a climate is created and corruption becomes abhorrent to the minds of the public and public servants... administrative and disciplinary measures may become unimportant."

Real integrity has never waited for a certificate. The people who truly shaped my moral universe never logged onto a portal:

1962: My father, supporting a household of nine on a meagre CPWD salary, never took an Integrity Pledge. When I was nine, I slipped away from a crowded stationery shop without paying for school notebooks, believing I had secured my "first earning". My father did not strike or shout; he firmly ordered me back to the shop to return the money. The elderly Sikh shopkeeper wept, handing me two biscuits as a reward for honesty. That quiet correction anchored my conscience for life.

1984: A Class IV employee, whom I had transferred from my section for overstepping official boundaries, bore no malice. Though a private moneylender of means, when the Planning Commission Thrift and Credit Society faced an acute fund deficit, he voluntarily deposited Rs. 35,000 from his personal savings solely to protect my institutional standing as Secretary. I still recall his words with moist eyes: "Chugh Sahib, Chaudhary ke hote Chugh Sahib par aanch nahin aane doonga."



KRISHAN KUMAR CHUGH

The writer is a retired Director and a practicing Advocate

2013: While overseeing administrative affairs of a premier national training institution, we discovered faculty drawing double the permissible training allowance. Supported by our Joint Secretary, Mr Alok Kumar (who later retired as Chief Secretary of Assam), we halted the irregular withdrawals. Though the decision stood unchallenged and saved public funds, I became an outcast to that institution ~ never invited again ~ even as premier national academies continued to seek my sessions.

2024: On a crowded railway platform in Patna, an unknown passenger noticed my distress, guided me into the coach, and unconditionally surrendered his seat for a three-hour journey to Gaya. He sought neither compensation nor recognition, leaving behind a lasting bond of friendship and a lesson in unprompted human decency.

2026: During a recent visit to Hyderabad (18 to 21 September 2026), my wife inadvertently left her handbag ~ containing cash, cards, and her mobile phone ~ at the Ganesh Butterfly Hotel. Srivelli, the steward, noticed the forgotten bag, traced our son's number from the phone, and kept the belongings safely in her personal custody until they could be collected the next day. When offered a monetary token of appreciation, she politely declined.

October brings a calendar rich with solemn observances: the International Day for Older Persons on 1 October, the birth anniversaries of Mahatma Gandhi and Lal Bahadur Shastri on 2 October, the anniversary of the Right to Information Act on 12 October, and the culmination of the vigilance campaign on Sardar Patel's birth anniversary on 31 October. While Bapu is remembered for refusing to preach what he did not first practice, millions will take oaths in the name of the Iron Man of India.

High-level seminars will be attended by top brass, glossy souvenirs will be released, and the sacrifice of martyrs like young Satyendra Dubey ~ which led to the PIDPI Resolution ~ will be formally invoked. The RTI Act will be hailed as a pillar of transparency.

Yet, the irony remains stark. The portal's pledge text itself forces every citizen to concede that corruption remains deeply entrenched in our national fabric. The central public grievance portal, CPGRAMS, records nearly a quarter of citizens dissatisfied with the mechanical disposal of their plaints. Countless elderly citizens wage silent, exhausting battles simply to live in peace and dignity, while many more swallow their grievances in resignation.

When Sardar Patel addressed the first batch of Indian Administrative Service officers, he reminded them: "You are the pioneers in the Indian Service, and the future of this service will depend much upon the foundation and traditions that will be laid down by you, by your character and abilities and by your spirit of service."

True character does not need the crutch of a digital oath. If we wish to offer genuine homage to Sardar Patel, we must remember that an authentic SARDAR is defined by Sincere Action Required for Doing Authentic Rectitude.

My father, Chaudhary Sahib, the young traveller on the Patna platform, and the conscientious hotel manager in Hyderabad are the real Sardars of our times ~ living testimonies to unpledged integrity.

As this season of anniversaries and commemorative pledges rolls in, one can only hope that our public servants and civic guardians move beyond self-congratulatory posters, look within, and learn from those who lead quietly by example.

The ultimate measure of governance is not how many pledges we log, but whether the vulnerable, the elderly, and the common citizen can truly live with dignity and trust in the system.

Việt Nam News

European media hail substantive Viet Nam-EU ties

Major European news outlets have hailed the outcomes of the talks of General Secretary of the Communist Party of Viet Nam Central Committee and President Tô Lâm with President of the European Council Antonio Costa and President of the European Commission Ursula von der Leyen in Brussels as a major step forward for Viet Nam-EU ties, which were upgraded to a Comprehensive Strategic Partnership in January this year. International media focused on the joint press release, which pointed to concrete progress in several areas.

First, the two sides agreed to deepen cooperation in trade, investment and strategic raw materials, calling for full delivery of the EU-Vietnam Free Trade Agreement (EVFTA) and swift ratification of the EU-Vietnam Investment Protection Agreement (EVIPA). CEO Magazyn Polska reported that both sides named strategic raw materials, innovation and new technologies as priorities.

Viet Nam holds important mineral resources used in batteries, electronic equipment and energy infrastructure, and closer cooperation could help the EU diversify its supply chains, though the Brussels statement announced no specific new mining contracts.

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Business news platforms, including The Europe Today and IEU Monitoring, zeroed in on the key economic aspects, including efforts to deliver on the EVFTA, accelerate EVIPA ratification, and cooperate in energy, critical raw materials, technology and commitments under the Just Energy Transition Partnership (JETP).

Specialist media also highlighted Viet Nam's role, noting that EU officials, including High Representative for Foreign Affairs and Security Policy Kaja Kallas, see it as a priority partner in the Indo-Pacific.

Second, the two sides agreed to broaden cross-sectoral cooperation, tightening links in technology, innovation, education, strategic infrastructure and green transition.

Observers noted that Viet Nam supplies the European market with electronic and electrical products, apparel and footwear, while European companies sell machinery, chemicals, transport equipment and other industrial goods to Viet Nam.

Stronger investor protection could support manufacturing and infrastructure projects. Anadolu said Viet Nam needs stable energy supplies to sustain its expanding export-oriented industries, opening potential opportunities for European equipment suppliers, infrastructure developers and financiers.

Third, the two sides reaffirmed their commitment to security cooperation and green transition. They confirmed plans to boost investment through the Global Gateway initiative and the JETP.

PERSONAL

WISHING all devotees of St. Jude a very Happy Feast day. — DS.

Letters To The Editor | editor@thestatesman.com

Confused

Sir, Marco Rubio, the US Secretary of State has most graciously descended in India. Here, he assures that the Indo-US trade deal is almost finalised, just some words and phrases to be corrected. He clarifies that the imposition of tariffs and the visa changes are not against India.

He, of course, does not bring up the matter of the dumping of 104 shackled Indians in Amritsar. Mr Rubio shares a message from President Trump that America considers India a dependable friend and a valued trade partner.

We feel highly flattered by Trump's eccentric friendship for India. However, just adjacent to this uplifting news is the warning by RSS chief Mohan Bhagwat on the protests by GenZ against the collapse of the education system and that of political parties against Gyanesh Kumar, CEC and SIR conducted fraudulently. He cautions that the 'regime change' demand is to dismember the country. He likens it with protests going on in Albania, France, Bangladesh and Nepal and calls it the "storm from the West".

We are very confused. Is this agent from the West here to clandestinely foment disturbance in the country?

Yours, etc., Anil Bagarka,
Mumbai, 21 October.

Rubio's visit

Sir, I refer to "Rubio backs India, calls UN experts an Oxymoron". US Secretary of State Marco Rubio met External Affairs Minister S. Jaishankar in Mumbai and held discussions on trade, energy, defence, technology, and people-to-people ties. He also met leaders of Tata, Adani, and Reliance groups, before touring Reliance's Jamnagar refinery complex.

The itinerary conveyed that Washington sees India not merely as a diplomatic partner but as a commercial and energy-security partner.

By engaging directly with Indian business groups, the US administration highlighted investment, technology access, and energy trade as the operational pillars of the relationship.

Rubio's visit to India is taking place at a crucial time, when uncertainty over tariffs, differences over Russia's war in Ukraine, and challenges related to energy policy and immigration have left India-U.S. relations in need of reassurance.

Although it may improve the immediate atmosphere and facilitate a trade agreement, it does not resolve the fundamental issues of tariff uncertainty, dependence on Russian oil, immigration restrictions, and differing strategies toward Pakistan. India should seek cooperation while maintaining its strategic autonomy, especially in matters of energy and agriculture.

Yours, etc., Bal Govind, Noida, 22 October.

Teach English

Sir, Apropos "Is English foreign to us?", the rationale behind enrolment in English-medium schools is the necessity of English as the medium of instruction in all subjects. This is the first stepping-stone on the path to success in advanced studies.

West Bengal's vernacular schools dispensed with English at the primary level during the Left Front regime which was detrimental to the students. It is praiseworthy that the present BJP regime of our state is committed to ensure academic performance of students from Class 1 to 12 in government schools of West Bengal. Their academic performance in each of the classes needs to lay emphasis on studies in English language.

Yours, etc., Anindya Ghosal,
Burdwan, 26 October.

Mortgaging our intellectual future

RAMAKRUSHNA BARAL
AND NEERAJ KUMAR

Nothing could be more damaging to a growing department than to neglect its library or to give it a low priority." The Kothari Commission recognised libraries as intellectual engines of higher education. Over half a century later, its warning remains pertinent. At the 2023 Festival of Libraries, President Droupadi Murmu described libraries as bridges between civilisations and recalled the loss of Nalanda's collections. She urged that libraries serve as the "drawing room and study" of the community.

Although India promotes a digital knowledge economy and Indian Knowledge Systems (IKS), the infrastructure for preserving and democratising knowledge remains uneven and under-resourced. A knowledge economy requires libraries, archives, reading rooms, and trained professionals alongside bandwidth and subscriptions.

The emphasis on IKS under the National Education Policy 2020 offers an opportunity to connect traditional knowledge with contemporary education. However, this depends on preserving primary sources. India's manuscripts, recorded on palm leaves, birch bark, handmade paper, and copper plates, document its intellectual, scientific, linguistic, and cultural traditions.

The National Mission for Manuscripts, established in 2003, was subsequently restructured under the Gyan Bharatam Mission. By 2026, over eight lakh manuscripts had been digitised, while the National Manuscript Survey had identified more than 1.19 crore. This gap demonstrates the work remaining. The government has committed substantial resources to surveying, conserving, and digitising manuscripts, but the scale remains vast.

Digitisation alone does not ensure preservation. Manuscripts face humidity, fungal and insect damage, inadequate conservation infrastructure, and illicit transfer. Digital collections also require effective discovery, interpretation, and access. Conservation laboratories, trained specialists, cataloguers, metadata experts, and reading rooms remain essential. India cannot advance IKS while neglecting its physical repositories.

The One Nation One Subscription (ONOS) scheme demonstrates India's capacity to prioritise knowledge access. With Rs 6,000 crore allocated for 2025-27, it offers approximately 13,000 scholarly journals across more than 6,300 government higher-education and central research institutions, potentially benefiting nearly 1.8 crore students, faculty, and researchers.

However, ONOS addresses access to scholarly literature, rather than the condition of public libraries, archives, manuscript repositories, and community reading spaces. Independent researchers, rural students, and ordinary citizens may still depend on under-resourced district or municipal libraries. Digital access and physical infrastructure are complementary priorities. A university student may access thousands of journals while others continue to rely on poorly equipped local collections.

A 2024 study in the American Economic Journal: Economic Policy found that investment in U.S. public libraries increased visits, children's programme participation, and circulation of children's materials, alongside improvements in reading-test outcomes.

In India, public-library expenditure and infrastructure lack visibility in fiscal planning. Dependence on competing state and local priorities produces uneven provision: some libraries have modern catalogues and reading rooms, while others face inadequate buildings, outdated collections, and staff shortages.

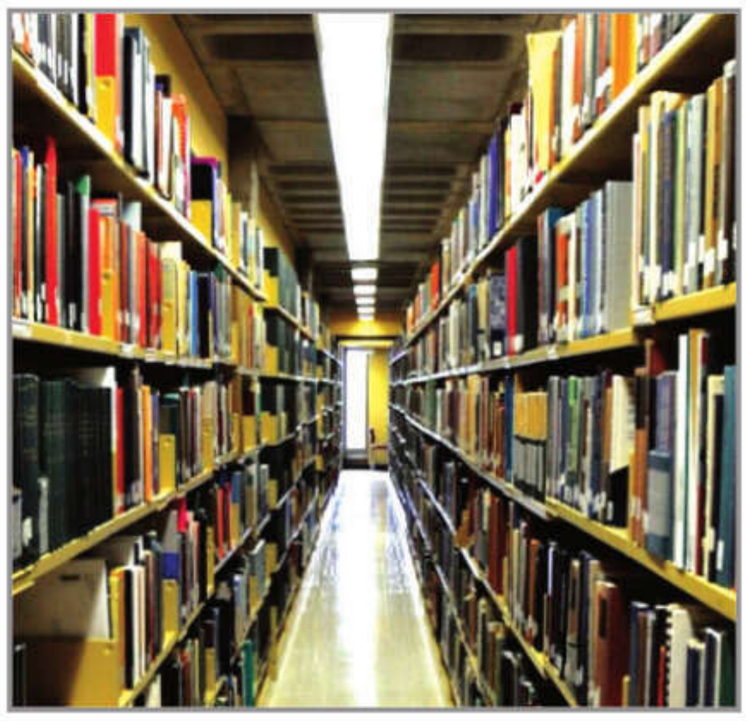
Public libraries primarily fall under the State List. According to the Ministry of Culture, 19 states have enacted public-library legislation, leaving nine states without dedicated statutes. Without statutory frameworks, funding remains vulnerable to administrative priorities. Despite Baroda's pioneering library movement under Maharaja Sayajirao Gaekwad III and Ranganathan's advocacy, support remains inconsistent.

Even earmarked funding faces difficulties. Tamil Nadu levies a library cess of 10 paise per rupee on property tax, but State Finance Commission records document delayed transfers and outstanding dues. The Delivery of Books and Newspapers (Public Libraries) Act, 1954, requires publishers to deposit publications with designated libraries. Yet fines of up to Rs 50, alongside publication value in relevant cases, are outdated. Legal deposit must reflect contemporary publishing, including digital publications and institutional output.

The problem is not a shortage of recommendations. The Kothari Commission recommended allocating approximately 6.5 to 10 per cent of university budgets to libraries, depending on their developmental stage. The National Mission on Libraries, inaugurated in 2014 with Rs 400 crore during the 12th Plan, included a virtual library, model libraries, utilisation surveys, and capacity building. It targeted 35 State Central Libraries, 35 District Libraries, six Ministry of Culture libraries, and connectivity for 629 district libraries.

Implementation has been uneven. Parliamentary data from late 2023 showed Rs 77.10 crore sanctioned for Model Library initiatives, but only Rs 35.59 crore disbursed. Announcements require sustained implementation and timely funding. The 2011 Census recorded 70,817 rural and 4,580 urban libraries, but counts reveal little about functionality, staffing, automation, or service quality. The central concern is therefore their condition and capacity, rather than their number alone.

Libraries also face a crisis of professional recognition. Librarians are often treated as custodians of collections and circulation records rather than providers of intellectual and digital services. They can guide users through databases, open-access



repositories, and discovery systems; support conservation and metadata creation; and help students assess sources, recognise misinformation, and use scholarly tools responsibly.

Public librarians can develop civic spaces offering discussions, workshops, cultural programmes, competitive-examination support, and accessible services. However, temporary employment, inadequate professional development, and insufficient recognition undermine the recruitment and retention of expertise. Such services can particularly assist first-generation learners. Renewal requires investment in people alongside infrastructure.

India needs sustained institutional commitment. First, states without public-library legislation should establish statutory frameworks with predictable, transparent funding rather than relying solely on discretionary annual allocations. Second, the Delivery of Books and Newspapers Act should address digital publishing, institutional publications, and contemporary enforcement. IKS funding should support physical conservation alongside digitisation.

Third, ONOS should be complemented by investment in district and municipal libraries: safe buildings, reliable electricity, internet, accessible facilities, updated collections, and modern catalogues. Librarians must be integral to this infrastructure. A society that starves its libraries mortgages its intellectual future. ONOS demonstrates the resources and administrative capacity available when knowledge access becomes a national priority. The same resolve must extend to physical repositories. A republic cannot celebrate Nalanda while allowing living archives to decay. An inclusive knowledge economy must invest in both the networks delivering knowledge and the libraries preserving it. Its intellectual heritage must remain available for all future generations.

The writers are, respectively, from the Department of Library and Information Science, University of Madras, and Assistant Professor, CHRIST (deemed to be university), Bengaluru.

Climate change and livelihood diversification

ARUP MITRA

The relationship between climate change, livelihood diversification and wellbeing levels are important. Research shows that households with diversified livelihoods are less vulnerable to climate change impacts. Strategies which help diversify agricultural practices and explore additional sources of income, usually increase household wealth and well-being.

Rural communities facing climate change impacts on agriculture and food security have implemented adaptation strategies by growing drought-tolerant crops, using water harvesting techniques and raising domesticated animals with a view to pursuing livestock farming. The climate change effects threaten traditional livelihoods and rural populations' well-being. By understanding these dynamics the sustainable development policies that enhance resilience can be developed.

The occupational diversification has been observed as a vital strategy to cope with crisis and seasonal stress in both farm and non-farm activities. Those dependent on livelihood sources that are impacted by seasonal factors are vulnerable to climate change effects and they are the ones who are likely to adopt these tactics of occupational diversification.

However, broadly speaking occupational changes can be divided into two types. One which includes distress-led moves and the other explores various productive measures. The former is not innovative - in a desperate attempt households pick up several marginal activities. However, these attempts do not bear any certainty about arresting the income losses.

On the other hand, good understanding and perception of the climate change phenomenon offers insights to diversify and pursue productive activities that augment incomes. So what determines perception is a key question: in other words, why one individual is successful and another not is an important issue. In this context the role of government becomes instrumental in providing requisite knowledge and guidance about climate change and its effects.

Based on our study in Odisha (study sponsored by ICSSR on Climate Change, Livelihood Diversification and Wellbeing by A. Mitra, S. Das, A. Tripathi, T. Sarangi and Thiagu Ranganathan, published as Springer Brief, 2021), we analysed the inter-temporal data on consumption and looked at the possibility of upward mobility and the factors influencing mobility. This is related to the climate change effect and the effectiveness of the strategy to cope with the phenomenon.

Diversification adopted in the face of compulsion and in a situation of stagnancy without many prospects may result in a bunch of residual or low productivity activities whereas diversification as an attempt to explore newer pathways in a vibrant situation to reduce income risks and smooth consumption can be highly beneficial. Consumption changes perceived as a prerequisite of wellbeing change seem to be responsive to the individual efforts pursued through income augmenting/smoothing strategies which might have been perceived through livelihood diversification. Instead of remaining idle in the slack seasons the households seem to have explored other avenues of earning.

Though the livelihood diversification as an independent factor does not turn out to be significant as such, its effect is captured through the income variable. The responses tend to vary across religious and caste categories. Better-off households perceived through housing conditions seem to respond better compared to households with poor living conditions. Large households are more likely to adopt consumption augmenting strategies as for them the compulsions could be alarming and adoption might have been easier: as some members could be deputed to the marginal activities, the head can be more selective in picking up gainful opportunities. Land ownership does not turn out to be significant possibly because many of the sample households

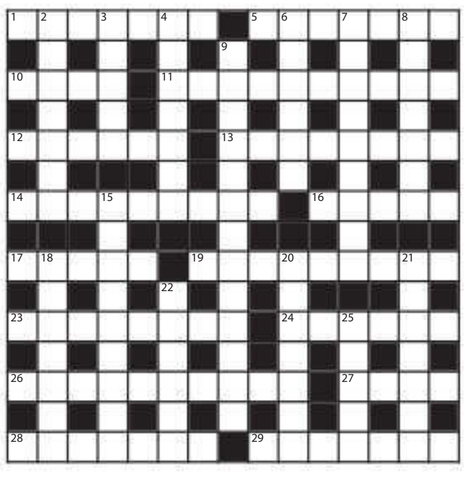


do not actually own land to any sizable extent.

The findings have important policy implications in terms of employment generation and income support programmes and also setting up effective strategies to disseminate information on climate change and its effects. The geographical diversity even within a given state involves plurality in understanding the situation and dealing with its complex and varied effects across space.

The writer is Visiting Professor, Faculty of Economics, South Asian University, New Delhi.

Crossword | No. 293619



Yesterday's Solution



ACROSS

1 Shark tail is seen within banks of Forth (7)
5 Bear's paunch (7)
10 Hands university a list of courses (4)
11 Game monarch hosting cool queen's band at dinner (6,4)
12 What workers collect almost swamps court (6)
13 Sexy Mike's not into improvised soul music (8)
14 Begin introducing a medic at Yankee pre-match bash (4,5)
16 Story involving very rare organ (5)
17 Throw away unfinished jam (5)
19 Girl and boy return clasping new spring flower (9)
23 Meat loaf half eaten during flight (8)
24 Police officer gets bad review (6)
26 What's spread before spread? (5,5)
27 Like some cakes brought in twice daily (4)
28 Red Cross tails vehicle heading off in fog (7)
29 Cereal producer's large diary kept in barrel (7)

DOWN

2 Binge before opening oxygen tank (7)
3 Paper covers nearly bankrupt seed repository (5)
4 Performed tune backwards for drink (7)
6 Long time associated with a YBA (6)
7 Die from it, shattered and humiliated (9)
8 Tot tucked into ice cream that's put away (7)
9 Reveal how to clumsily pod legumes? (5,3,5)
15 Greek cross about notice left in a V&A fish dish (9)
18 Root fool dunked in wine (7)
20 Firm to eat and drink to get over depression (2,5)
21 Gents arranged to hide, say, savings (4,3)
22 Officer is swigging superior sauce (6)
25 Cook fish maybe in Gulf Stream (5)

NOTE: Figures in parentheses denote the number of letters in the words required. (By arrangement with **The Independent, London**)

100 Years Ago



Front page of The Statesman dated 28 October 1926

OCCASIONAL NOTE

Two heavy blows have been struck at Oxford this week. The Vice-Chancellor has forbidden street-loitering, presiding at open-air meetings, visiting hotel bars without permission—a pleasant touch—the hiring of a motor car for more than an hour, and various other recognized undergraduate amusements. He appears to have overlooked football, cricket, and the collecting of cigarette cards. But he has dared to lay down a rule of dress for women students. They may wear white blouses, but must wear subfusc coats and skirts, and also black stockings—almost the last word in tyranny, with fashions as they are. The memorandum carefully adds that they must wear boots or shoes. The other attack came from Mr. Morris, the eminent motor car producer, who has pronounced university men to be useless for business. Not only does the university not confer the qualities essential to success, but it obliterates them when conferred by nature. The reference is to univer- sites in general, but presumably the Cowley industrialist had his eye on the local product. It will depress heads of colleges to know that their efforts can produce nothing better than bishops and statesmen and judges and poets, but they may be comforted by the memory that Mr. Selfridge, who sells more than one kind-of article, has begun to find university men of value in his business.

News Items

FIGHT TO A FINISH

COMMONWEALTH & FOREIGN OIL COMPANIES

SYDNEY, OCT.

OPENING the Country Press Conference, Mr. Page, Treasurer of the Commonwealth, said that the foreign oil companies had not only bled the country white, but were attempting to lay down how the country should progress. The Federal Government was prepared to fight them to a finish.

Foreign oil companies' levies greatly handicapped the progress of road locomotion in Australia and the Federal Government was determined that this should not be allowed to continue indefinitely. The Commonwealth oil refineries formed for the purpose of making Australia independent in times of emergency would soon demonstrate the exorbitance of importers' prices.—Reuter's Special Service.

BUYERS AND JOBBERS

RECOMMENDATION OF THE FOOD COUNCIL

LONDON, OCT.

IN the House of Commons, replying to questions, Sir Phillip Cunliffe-Lister stated that the Government had communicated to the Tea Brokers' and Jobbers' Association the recommendation of the Food Council that the Association should prohibit its members from acting simultaneously as buyers and jobbers.

The Association had replied that the matter was receiving attention.— Reuter's Special Service.

COAL DISPUTE

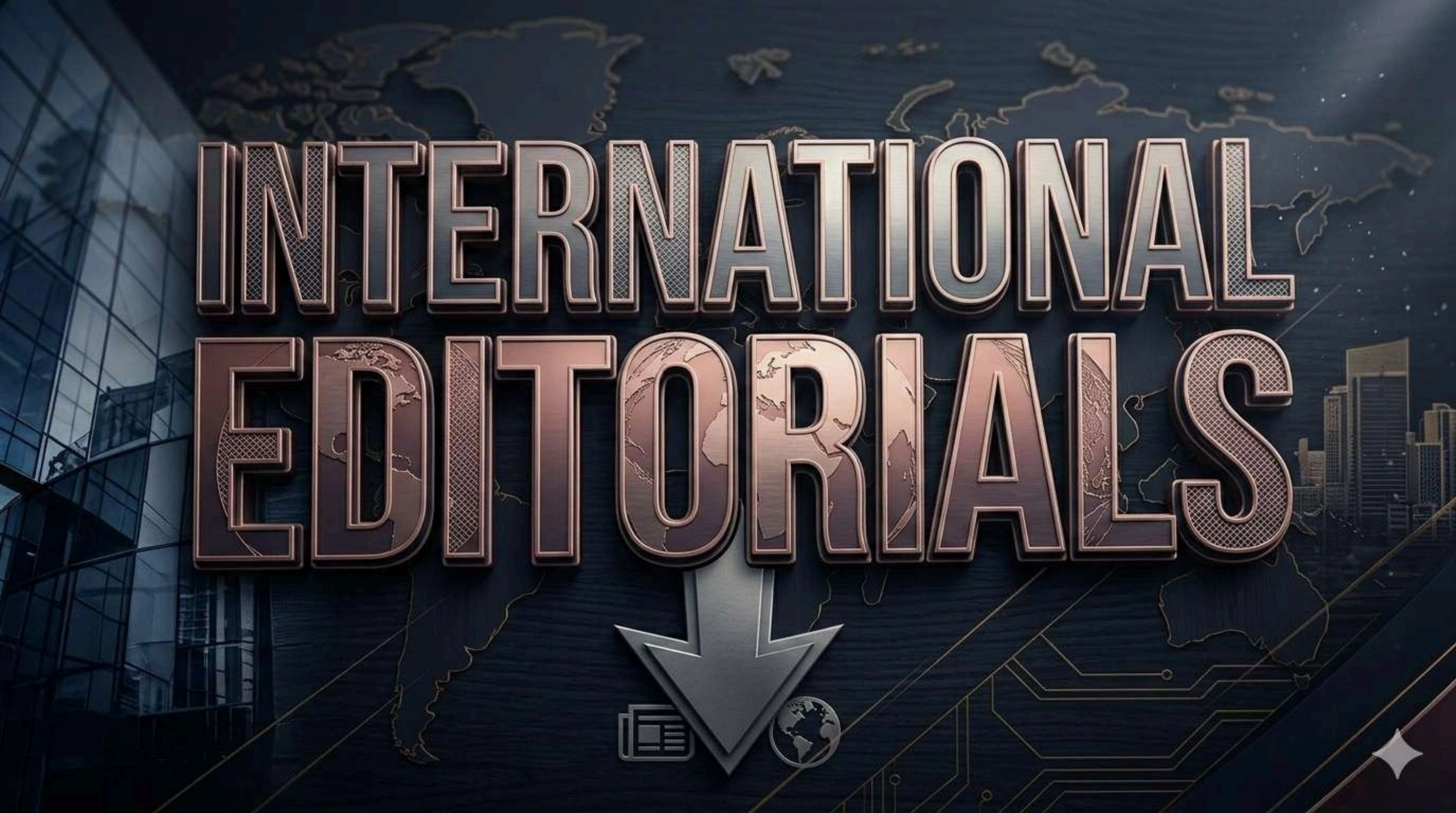
EFFORT TO RE-OPEN NEGOTIATIONS

The Prime Minister, accompanied by the Chancellor of the Exchequer and the Minister of Mines, met representatives of the Trades Union Congress in the Premier's room in the House of Commons on Tuesday evening at the latter's request, and discussed the coal situation.

Proceedings were secret, says Reuter, but it is believed that the Congress leaders requested the summoning of the coalowners' and miners' representatives. Mr. Baldwin replied that Government inter-vention was useless while the present attitude was persisted in.

In addition to the meeting between the Trades Union delegates and the Cabinet Ministers it is understood that a peace move has been initiated by several prominent men, notably Lord Derby and the Marquess of Londonderry.

There was a sudden development yesterday, and Mr. A. J. Cook has been summoned from Walsall to London to meet the Trades Union Council. The summoning of Mr. Cook to London in a sequel to the decision of the Council to ask the Executive of the Miners' Federation to meet them as soon as possible to discuss the reopening of negotiations.


INTERNATIONAL
EDITORIALS

The FT View



FINANCIAL TIMES
'Without fear and without favour'

ft.com/opinion

Lula's stunning comeback meets fiscal reality

Brazil's president must now rein in spending and build a broad coalition

Luiz Inácio Lula da Silva's supporters partied late into Sunday night on Avenida Paulista in São Paulo after a stunning comeback in Brazil's presidential election run-off secured the veteran leftwing leader a fourth non-consecutive term, just two days before his 81st birthday.

But the country's financial markets began the working week in an extremely ill temper. At one stage yesterday the stock market was down 17 per cent, prompting a temporary halt in trading, while the real tumbled by around 10 per cent against the dollar. It was a harsh wake-up call about the economic realities Lula now faces.

Even before the election campaign, Brazil's public finances were starting to look shaky. Over the course of Lula's third term beginning in January 2023, public debt has risen more than 10 percentage points to over 82 per cent of GDP as the government sought to drive faster growth through higher public spending. The budget deficit is expected to be 8 per cent of GDP this year. Real interest rates are elevated, pushing up debt-servicing costs and swelling the deficit. In the view of many investors, the current debt dynamics are unsustainable.

Bond investors have also been unnerved by an election campaign which saw Lula and his hard-right challenger Flavio Bolsonaro fall over themselves to offer handouts to voters — from free public transport at the weekend from Lula to a debt holiday for consumers from Bolsonaro.

The market reaction is a warning for Lula of what could be in store. He needs to rein in public spending or his hand could be forced by investors increasingly reluctant to fund his government. Lula should start by changing his rhetoric. During the campaign he said that it was "*babaquice*" or foolishness to talk about fiscal tightening. He will not want to abandon all his campaign pledges without facing claims of betrayal, but he needs to articulate that he understands the precariousness of the fiscal situation.

With the finance ministry currently run by an interim appointment, Lula will have to nominate a new minister who has credibility with business and markets. This does not necessarily mean the appointment of a prominent banker but it does mean the finance ministry is not the place to test out one of the rising stars within Lula's Workers' Party who are being groomed as potential successors.

Lula should also build as broad a coalition as possible within Congress to ensure he can govern effectively. Right-wing parties swept the congressional elections three weeks ago and the large group of Bolsonaro loyalists will be desperate to exact political revenge after Sunday's humiliating result. The electoral process itself was marred by controversy after a Supreme Court justice — who was formerly Lula's personal lawyer — ordered a two-hour extension of voting, following complaints with public transport.

> If he can forge a credible plan to stabilise the debt-to-GDP ratio, it could create the conditions for interest rates to fall

When Lula defeated Jair Bolsonaro four years ago, he constructed a coalition that stretched from left to centre-right in order to take on the hard right — only to cold-shoulder some of his new allies once in office. He will now have to recreate that more ecumenical spirit.

If Lula can forge a credible plan to stabilise the debt-to-GDP ratio, he could create the conditions for interest rates to fall, which would give him some wriggle room in the budget during the rest of his mandate. If he fails to take action now, he risks spending his fourth term buffeted between financial markets that have little confidence in him and a Congress that is downright hostile. That would be a dispiriting outcome after a remarkable victory.

Opinion Technology

What does human inquiry even mean anymore?

Ewan White



Nicholas Dirks

A passage from the French philosopher Michel Foucault's book *The Order of Things* keeps resurfacing in discussions of artificial intelligence, and with good reason. "Man," Foucault wrote, "is an invention of recent date. And one perhaps nearing its end." His claim was not that human beings might vanish, but that "man" — the modern figure of the sovereign knowing subject at the centre of the production of knowledge — is a fragile historical construction. Foucault died decades before the advent of generative AI, but his prophecy no longer sounds preposterous.

When machine systems can occupy some of the functions previously reserved for "man" as knowing subject — generating text, making inferences, producing outputs that look like the product of human understanding — something like the displacement Foucault anticipated becomes newly plausible.

> Many of our institutions have shown weaknesses which the AI knowledge economy will exacerbate

Alan Turing anticipated this in 1950. He predicted that "at the end of the century the use of words and general educated opinion will have altered so much that one will be able to speak of machines thinking without expecting to be contradicted". The following year he put things more starkly: "If a machine can think, it might think more intelligently than we do, and then where should we be?" In an unpublished paper from the same period he went further still, warning that "at some stage therefore we should have to expect the machines to take control".

Ideas of the human have never been fixed, of course. They have shifted before in response both to religious and theological upheaval and to scientific and technological discovery. Copernicus shifted our understanding of the Earth's centrality in the universe, while Charles Darwin revolutionised our sense of humans' place in relation to the animal kingdom. And today, whatever we think of predictions about the coming of the "singularity" or "artificial general intelligence", we broadly accept that the categories that organise knowledge do not last for ever and that current understandings of what is "human" will be no exception.

AI is not just a technological challenge; nor is it a mere philosophical puzzle. It is a major wake-up call for our universities and other knowledge-based institutions. Such institutions embed assumptions — about human values, the sources and limits of expertise, the proper relationship between society, government and knowledge. When assumptions about who or what creates, controls and uses knowledge begin to shift, the institutions built upon them come under growing pressure to shift as well.

Like Frankenstein's monster, AI has moved from the laboratory into everyday life. AI systems now influence the information we consume, the social relationships we form, the cultural activities we pursue, the jobs we perform, the medical diagnoses we receive, the education we are offered and the scientific discoveries and policy recommendations that shape our future. Emerging technologies such as quantum computing, synthetic biology, advanced robotics and blockchain systems are likely to accelerate these transformative effects.

While many scientists are excited by the possibility of unprecedented scientific breakthroughs, others are concerned not just about the impact of AI on scientific procedures, but about the "black box" nature of new modes of computational reasoning. What happens when new discoveries are based on machine intelligence rather than human understanding, which may become increasingly outpaced by AI?

And what about other institutions of knowledge? How will the ubiquitous availability of powerful AI models affect classroom teaching, student learning and assessment, the development of critical thinking, writing and reading as well as statistical and mathematical skills, not to mention the role of faculty and the value of scholarship? Will universities, research centres and think-tanks survive intact?

Many of our institutions have already shown weaknesses and vulnerabilities which the new knowledge economy of AI will only exacerbate. It is time to rethink, and in some cases redesign, them. Machines will only become more intelligent. They will find new ways to outwit humans, and to hide from us how they seek to attain their goals and arrive at their conclusions. Humans, however, still have the capacity to set those goals, and to establish the criteria by which we measure success, for machines as well as ourselves. To do so we'll need to find the resolve to sit for the exam rather than either hack the answers or put our heads in the sand.

The writer is the president of The New York Academy of Sciences and former chancellor of UC Berkeley

Letters

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Don't blame midterms for defence stock underperformance

Your report "US defence sector shares tumble as investors bet on Democratic sweep in midterm elections" (October 20) rests on two lines moving together. I have tested whether they move together day by day, and they do not.

Across 201 trading days this year, daily changes in Kalshi's odds of a Democratic Senate show no measurable link with the returns of the iShares aerospace and defence exchange traded fund, once the S&P 500 and long-dated Treasuries are controlled for. For Lockheed Martin, Northrop Grumman, General Dynamics and RTX the estimated effect even has the wrong sign.

The timing is also awkward for the story. Between August 18 and September 11 those four groups fell 10 per cent relative to the market while the Democratic odds barely moved. When the odds then jumped 16 points in the second half of September, the shares fell only a further 2 per cent. European defence stocks dropped 16 per cent relative to their own market over the same weeks, which no midterm can explain.

Much of the ETF's underperformance is not defence at all. Roughly two-fifths of the fund is civil aerospace. GE Aerospace, Boeing, TransDigm and Howmet Aerospace account for almost nine of its 16 percentage points of underperformance this year, while the four large defence groups have broadly kept pace with the market.

Investors are repricing something, but it looks more like budget execution, interest rates and civil aviation than a bet on November.

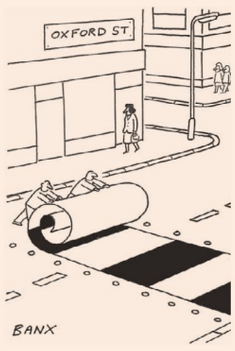
Jakob van Geest
PhD Candidate in Defence Economics, Faculty of Military Sciences, Netherlands Defence Academy, Breda, The Netherlands

How Europe can compete with dollar stablecoins

I'm thankful to Martin Sandbu for engaging with my essay ("Autonomy is at the heart of Europe's underrated digital trailblazing", Free Lunch, October 23).

Let me say where I agree with him. Europe's two-tier monetary system is biased towards banks, and stablecoin regulation shows it: under the Markets in Crypto-Assets Regulation (MiCA), issuers of euro tokens must hold a large share of their reserves as deposits in the banks they compete with, rather than in central bank money. That is the first thing to fix.

But I do not think the remedy is a single tier. A second tier is a privilege only if entry to it is closed. If access to central bank money is decided by function rather than legal form, any supervised firm that performs the function is admitted. That is regulation of an activity, not a privileged class. What is wrong with today's system is that the boundary is closed, not that it exists. Nor would a single tier deliver the autonomy you want. European banks comply with US sanctions because they need dollars and the US market, not because they intermediate central bank money. A fintech with American business, or an exporter holding digital euros directly, would face the same choice. Instex, Europe's public channel for trade with Iran, bypassed the banks and was barely used. Autonomy depends on enforcing Europe's own rules and having rails that firms can afford to use.



There is also a second goal besides autonomy: presence. Tokenised finance is growing on open networks where dollar stablecoins already set the standard. A single-tier euro confined to a permissioned European ledger would be autonomous but absent. On open networks, it would make the European Central Bank the frontline enforcer against holders it cannot know. An open second tier, anchored in central bank money and contestable by design, can deliver both.

Lucrezia Reichlin
London Business School, London NW1, UK

Once bitten, twice shy

Having been patched up by the NHS following a canine bite, I have much sympathy with the idea to "Bring back the dog licence" (Letters, October 24).

The letter rebases the old licence fee and concludes that, given the current dog population, it would raise £750mn a year.

Lest it be thought this is a trivial pursuit of tax, it is worth noting that the Office for Budget Responsibility estimates the net revenue raised by the "mansion tax" during its introductory year, 2028/29, is only £250mn.

David Starkie
Andover, Hampshire, UK

Why Reform doesn't give a fig for overseas donor rules

The plan to make donors returning to the UK wait a year before giving more than £100,000 to a political party makes sense, but it ignores the way the UK tax system invites abuse (Report, September 13).

The foreign income and gains (Fig) regime, designed by Jeremy Hunt and enacted by Rachel Reeves, allows anyone becoming UK tax resident after 10 years abroad to pay no tax on their foreign income and gains for four years.

Wealthy Reform UK donors with overseas fortunes may be discovering that becoming UK resident, and influencing the political landscape, is a painless endeavour. Even with a one-year wait before large donations, the Fig regime offers a perfect, if rainy, tax holiday to those seeking to fund the country's politics.

Why not simply treat anyone claiming the Fig regime as an overseas donor, subject to the £100,000 cap?

Britain's ability to score own goals remains impressive.

Philip Marcovici
Author, 'The Transformative Power of Family Wealth', Esher, Surrey, UK

OUTLOOK
SINGAPORE

The luxury apartments that nobody wants



by Owen Walker

Stepping out of the private lift at the top of the Norman Foster-designed South Beach Residences tower in Singapore's downtown, the estate agent assures me this penthouse is like nothing else on the market. "This one really has the 'wow' factor," he says.

He is not wrong. The vast living space has unparalleled views of the city-state's Marina Bay and surrounding skyline. The owner would, I'm told, never need to buy a ticket for the night-time Grand Prix, given the 42-storey lookout over the circuit.

Across three floors and over 6,500 sq feet, the four-bedroom property also has a steam room, a rooftop pool and hidden storage for jewellery and handbags. All yours for a snip at just over S$25mn ($20mn).

Except, nobody wants to buy it. The property was part of a group of seven luxury apartments put up for auction last month. Not one of them received a single bid.

The reason for the lack of interest is not hard to fathom. All seven — along with more than 70 others — were seized by authorities as part of an investigation into one of the city-state's most notorious crimes for a generation.

Three years ago, Singapore police conducted a series of raids, targeting a gang of Chinese money launderers. They confiscated assets worth more than S$3bn, including deluxe properties in upscale neighbourhoods like Orchard Road, sports cars, gold bars, expensive wines, designer handbags and crypto assets.

The scandal shocked this normally sedate country and tarnished its proud reputation for rule of law.

While the 10 individuals who were convicted have mostly served their jail time, the government is still trying to shift their confiscated loot. Deloitte has been entrusted with selling the property portfolio, which it is doing through a series of auctions. The proceeds will be deposited into the government's bank account.

But of the 25 apartments that have gone under the hammer so far, just four have sold.

Their unpopularity could be down to a local aversion to buying properties tainted by a high-profile crime or to Singaporeans shying away from the kind of ostentatious lifestyle favoured by the criminals. Sales of premium-brand cars such as Bentleys, Ferraris, Jaguars and Rolls-Royces have plummeted over the past couple of years in favour of electric vehicles. Golf club memberships are also less in demand, while one private wine club catering to ultra-wealthy Chinese clients was forced to close.

But not all lavish goods are out of favour. Among the forfeited hoard were personal items like one-off handbags and diamond-encrusted jewellery. Auctions of these goods have been more successful.

During a recent online sale, one bidder paid S$360,000 for a Hermès bracelet studded with 263 diamonds. Another agreed to pay S$87,000 for a pumpkin-shaped limited edition Louis Vuitton handbag designed by the Japanese artist Yayoi Kusama.

The lack of interest in the properties is down to prices that are considered too high for locals who know the back story. Singapore also has fewer foreign buyers of expensive real estate thanks to new stamp duty rules that add as much as 60 per cent of the value for non-residents.

Still, even if the properties have received few bids, the auctions are being closely watched. At the sale put on by property agents Edmund Tie & Company where the South Beach Residences penthouse was on the block, more than 60 people squeezed into the auction room. Stand fans were brought in to help keep people cool.

Most attendees seemed more interested in the spectacle than the apartments. "Please try to participate in these auctions, OK?" said the increasingly tetchy auctioneer. "Can we hear your bids? Who wants to cast the first bid? Don't be shy."

Outside, one attendee said he had come with the intention of bidding but found the asking prices too unrealistic. "With the reputation those properties have, I was expecting a hefty discount," he said, clutching the crumpled auction list in his hand. "Who would pay the full price for those?"

owen.walker@ft.com

Opinion

Beware the societal cost of economic insecurity

Isabella Weber

UK inflation rose to 3.5 per cent in September, its highest in almost a year, driven by energy prices spiking due to the Iran war. Markets expect the Bank of England to raise interest rates in November. The question is not whether to fight inflation, but how. The answer matters not only for the economy but for democracy.

In 2022, prices exploded in the things people cannot do without. According to the Office for National Statistics household costs measure, which tracks inflation as households experience it, inflation peaked at 12.7 per cent in October 2022, above the 11.1 per cent headline rate. But essentials — housing, food, energy, transport fuel and communication — rose by 22.5 per cent, according to my calculations.

But the burden is shared unequally across the income distribution. For the bottom half of households, the essentials they bought in 2021-22 would have cost 57 per cent of their income a year later, up from 49 per cent. But their incomes rose by just about 2 per cent. So they cut back. They bought about 7 per cent less food and turned down the heating. And they still ended up spending a larger share of their income on the basics. People carried on working. Yet the promise that work provides a decent and secure life, already fraying for years, wore thinner still.

This loss of economic security has political consequences. It is a breeding ground for the extreme right. In Germany, low-income tenants whose local rents rose by €1 per square metre were 4 percentage points more likely to support the far-right Alternative for Germany (AfD). Research on Brexit found that economic insecurity among middle-class voters was a stronger predictor of the Leave vote than hardship in the most deprived communities. In Britain, Reform polled in single digits at the height of the price shock, then surged as prices stayed high, wages lagged behind and Sir Keir Starmer's government failed to address the affordability crisis.

Higher interest rates cannot fix inflation in essentials. They do not produce more energy or make food affordable. Rate rises work by cooling demand, and weaker hiring is the key mechanism. For households squeezed by the cost of essentials, this adds the fear for their job to the struggle to pay rising bills.

> Keeping the far right in check requires delivering an affordable life, and a rate rise will make this harder

Rate rises also drive up the cost of housing, and thus cause a second round of squeezing. About 85 per cent of mortgages are fixed, but mostly only for two or five years. After 2022, food and energy hit low-income renters hardest; mortgage costs then hit middle and higher-income owners. Higher rates also price young people out of home ownership. They raise the cost of the renewable investments that would make us less vulnerable to fossil-fuel shocks. And they push up government borrowing costs, leaving less room to respond.

After the second world war, policymakers understood that economic security and dignity are key to making democracy resilient to fascism. John Maynard Keynes had warned in 1919 that economic privation proceeds largely unnoticed "until the limit of human endurance is reached". Then people listen "to whatever instruction of hope, illusion, or revenge is carried to them in the air". The architects of the postwar order acted on that lesson. Harold Laski shaped Labour's winning 1945 platform. He insisted that essentials had to be under public control so that society's fate was not in the hands of a handful of private companies. William Beveridge's war on "want" was also a war in defence of democracy.

Today, we need an inflation-fighting toolbox that stabilises the prices of essentials and uses the time this buys to address the deeper causes of the cost of living crisis. In energy, this means guaranteed prices for a base level of consumption, financed by windfall profit taxes, while building out cheaper renewable power. In housing, it means rent freezes and an ambitious programme of green council homes.

There are early signs that this approach resonates with voters. At Labour's conference last month, Andy Burnham promised public control of water, energy and housing, and a National Care Service. Since he became leader, Labour has overtaken Reform UK in the polls, ending its 16-month lead. But the cost of living protests across Europe should stand as a warning. Keeping the far right in check requires delivering on the promise of an affordable life, and a rate rise will make this harder.

Price stability matters. But so does how we achieve it. If the fight against inflation leaves people poorer, more indebted and less secure, we risk deepening the conditions that put democracy at risk.

The writer is author of 'Anti-Fascist Economics'

The politics of escalation against Iran



Ann Kiernan

GLOBAL AFFAIRS

Gideon Rachman



The oil price hit $117 last week. US President Donald Trump seems to think that this is all the fault of Ukraine's leader Volodymyr Zelenskyy. But the markets appear more concerned by the prospect of an escalation of war in the Middle East.

Unfortunately, the market reaction is rational. The signs are that the US and Israel are poised for a renewed assault on Iran, soon after the midterm elections in America next week.

The joint US-Israeli attack on Iran in February — which began with the assassination of the country's leadership — failed to achieve its goal of toppling the Islamic republic. Even if the US and Israel widen their target list and use even more destructive weaponry, it is still unlikely that an intensified campaign would achieve regime change or force major concessions from Iran.

The more probable result is that the Iranians will hit back hard. All the targets that Iran or its allies have struck in recent months — the infrastructure of Saudi Arabia and the Gulf states, US military bases in the region and ships going through the Strait of Hormuz — remain within range. The secondary effects of intensified Iranian attacks on energy prices and the world economy are predictable.

Iran also has escalatory options that it has not yet reached for — such as attacks on water desalination plants and undersea communications cables. Some serious analysts have even floated the possibility that it could launch a ground offensive against US bases in Bahrain or Kuwait.

So why take the risk? The answer is that neither Trump nor Benjamin Netanyahu, Israel's prime minister, seem able to accept the fact that their military campaign has failed.

There is no sign that they have a coherent plan for victory. Instead, they are fuelled by the hope that a few more savage blows will force Iran to back down — reopening the Strait of Hormuz unconditionally and surrendering its stock of highly enriched uranium.

Politically, Trump and Netanyahu find themselves in curiously similar situations. Both face imminent elections that are likely to go badly for them. Both are going to the polls against the backdrop of the failure of the Iran campaign.

But the war has played very differently in the politics of the US and Israel. It is overwhelmingly unpopular in the US — where it is associated with rising prices and a loss of American lives and prestige.

By contrast, the decision to attack Iran remains popular in Israel. The main critique of Netanyahu made in the campaign by the opposition parties is that he has failed to finish the job.

Despite this, and his failure to protect Israel from the Hamas attack of October 7, 2023, Netanyahu is still campaigning on national security issues. In the closing days of the election campaign, he has shared an AI-generated image of a nuclear explosion over Tel Aviv, with the accompanying claim that "Israel is in real and tangible existential danger".

Netanyahu is believed to have pressed for a renewed assault on Iran before Israel votes on Tuesday. With the polls suggesting that the bloc of parties that support his government will narrowly lose the election, he may have felt that a renewal of the war with Iran would give him an electoral boost.

> Neither Trump nor Netanyahu seem able to accept that their military campaign has failed

Trump, by contrast, seems keen to defer any new attack on Iran until after America has voted. And, since he is the senior partner in the relationship with Netanyahu, his view has prevailed.

The political situation will be different after the Israeli and American elections. Even if both Trump and Netanyahu go down to defeat, they may both still have the motive and the means to renew the war on Iran.

It could take weeks or months to form a new Israeli coalition government. In the meantime, Netanyahu is likely to stay on as prime minister — with the legal right to order military action if he deems it to be in the interests of Israeli national security.

Some analysts, such as Danny Citrinowicz, of Israel's Institute for National Security Studies, have also pointed out that a renewal of war with Iran might allow Netanyahu to press for a national unity government, which he would lead.

As for the US, even if the Republicans lose control of both houses of Congress, Trump will still be commander-in-chief of America's armed forces. His desire for vengeance and shows of strength may only increase if he is humiliated at the ballot box.

For all these reasons, an intensification of the war against Iran is more likely than not. But, of course, nothing is certain with Trump. The US president has promised military escalation against Iran several times in recent months — only to back off.

The reasons that he failed to follow through in the past all still remain compelling. American forces and allies in the region are vulnerable to retaliation. The campaign to date has already depleted crucial munitions — in particular missile interceptors. A renewed war will be bad for the economy and for the markets. There is no convincing path to victory.

But the fact that a renewed military campaign makes little sense does not mean it won't happen. Defeat at the ballot box may convince both Netanyahu and Trump to try once again for victory on the battlefield.

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Should farmers embrace AI?

Maximo Torero

Pope Leo XIV is from Chicago, but he might as well be from rural Iowa. He made a prescient observation in his recent encyclical on AI: digital technology should be assessed according to whether it ensures fair access to opportunities, speaking directly to farmers everywhere without ever mentioning agriculture.

The common concern is that AI will produce goods and services with less labour, leaving us all with fewer jobs. But agriculture has different challenges, including ageing farmers, skills gaps and low labour productivity.

AI could boost industry productivity; the question is which farms it would do this for. It could make large, highly mechanised farms more efficient. But smaller operations that cannot afford expensive machinery, high-speed internet or subscriptions to AI services may fall even further behind.

This matters because smallholders (with less than five acres) make up 85 per cent of the world's farms. In poorer countries, they are crucial for food security, producing 60 per cent of food crops.

Agriculture has some of the worst information gaps of any sector. Farmers often have to make big, long-term decisions about everything from seeds to market prices with scant information. This is compounded by climate and geopolitical shocks that can rapidly disrupt growing conditions and affect fuel and fertiliser prices. The gap affects smallholders the most.

In some places, "extension workers" — agricultural advisers who help farmers adopt new practices — face the impossible task of reaching millions of producers across vast areas.

AI may prove a godsend in this case. It could enable advisers to support more farmers and narrow the information gap by translating information into local languages, integrating weather, soil and market data, identifying crop diseases and improving price transparency.

A 2026 study of 240 agricultural advisers in Benin, for example, found that those using generative AI gave better advice. In India, an AI tool that can tell cotton farmers, in eight Indian languages, when and how much pesticide to apply has been used by more than 30,000 of them, with revenue gains of up to 24 per cent. In a trial in China, an AI system using weather and soil data and computer vision to guide irrigation and pesticide use increased wheat and maize yields by 7 and 4 per cent respectively.

> The challenge is to ensure the technology doesn't create a lost generation of excluded people

But, alongside this promise, the Pope rightly sounds a warning: technology can create new forms of exclusion.

An AI lending model may deny smallholders a loan or charge higher interest because they lack financial records used to assess risk. A subsidy system may exclude farmers without formal land titles. AI systems trained on large farms may not suit small plots.

There is also evidence AI tools can be biased. For instance, some systems were found to systematically favour commercial products for protecting crops over sustainable biodiversity-based alternatives, reinforcing farmers' dependence on products they must buy rather than practices they can adopt for free and are more beneficial to nature.

So how can farmers of all sizes use AI to become more productive?

By sticking to a simple principle: the higher the potential for harm, the greater the need for caution. An AI tool that identifies a crop disease presents relatively limited risks and should be easy to test and deploy. The stakes are higher for systems that help determine if a farmer receives a loan or insurance, or makes decisions affecting harvests or food safety. Those applications should have strict requirements for testing, human oversight and transparency. And farmers should be able to challenge decisions and seek redress.

At the highest risk levels, safeguards should be backed by binding legal agreements. This matters as much for farmers as for global AI safety and could establish common obligations for the largest AI companies, including independent safety audits and safeguards against discrimination or abuse of market power.

Regulation alone won't get AI on to a farmer's phone in Benin. Governments will still need to invest in connectivity, digital skills, data and advisory services. But it can help prevent a technology with enormous potential from widening the gap between those with access and those without.

Some 44 per cent of young people depend on agrifood systems for their livelihoods. To thrive, much less survive, they'll need the help of AI. The challenge is to ensure it doesn't create a lost generation of excluded people.

The writer is the chief economist of the UN Food and Agriculture Organization in Rome

Serbia, like Hungary, shows power of the people

EUROPE

Ben Hall



When the FT interviewed Aleksandar Vučić in his Belgrade office in 2018, one year after becoming president of Serbia, he recounted how his namesake was defenestrated from the same spot in an army coup in 1903. King Alexander clung to the balustrade until his fingers were hacked off by his assailants.

On Sunday, Vučić himself was turfed out of power after a landslide victory for the grassroots Student List movement in parliamentary elections. Contrary to what many Serbs had feared, he showed no sign of trying to cling on like his ill-fated predecessor.

It is one of several parallels with former Hungarian premier Viktor Orbán, who also threw in the towel early after losing elections in April. Vučić's defeat is, following Orbán's, another electoral earthquake in south-eastern Europe that will reverberate well beyond the country's borders.

It is also another example of people power overcoming an autocrat's determined and systematic efforts to stack the electoral system in his favour.

The result triggered wild celebrations on the streets of Belgrade, just as Orbán's demise did in Budapest. "Ring a bell?" Péter Magyar, Hungary's new prime minister and Orbán's nemesis, wrote on Facebook on Sunday night.

As he approached the end of his maximum two terms as president, Vučić pivoted back to running for parliament as prime minister, a position he held from 2014-17. It was a trick borrowed from Russian leader Vladimir Putin, who swapped jobs with his premier Dmitry Medvedev in order to maintain his grip on power. But in Serbia voters did not fall for it.

> Citizens turned against Vučić after a railway station disaster blamed on government graft

With 99 per cent of votes counted, Vučić's rightwing populist Serbian Progressive Party (SNS) was left with only 97 seats in the 250-seat parliament while Student List won 139. Seeing the writing on the wall soon after voting ended on Sunday, Vučić promptly conceded defeat.

As Serbia's undisputed leader for the past 12 years, Vučić turned his country into what political scientists call a "competitive authoritarian" system. There are competitive elections, but the contest is stacked in favour of the incumbent with the ruling party exerting increasing control of the state, business and civil society.

Vučić, a former propaganda minister for the nationalist leader Slobodan Milošević, was adept at tapping into Serbian nationalism to rally his core supporters and divide his opponents. The late Ratko Mladić, a Bosnian Serb commander convicted of crimes against humanity during the Yugoslav wars, was given a funeral with military honours in Belgrade last month, causing outrage across Europe.

Orbán perfected many of these autocratic techniques. But they were not enough to stop Hungarians, incensed by government corruption and falling living standards, from finally turning against him. Likewise, Serbs turned decisively against Vučić after a railway station disaster in late 2024 blamed on government graft and unaccountability. They were galvanised by student demonstrators, who went on to form a parliamentary campaign fronted by their professors and other apolitical professionals.

Unlike the ruthlessly disciplined and professional opposition under Magyar in Hungary, the Student List has no obvious leader, no experienced political operatives and an amorphous agenda. It embraces pro-European and nationalist groups. Its contradictions may soon be exposed when it begins to form a government and policy programme. But its victory gives Serbia a chance to restore democratic checks and balances, to restart its stalled EU membership bid and to play a more constructive role in Kosovo, Bosnia and elsewhere in its neighbourhood. Serbia has an opportunity for a new beginning.

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Opinion

I went to India and found it has lessons for us all

Young people have revived the country's glorious tradition of nonviolent dissent.



Lydia Polgreen

NEW DELHI Narendra Modi, the barrel-chested strongman leader of India for the past dozen years, has finally met his match — and it looks a lot like Mohini Majumdar. Just 20 years old, slender and voluble, Majumdar is an English student at Delhi University: an unlikely antagonist for an omnipotent autocrat.

Yet early on Oct. 10, she shared an early morning taxi to the center of Delhi with a gaggle of classmates. Dressed casually in flowing cotton and sensible shoes, Majumdar and her friends could just as easily have been on their way to a stroll in one of this city's splendid gardens. But their plan, she told me, was to march across the street to a place called Jantar Mantar, a historic monument at the center of Delhi that has for decades served as a designated ground for protest.



They had been there before, over the summer, joining thousands of other young people in raucous, meme-driven protests after a leaked paper led to the cancellation of a college entrance exam. Eventually, under the banner of the upstart Cockroach Janata Party, they forced the resignation of India's education minister. It was the first time Modi's government had dismissed a top official under pressure from public protests.

Now, they were back for an even bigger fish: Modi's handpicked chief election commissioner, who had overseen the deletion of more than 130 million people from the country's voter rolls in a murky process that threatened to undermine faith in the voting process in the world's largest democracy. "These kinds of protests really prove that you should be political, and everything is political in our life," Majumdar told me as she waited for the march to begin.

She never did get to march that day. A few minutes after I spoke with her and her friends, a column of police officers decked out in camouflage descended on the students, manhandling them into a waiting bus. The officers drove them 40 minutes north of the city center and held them in a police station until after dark, eventually letting the women go; only when they refused to leave did the officers also release the men.

So great was the threat these students presented to Modi's rule that his government reportedly deployed over 50,000 security personnel to the streets, shut down dozens of metro stations, blocked long-distance trains from arriving in Delhi and threw up yellow steel barricades across the capital, leaving its usually teeming streets eerily deserted. Majumdar was one of thousands of people detained that day by the authorities in an all-out attempt to quash the protest.

Despite these efforts, Modi appears more vulnerable than at any time since he was first elected prime minister. Young people like Majumdar, educated, middle-class and Hindu — the children of a generation that rocketed him to power — are in open revolt, incensed by the government's derogation of education and democracy. Willing to risk detention and the baton blows of the feared lathi, they are setting out to make Modi, who has carefully managed his image as a civilizational figure who will lift India into glory, an object of fun. Majumdar, undeterred by her detention, joined another protest the very next day.

"The moment you oppressed me, the fear was gone," she told me.

For Modi, it is a stunning turnabout. For over a decade, his rule seemed durable and unshakable. His rise to power, initially inconceivable and then inevitable, was a foretaste of the world to come. Before Brexit blew apart Britain, before Donald Trump ascended to the American presidency, before an influx of Syrian refugees turned European politics rightward, Modi led the world's largest democracy toward a vision of nationalist, right-wing populism, promising a civilizational restoration.

Today, India is once again in the vanguard — this time leading, perhaps, in the opposite direction. As Modi has consolidated his power over this vast nation and its sprawling state apparatus, many Indians have grown weary of the bargain he has offered: growth and national prosperity in return for a hardening authoritarianism. Beset as Modi is by crises within and without, his iron grip on power is clanging against the steel of India's messy democracy. As governments struggle and discontent flourishes worldwide, the country offers a lesson for us all.

WHEN I MOVED TO INDIA as a correspondent for The New York Times in 2009, I discovered a place brimming with optimism and ripe with possibility. Fresh off an election victory, the Congress Party formed a sturdy coalition government led by Manmohan Singh, a soft-spoken, teetotal technocrat with a Ph.D. in economics. Unfettered by its most irksome left-wing coalition partners, his government would be free to make deep reforms and get India's economy soaring.

It didn't work out that way. Indians saw their dreams of prosperity founder in the wake of the global financial crisis, while their government was snarled in scandals of grubby self-dealing. An anti-corruption protest movement sprang up, expressive of deep discontent that Modi's right-wing Hindu nationalist party rode to power. Modi pointed to the prosperous state he governed, Gujarat, and promised to do the same for the rest of India.

Abstemious and devout, Modi offered himself up as a servant leader with no personal interests to pursue beyond the uplift of the nation. For many Hindus, his assertion of Hindu pride and even supremacy proved enticing. That he allegedly stood by idly as hundreds of Muslims died in religious riots in the state he governed in 2002 — his role in this tragedy led the United States to deny him entry for nine years — was mostly ignored by the public.



PHOTOGRAPHS BY ABHISHEK KHEDEKAR FOR THE NEW YORK TIMES

One of the voters who rolled the dice on Modi was a man named Surender Kumar. I met him outside a popular market in Delhi, where he was waiting for passengers in his motorized rickshaw. Back in 2014, he was angry about corruption and thought it was time for a change. He cast his ballot, with some hesitation, for Modi's Bharatiya Janata Party. But a dozen

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Above, a copy of the Indian Constitution being raised at a rally this month in New Delhi; left, Aditi at Jawaharlal Nehru University in New Delhi.

America's warped mirror image in Brazil

The Brazilian echoes of U.S. politics have become too eerie to deny.

Brian Winter

How self-obsessed — how quintessentially American — to believe that America's political rhythms could dictate those of a country as large and idiosyncratic as Brazil.

For the first half of my career as a journalist and an analyst following Latin American politics, this was my message to U.S. audiences: Brazil, the world's seventh-most-populous nation, with a landmass greater than the continental United States, governed by a Portuguese-descended monarchy in the 19th century, a military dictatorship for part of the 20th and a vibrant if often messy democracy in the 21st, would always dance to its own drummer.

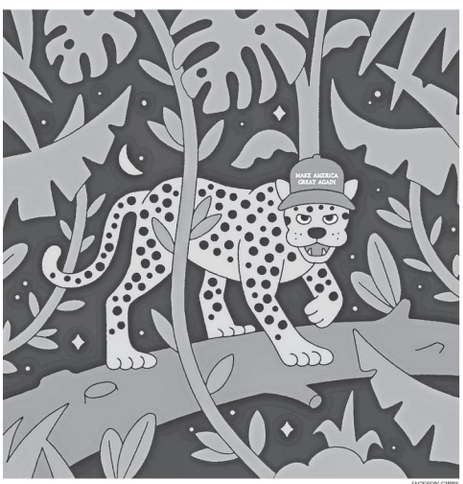
But then, starting around a decade ago, the Brazilian echoes of American politics became too eerie to deny, like watching a Brazilian spinoff of a U.S. television series with a two-year production lag and a few homegrown plot twists. The 2016 election of Donald Trump was followed by the 2018 arrival of the "Trump of the Tropics," Jair Bolsonaro, so in sync with his northern counterpart in style and worldview that he once livestreamed himself for an hour quietly watching Mr. Trump give a news conference on TV.

Like Mr. Trump in 2020, Mr. Bolsonaro narrowly lost his re-election bid in 2022, after voters tired of his clashes with democratic institutions and mismanagement of the Covid-19 pandemic. He then did everything in his power to try to overturn the result, including attempting to organize a military coup. When that effort failed, and hundreds of the defeated president's supporters invaded government buildings in Brasília on Jan. 8, 2023, shattering windows and vandalizing offices, the comparisons practically wrote themselves: "Brazil's Jan. 6 arrived two days late," Olívia Bulla, a veteran Brazilian journalist, drolly noted at the time.

On Sunday, history almost repeated itself, more or less, once again. While Jair Bolsonaro remains under house arrest for his attempted coup, his son Flávio, a senator, rejected the results of the re-election of the incumbent, Luiz Inácio Lula da Silva. Even as the Bolsonaro family was written off by most of the Brazilian establishment as politically dead just a few months ago, Flávio unexpectedly placed first in the initial round of voting on Oct. 4, setting up a runoff election on Sunday.

Mr. Lula, an 80-year-old leftist who has posted videos of himself boxing and lifting weights in an explicit attempt to stave off comparisons to Joe Biden, was nonetheless tarred as the face of an aging, out-of-touch establishment. Mr. Lula was pursuing a fourth nonconsecutive term as president in a campaign season marked by public anger over inflation, crime and "affordability" (Brazilian newspapers have regularly used the English word). Heading into the second vote, Mr. Bolsonaro led Mr. Lula by a small margin in recent polls. Mr. Lula was declared the winner on Sunday, but Mr. Bolsonaro called for the election to be annulled.

The question of exactly why two nations separated by thousands of miles, with such different political histories and socioeconomic structures, have of late walked such similar paths has set off vigorous debate, and no shortage of memes, inside Brazil. Some have warned against overstating the similarities, pointing to distinctly Brazilian elements including this election's arguably existential stakes for the Amazon rainforest, or Mr. Lula's biography as a leader who rose from poverty to oversee an economic boom that lifted millions into the middle class during his first two terms from 2003 through 2010.



JACKSON GIBBS

These things are all true. But it is also true that both direct U.S. influence and several shared political and economic trends have combined to nudge not only Brazil, but other countries in Latin America, in a decidedly Bolso-Trumpian direction in recent years.

In Mr. Trump's first term, both the president and others in his circle of advisers, particularly Steve Bannon, took an interest in the Bolsonaros even before they were elected. Eager to aid ideological fellow travelers at a time when the list didn't extend far beyond Viktor Orban, then the prime minister of Hungary, Mr. Bannon helped ease the family's entrance into global right-wing circles and conservative U.S. forums like the Conservative Political Action Conference. An adviser to the Bolsonaros once told me they "took enthusiastic notes" from their new friends in the White House about incorporating U.S. culture war themes like gender ideology, as well as attacks on "fake news" and the press, that had not been major features of mainstream politics since democracy returned in the 1980s.

U.S. interference in Brazilian politics has since become more heavy-handed. In 2025, Mr. Trump imposed a 50 percent tariff on Brazilian exports, hoping to persuade Brazil's courts to drop their case against Jair Bolsonaro — "a WITCH HUNT," the U.S. president wrote at the time, "something I know much about!" When that effort backfired, and polls showed a nationalist backlash lifting Mr. Lula's approval ratings, Mr. Trump reversed course; he has mostly stayed quiet about the Brazilian election in recent months.

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OPINION

The New York Times
INTERNATIONAL EDITION

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The unblinking eyes of Elizabeth Holmes



Maureen Dowd

WASHINGTON You'd think we'd be weary of flimflam artists, tech vampires and alternative realities by now. But no.

It's like Gertrude's lust in "Hamlet": "As if increase of appetite had grown / By what it fed on."

In a time of deceit — political, algorithmic and every other way — a meditation on deceit has taken the culture by storm.

Meditation is not the right word, actually. It's more like a film noir thriller, with a manipulative femme fatale, a destructive romance, a man who's meant to play the fall guy, and an atmospheric cottage by the sea.

The three-hour documentary about Theranos fraudster Elizabeth Holmes, "You Can See Everything," is paradoxically titled, because you can't see much of anything. (Except her naked narcissistic fiancé preening in the shower.) Holmes is busy obscuring the truth and building an illusory world where her dangerous fraud about comprehensive medical testing with a pinprick of blood was just an innocent hiccup.

Look into the vacant gaze and see an abyss.

"I know I didn't commit any crime," she assures the filmmaker Nathan Fielder, training her big, blue Furby eyes on him. She doesn't think she has ever lied in her life, she says. It was all just a misunderstanding. Never mind the threatening lawyers like David Boies she sicced on anyone who questioned her phantom technology.

Holmes abandoned her Steve Jobs black turtleneck in favor of J. Crew-looking soccer mom sweaters. But she remains the perfect avatar for our age: She promised tech that would help humanity and then unleashed a deception that could have hurt humanity.

Holmes and her partner, who had two children before her 11-year sentence for fraud began in Texas in 2023, wanted a sympathetic documentary charting her last weeks with her family before she got locked up. They stumbled upon Fielder, who directed the movie along with Lance Oppenheim, and ended up starring in it.

Fielder originally did not intend to appear onscreen, but Holmes irresistibly drew him into her web, and the resulting game of cat-and-mouse between the two magicians is astonishing.



ILLUSTRATION BY THE NEW YORK TIMES; SOURCE PHOTOGRAPHS VIA A24

The deadpan Fielder is a Canadian-born satirist who worked with Sacha Baron Cohen on the 2018 mockumentary "Who Is America?" and on his own shows, "Nathan for You" on Comedy Central and "The Rehearsal" on HBO, where he has built elaborate ruses. He is a master at spinning his own absurd reality, and so is Holmes.

The sparring of these two raises the question: Is there any point searching for the truth or is it better to settle into our own fractured, subjective realities?

At 30, Holmes became the first self-made female billionaire, after she dropped out of Stanford at 20 and started Theranos. But she's no role model for women. When she got in trouble she embraced victimhood, turning from a confident Silicon Valley founder who dominated every room into a damsel in distress. In court, she blamed her lover/partner, Sunny Balwani, who got an almost 13-year sentence for helping Holmes defraud investors of more than $700 million. She said he abused her psychologically and sexually and controlled everything, from her clothes to her diet. The jury was unconvinced.

Holmes tries to turn Fielder into a film noir sap, someone who will believe her lies about her lies, be drawn to her emotionally and come to her rescue. And the documentary projects, then calls into question, a scenario where her current lover/partner, Billy Evans, is manipulating her, asking for a cut of the documentary's profits supposedly behind her back, taking over her X account and putting up foul-mouthed posts pretending to be her, releasing a hologram of Holmes that he nonchalantly acknowledges might be used by some men online for porn.

The woman famous for her guile — suckering George Shultz, Jim Mattis, Henry Kissinger, Sam Nunn, Larry Ellison, Rupert Murdoch and other brainy older men — plays guileless, acting as if she can't even scramble eggs without her controlling fiancé's help, or understand the simplistic joke in the classic Abbott and Costello "Who's on first?" comedy routine. Fielder jokes that if Holmes had "just said that Theranos was a comedy bit, maybe you could get off scot-free." The couple talk about building "monuments of love" to each other, but it's more like monuments of manipulation.

Tyler Shultz, George Shultz's grandson, who was an intern and researcher at Theranos and then left and blew the whistle on Holmes, said on "CBS Mornings" that Holmes took in Fielder enough to allow doubt to creep in about Holmes's guilt.

"She knows that she was lying," Shultz said, "because she created this whole web of lies that you would not have needed to create if you actually believed the lies."

Shultz said the harm to real patients was horrible and Fielder never laid out the dimensions of her crimes.

"We told people that they had H.I.V. when they did not," he said. "We told people that they had cancer when they did not. We told expecting mothers that they had lost their unborn child when they had not."

Amanda Seyfried, who won an Emmy for playing Holmes in Hulu's "The Dropout," also wonders if Fielder is too "protective of her." The actress reprises her role in some scenes in the documentary and visits Holmes's family after she goes to prison, getting chided by Evans for her Hulu portrayal.

Evans is a handsome, buff man, the scion of a wealthy hotel family who is now determined to work with Liz, as she is known now, to straighten out the problems with her blood-testing method. But as the film goes on, there's a Dorian Gray effect, where his face grows scarier, twisted into a mask of rage and subterfuge. Is Evans, not Fielder, the sap? As in film noir, the boyfriend carries a rod and is vowing vengeance.

Whether or not you think Fielder isn't tough enough on Holmes, it is impossible to look away from her. Her unblinking gaze is like the disembodied blue eyes in the haunting billboard in "The Great Gatsby," and both represent the same thing: moral decay.

CORRECTION

A photo caption in an article on Friday about the election in Serbia misidentified the official pictured. It was Milorad Dodik, not Aleksandar Vucic.

I went to India and found it has lessons for us all

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years on, he is disappointed. "The government came with certain kinds of promises during the elections, and none of them we see right now," he told me. "Just to protect kingmakers in the government, they are letting kids be beaten."

Though Kumar's parents had been penniless manual laborers, he managed to leave their world of physical toil behind. Driving his rickshaw could net him between $200 and $300 a month, before expenses, a decent working-class living. But his son and daughter, growing into adulthood during Modi's tenure, haven't been able to make a similar leap.

Kumar could not afford private school or tutoring classes for them, so neither made it to college. His daughter studied cosmetology and opened a small beauty salon, but has struggled to make a go of it. His son works at McDonald's, earning what his father describes as pocket change. Inflation eats away at his own earnings: The price of the natural gas that fuels his rickshaw has more than doubled, he told me. "You can't name a thing which has retained its price," he said. "Rice, cooking oil, mustard oil, cooking cylinders."

Further up the economic ladder, among the middle-class Hindu families that make up many of Modi's most fervent supporters, the struggle to provide economic advancement for the next generation is both all-consuming and increasingly uncertain.

IN A SPRAWLING, tree-filled apartment complex at the northern edge of Delhi, Shivani Sharma, a teacher, described a life that revolved around a singular goal: getting her 17-year-old daughter, Sanskriti, into a good public university and launched into a well-paying career. This has involved expensive private schools and costly tutoring sessions to sharpen her math and science skills in preparation for the relentless battery of highly competitive government-administered entrance exams.

"You have to have a very good score," Sharma said. "Only then you can get entry into the Delhi University," the prestigious school where she had gotten her bachelor's degree in the 1990s.

Modi's centralization — the very thing that seemed destined to consolidate his power — has become a booby trap.

For middle-class families, admission to a good public university is akin to a lottery ticket — the tuition is low and the credential confers real prestige. If Sanskriti does not make the cut, the family may have to come up with upward of $15,000 per year to pay for a private college. As it is, they struggle to keep up with her current educational expenses. In addition to running a school with her husband, Sharma earns extra money by tutoring children in the neighborhood. Her husband has a part-time job in a clothing showroom.

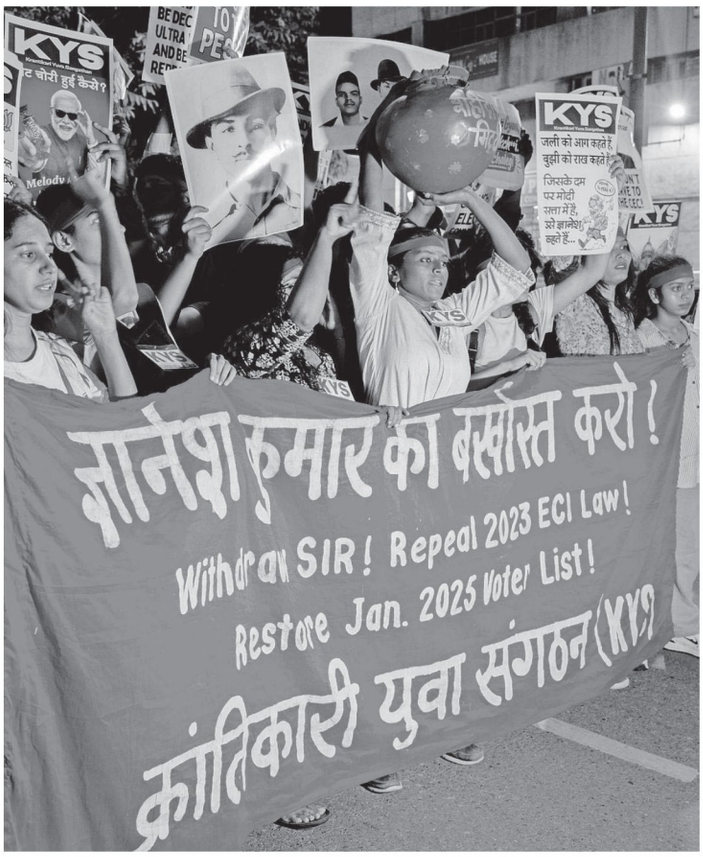
"We live simply," she told me. "We don't take international tours. We don't wear expensive clothes. We don't spend money here and there. We try to save money for our daughter's education." Sharma grew up in a big family, with five sisters and a brother. Yet none of her siblings has more than two children, she said. "We didn't opt for the second child because I knew it's very expensive and it's very difficult to raise both the children and give them a good lifestyle and good education," she told me.

Given the stakes, the leaked exam paper — expressive of deep corruption in the education system — rattled Sharma. "Some children committed suicide," she said. "Only insiders can leak the paper. Who else can leak the paper? It's a lot of corruption."

Even a bachelor's degree from a prestigious college is no guarantee in a country where graduate unemployment is at nearly 40 percent for those ages 15 to 29 and starting salaries are abysmally low. Food delivery drivers often earn more than entry-level tech workers with engineering degrees. To improve Sanskriti's chances in life, Sharma said they are considering sending her abroad for a master's degree. That would probably cost $100,000, an unfathomable sum that would require them to go into debt.

Young people across the country increasingly see this as a fool's bargain, a debt-filled dead end. And they are not afraid to say so, loudly and publicly. Aditi (she goes by one name), the 29-year-old president of the students' union at Jawaharlal Nehru University, is emblematic. Her parents are stalwart supporters of the B.J.P. But like many members of Gen Z, she rejects the empty promises of Hindu nationalism. "People have gotten bored with Modi's narrative," she told me. "Young people have tasted blood."

MODI'S GOVERNMENT has faced down discontent before. In 2019, a new citizenship law that targeted Muslims was rightly seen as an affront to India's foundational ideal of secularism, enshrined in its constitution. But Modi was mostly able to wave that away as minority special pleading. Protests the next year by farmers, heavily drawn from India's Sikh minority, could be dismissed as separatist agitation, even as the government mostly ceded to the farmers' demands.





PHOTOGRAPHS BY ABHISHEK KHEDEKAR FOR THE NEW YORK TIMES

Top, protesters in New Delhi on Oct. 16; above, Shivani Sharma, left, and her daughter, Sanskriti, right. For middle-class families, admission to a good public university is akin to a lottery ticket — the tuition is low and the credential confers real prestige.

But this time, the protests have been driven in part by the concerns of the aspirational Hindu families that are the bedrock of Modi's coalition. For many of these Indians, it may have been possible to ignore the ugly aspects of Modi's rule, indeed to retreat from politics altogether and focus on building futures for themselves and their children. But many are realizing that all their hard work can be scuppered by a purloined exam answer sheet; by the devaluation of college degrees, which command little premium in an oversupplied labor market; and by a compromised election commission that could silence their most fundamental individual choice in a country of over 1.4 billion people.

Modi's centralization — the very thing that seemed destined to consolidate his power — has become a booby trap. He captured and muzzled the mainstream press, especially television news, only for an enormous ecosystem of independent and influential journalists to rise up on YouTube and Instagram. He centralized the process of college examinations, leaving him no one else to blame when evidence of systemic leaking of exam papers emerged. His control over the election commission has left him with few options when faced with difficult questions over deleted voters.

Modi has also discovered that despite his efforts to project global leadership, his power quickly fades at the water's edge. After promising to elevate India to great-power status, he has found himself stuck, subject to the mundane gravity of global events over which he has little control. He has suffered a series of embarrassments on the world stage, especially at the hands of the Trump administration.

What's more, the pressure valve of migration is tightening. On the upper end of society, the dream of sending a child abroad, especially to the United States, is dying. On the lower end, uncertainty in the Persian Gulf is making migrant labor there a shakier proposition too. For a country that is the world's largest receiver of remittances, amounting to roughly 4 percent of gross domestic product, that's a big problem. That's before you consider rising prices for fuel and tariffs on exports.

There will be no sudden fall for Modi. Though leaders in neighboring South Asian countries like Nepal, Bangladesh and Sri Lanka have been swept aside by youth uprisings, there is little chance of that happening here. India may seem like a chaotic and cacophonous place, and in many ways it is. Yet India's government has always changed through the orderly process of elections, and Modi will not face the national electorate again until 2029.

But something profound has shifted. Modi's aura of omnipotence and serene competence has been shattered. The protests have transformed his main challenger, Rahul Gandhi of the Congress Party, as well. They have given him the chance to shed his image as the pampered and ineffectual scion of a storied political dynasty. The political landscape, settled for so long, is suddenly altered.

INDIA'S DEMOCRACY has always been improbable. It is a society of boggling diversity and deep divides of religion, ethnicity and caste. Inequality, always pervasive, has deepened as the country has grown richer in ragged, uneven ways. And yet its constitutional democracy has endured, with the brief exception of Indira Gandhi's emergency rule, since its independence from Britain nearly eight decades ago.

It is telling that this unexpected challenge to Modi's power was catalyzed by affronts to two fundamental features of Indian democracy. As the political scientist Pratap Bhanu Mehta explained to me, taking exams and voting in elections are perhaps the two most important pillars of individual agency in India. Each contains the possibility of self-actualization, something that can seem nearly impossible in a country that is simultaneously so multitudinous and so hierarchical.

Exams hold the promise that anyone from anywhere, with enough hard work, can improve his or her station in life. Even more fundamental, if diffuse, is the individual franchise, which carries the notion that each citizen has an equal role in choosing who governs India. These two pillars, Mehta told me, are "the self-conscious revolt against caste, kinship, religion." This is perhaps why copies of the Indian Constitution have figured so prominently in the protests, along with images of its main architect, Bhimrao Ramji Ambedkar.

It is easy to harbor romantic notions about Indian democracy. It is a project never before attempted in human history — for so many people with so much diversity to live together by common assent, under a written constitution that guarantees rights for all. For the past 12 years, India has engaged in a different experiment, one all too willing to brush aside the unfulfilled aspirations of the Constitution in the name of material progress and Hindu pride.

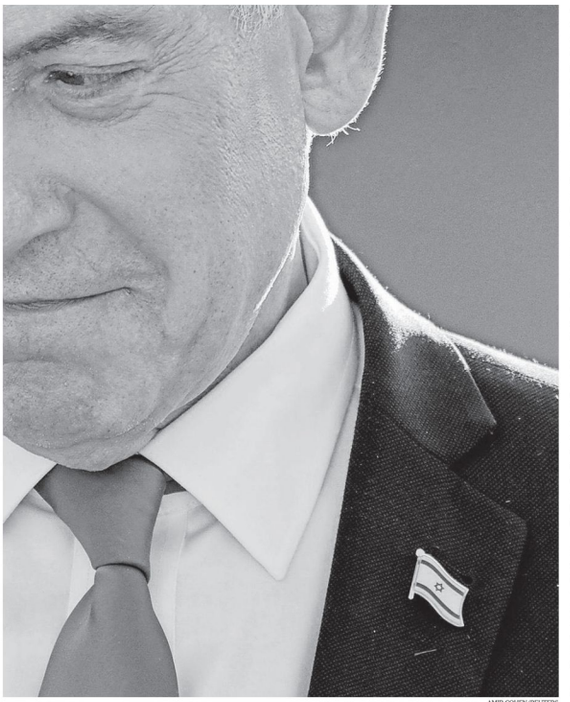
But a new generation of Indians has risen up, insisting that the price of that trade is far too high. Armed only with witty slogans and astonishing bravery, these young people have revived their country's glorious tradition of nonviolent dissent. As peers from Paris to Tirana, Milan to Madrid, take to the streets demanding radical change, they would do well to look to Delhi as a guide.

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Israel's prime minister won the Middle East and lost the world



Ezra Klein



AMIR COHEN/REUTERS

Israelis today choose their next government. The opposition bloc, led by Gadi Eisenkot, a former Israel Defense Forces military chief, has a modest lead in the polls. But the election has played out on Prime Minister Benjamin Netanyahu's terms.

The opposition bloc's main leaders have, in crucial ways, accepted Netanyahu's worldview, and even run to his right. Eisenkot has sworn his opposition to the formation of a Palestinian state and said he would end Hamas's rule of Gaza within 18 months, by military means if necessary. Yair Lapid said that Netanyahu has not gone far enough in bombing Iran's energy infrastructure.

Both Israelis and Palestinians are trapped in the Netanyahu paradigm.

Naftali Bennett called Turkey "the new Iran" and described Qatar as an enemy state. Avigdor Lieberman called for the dismantling of the Palestinian Authority. All of the bloc's main leaders, save the left-wing Yair Golan, have ruled out adding Arab-Israeli parties to their coalition. Netanyahu may lose, but only because his opponents so fully accepted his premises.

Most Israeli Jews now see the world the way Netanyahu has long seen it. That is Netanyahu's great victory. But it is matched by his great loss: Much of the world now sees Israel the way Gazans see it. In this, it is not only Netanyahu who has achieved much of what he sought but also Yahya Sinwar, the Hamas leader who planned Oct. 7 and was killed in 2024. Their successes have been, for their people, catastrophic.

To revisit what they sought, and what they received: Before Oct. 7, Netanyahu had spent years propping up Hamas using Qatari money. This was widely understood as a strategy to keep Palestinians divided and thwart international pressure on Israel to permit a Palestinian state.

The prevention of that state had long been one of Netanyahu's proudest accomplishments. "There will be no Palestinian state to the west of the Jordan River," he said in 2025. "For years I have prevented the creation of that terror state, against tremendous pressure, both domestic and from abroad. We have done this with determination, and with astute statesmanship. Moreover, we have doubled the Jewish settlement in Judea and Samaria, and we will continue on this path." Netanyahu's coalition partner Bezalel Smotrich has described Hamas as "an asset."

On Oct. 7, 2023, Sinwar's fighters swarmed into a sleeping Israel, murdered about 1,200 people and took 251 hostages. For Israel, this was traumatizing — the single worst day of Jewish death since the Holocaust — and Israel's response was overwhelming, as Sinwar must have known it would be. In the war that followed, Israel killed more than 74,000 Palestinians, of whom more than 21,000 were children, and reduced Gaza to rubble.

Sinwar had long been willing to trade Palestinian lives for political gain. Years earlier, Yuval Bitton, the Israeli intelligence officer who knew Sinwar best, asked him whether his goals were worth the loss of life they would inevitably demand. Sinwar's reply was unflinching. "We are ready to sacrifice 20,000, 30,000, 100,000," he said. With Netanyahu's relentless, brutal cooperation, that is exactly what Sinwar did.

Sinwar traded these lives to transform the way the world views both Israel and the Palestinians. The "Palestinian question," which had faded from geopolitical interest, is now a central cause worldwide. More than 150 countries, including Britain, France and Canada, now recognize a Palestinian state. There is no near-term chance of an accord between Israel and Saudi Arabia. Israel is credibly accused of genocide in the International Court of Justice, and it has already been convicted of genocide in global public opinion. A majority of young Americans and nearly 40 percent of American Jews believe Israel has committed genocide in Gaza — and, for the first time, a plurality of all Americans now sympathize more with the Palestinians than with the Israelis.

None of this was inevitable. After Oct. 7, there was an outpouring of global sympathy for Israel. President Joe Biden flew to Israel to embrace Netanyahu and grieve with its people. Germany lit the Brandenburg Gate with the Israeli flag. France projected a Star of David onto the Eiffel Tower. Australia illuminated the Sydney Opera House in Israel's national colors. More limited counterterrorism approaches would have allowed Israel to hunt Hamas's leaders without squandering the sympathy and horror the world then felt on Israel's behalf. Restraint would have kept the focus on Hamas's attack.

But Netanyahu wanted to risk more to achieve more. He flattened Gaza in search of a nebulous "total victory" over Hamas — a goal prioritized over the lives not just of Gazans but of the Israeli hostages. He took the opportunity to decapitate Hezbollah and ultimately re-invade parts of southern Lebanon, demolishing dozens of villages and displacing hundreds of thousands of people. And, ultimately, he achieved the dream that had animated him for decades: persuading America to join him in an attempt to destroy the Iranian regime.

In the months after Oct. 7, Netanyahu's political career looked to be finished. Three years later, he has achieved more of his geopolitical aims than seemed possible. And where has it gotten him, or Israel? For all the damage Israel has meted out against its enemies, the Iranian regime stands. Hezbollah stands. Hamas stands. And America's special relationship with Israel is drawing to its end.

Unflinching support for Israel is becoming anathema in the Democratic Party. Rahm Emanuel, whose father fought in Israel's war for independence, declared, "The days of taxpayers subsidizing Israel militarily, that's over." He flew to Tel Aviv to warn Israelis that "you have turned from being known for your technological prowess to being considered primarily a territorial pariah."

It is well known that Vice President JD Vance is far more skeptical of Israel than Trump is, and given the prominence of voices like Tucker Carlson and Megyn Kelly and now Nick Fuentes on the right, it seems unlikely that the Republican Party will back Israel in the future as it has in the past.

"Israel is entering diplomatic isolation," Netanyahu said in 2025. "We will have to deal with a closed economy. The world is dividing into blocs, and we are not part of any bloc."

"Catastrophic success" is a term that entered the American lexicon in 2004, after the initial victory America achieved in Iraq revealed itself to be a mounting disaster. It refers to getting more than you thought possible militarily and then realizing you have no way out of the strategic and political morass you have created. It applies exactly to both Sinwar's and Netanyahu's achievements.

The Palestinian people have more international sympathy, but they live in more misery and under more domination than before, facing an Israel that is ever more violently opposed to their self-determination and even to their existence.

The human losses in Gaza are incalculable and most of the territory remains under Israeli military control. Palestinians in the West Bank are beset by what, at this point, can be described only as a regime of terror. In a searing investigation built on thousands of testimonies, B'Tselem, the Israeli human rights group, described this campaign as "a comprehensive mechanism of elimination that works to dismantle the conditions for continued Palestinian existence in the West Bank, while deepening Jewish control and supremacy in an irreversible manner." The world is increasingly seeing this oppression and violence firsthand, as foreign journalists and politicians are being beaten by settlers and detained by the Israel Defense Forces.

Has all this made Israelis safe? It has certainly left them regionally dominant. But the world now sees Israel as a brutal aggressor. Israel is riven by terrible religious and political divides at home, it is losing many of its most productive citizens to an easier life outside its borders, and it is staring down a future in which it cannot count on unstinting American or European support and will likely face international isolation as an apartheid regime.

The very meaning of Israel has changed, as the country formed in the aftermath of genocide may be found responsible for genocide at the International Court of Justice. Just this weekend, Netanyahu suggested that Israel might need to turn to cryptocurrency to get around the international sanctions he expects in the future, triggering a rare rebuke from Israel's central bank, which warned that crypto cannot be used to evade sanctions. "We won the Middle East, but we lost the world," Ari Shavit, the Israeli political commentator, told me.

"Strong against Hamas" was Likud's slogan in the 2006 election. Likud's view of the world has long been proved by Hamas; Hamas's view of Israel has long been proved by Likud. The result is a trap from which neither Israelis nor Palestinians have been able to escape. If Israel's opposition bloc wins, it will win within this ruinous logic. To succeed, it will need to find a way to escape it.

Netanyahu could cling to power

KOPLOW, FROM PAGE 1

His message is not one of three years of unresolved wars and growing challenges. It is that Israel has won — and is on the way to even greater victories. In the picture he paints, Israel now controls a majority of Gaza with the consent of the international community; drove Hezbollah from southern Lebanon; contributed to the downfall of Bashar al-Assad in Syria, denying Iran its land bridge across the Levant; and most important, acted in concert with the United States to destroy Iranian nuclear sites and kill Iran's top leadership. In Mr. Netanyahu's world, these are unprecedented achievements that few thought possible and that only he could pull off.

For many Israelis, the message lands. For the first time in nearly two decades, rockets from Gaza are not terrorizing Israelis in southern Israel. Northern Israel is no longer suffering daily from Hezbollah missiles and drones. Israel has endured multiple ballistic and cruise missile barrages from Iran, but has struck back far harder and at enormous cost to Iran's nuclear program and military capabilities. The threat of the establishment of a Palestinian state that could serve as a launchpad for terrorist attacks inside of Israel appears farther away than ever. When Mr. Netanyahu argues that Israel is now safer and more secure than it has ever been, these Israeli voters nod along.

Mr. Netanyahu has also done his best to sow doubts about whether he and his government should be held responsible for Oct. 7. In a narrative that rhymes with a decade of right-wing American political discourse, Mr. Netanyahu's camp alleges there is a deep-state conspiracy that stretches from the military and the security services through the bureaucracy to the legal establishment. The darkest assertions are that these actors knew that Oct. 7 would happen but purposely kept him in the dark in order to ensure his downfall, while Mr. Netanyahu himself claims that Oct. 7 would have been averted had they waked him earlier.

By encouraging this chaos of disinformation, he is shoring up his political base by fueling distrust of elites, who allegedly control the intelligence and security apparatus. In doing so, he has not only blunted the enormous advantage that the opposition naturally had around responsibility for Oct. 7, but audaciously turned it on its head.

This election campaign has demonstrated Mr. Netanyahu's political skills to their fullest extent. For right-wing Israeli voters who have been in Mr. Netanyahu's camp for decades and believe his promises to increase Israel's strength, beat back pressures to create a Palestinian state and protect them from liberal elites, he appears to be delivering. Oct. 7 remains a devastating event, but they refuse to hang it around Mr. Netanyahu's neck or concede that Israel is losing more than it is winning.

Mr. Netanyahu still has an uphill climb ahead of him. No reputable polls put his party close to being able to form a new government on its own, and the opposition has pathways to taking power — by allying with Arab parties, which are eager to support anyone other than Mr. Netanyahu — that he does not.

But Mr. Netanyahu is the ultimate political survivor. If he lives to fight another day, nobody should be surprised that millions of Israelis remain in his corner.

MICHAEL J. KOPLOW *is the chief policy officer of the Israel Policy Forum and a senior fellow at the Shalom Hartman Institute of North America.*

America's warped mirror image in Brazil

WINTER, FROM PAGE 9

Nevertheless, Mr. Lula and his aides have accused the United States of continued interference, citing, for instance, a White House statement from September claiming that Mr. Lula's government has failed to confront organized crime groups.

Still, the Bolsonaros' Trumpian tactics would never have worked had it not been for deeper changes in Brazilian society. The first has been the extraordinary growth of the evangelical Christian community, which expanded to around 27 percent of Brazilians in 2022 from about 7 percent of Brazilians in the 1980s, providing what polls suggest is the most loyal base for the Bolsonaros' rallying cry of "God, country and family."

The second shift was, ironically, an indirect consequence of the prosperity of Mr. Lula's first two terms: The annual number of Brazilians traveling to the United States has almost tripled since 2000, fueling an enthusiasm for American culture that has extended well beyond politics. Many of Brazil's most popular musicians now perform in cowboy hats and bluejeans, while the National Football League began hosting annual games in Brazil, one of its fastest-growing global markets, in 2024.

The most important change: Fear of crime has overtaken pocketbook issues like unemployment and hunger as voters' top concern. This is true not only in Brazil but throughout much of Latin America, and is a major reason that right-of-center, generally Trump-aligned candidates have been cleaning up in the region's recent democratic elections. In the final weeks of his campaign, Flávio Bolsonaro has said the mega-prisons and other tactics of another key Trump ally in the region, President Nayib Bukele of El Salvador, are "not enough" — vowing to build room for another half a million prisoners in a country that already has the world's highest prison population after China and the United States.



AGUSTIN MARCARIAN/REUTERS

Flávio Bolsonaro on Sunday. He called for the election results to be annulled.

Brazil is hardly the only country whose politics have evolved in ways that might have been unrecognizable a generation ago. In the United States, rising inequality over the past 40 years means that roughly 70 percent of wealth is now concentrated among just 10 percent of the population, according to the World Inequality Lab — a ratio almost identical to that of Brazil.

Much has been made of the "americanização" of Brazilian politics. But Latin America, home to the world's biggest gap between rich and poor, has long been fertile ground for so-called caudillos, leaders who rise to power by blaming feckless, corrupt elites for their nation's troubles and promising easy solutions. Which raises the question: Who, precisely, is resembling whom?

BRIAN WINTER *is the editor in chief of Americas Quarterly.*



OPINION

What's the Matter With France?



MAIN STREET
By William McGurn

Marie Antoinette never said "Let them eat cake," but President Emmanuel Macron and his wife were filmed sitting in a private box at a Celine Dion concert in Nanterre the night before nationwide protests turned violent.

The protests are ostensibly driven by the high cost of living, young people's poor job prospects, and terrible public schools. The crowd that stormed the Bastille in 1789 did so because the prison-for-

It fancies itself the model of modernity yet is descending into atavistic violence.

tress symbolized the ancien régime. Today Louis Vuitton stores appear more resilient than the French government, with hammer-wielding and rock-throwing rioters failing to breach their showroom windows.

Donald Trump put it this way: "France is right now burning down because it opens its borders to people who hate it."

The U.S. president is right. France has opened its doors to hundreds of thousands of people who neither share French values nor aspire to. But admitting people who don't uphold French values is only half the problem. The other half is that the French themselves don't appear to believe in anything. This is particularly true in regard to religion, where the official state policy since 1905 has been *laïcité*. An extreme reaction to the once-prominent role of Catholicism in France, it forbids even the mildest form of state accommodation of religion.



BLOOMBERG

Protesters in Paris, Oct. 24.

Americans may be surprised to learn that many public expressions of God and faith we take for granted—invocations, displays, blessings, the "so help me God" of our courtroom oaths—would violate the French Constitution.

Which points to a conundrum of our age. In the secularist mind, religion is a premodern relic of a less enlightened time. But never does this way of thinking address a glaring contradiction: How is the U.S., the most modern and advanced country in the world, also one of the most religious?

The answer lies in how the American conception of freedom embraces not only the private practice but the public expression of one's faith. In the U.S., freedom of religion is as important as freedom of speech and thought. This breadth of freedom doesn't compute in the secular progressive mind, except as an obstacle.

In 2025 the U.S. ambassador to France, Charles Kushner, published an open letter to Mr. Macron in these pages saying that antisemitism had exploded in France since Hamas's Oct. 7, 2023, massacre and that France hadn't done enough to combat it.

The French responded by summoning Mr. Kushner to the Foreign Ministry and issuing a statement rejecting his accusation. The statement asserted that antisemitic acts were being addressed by a "total mobilization" of French authorities.

In addition to its other problems, France is undergoing a crisis of modernity in which its hostility to religion no longer looks enlightened but passé. The difficulty is that the French, and Europe, have replaced religion with nothing by making the question of truth a wholly private matter.

It's fair to ask whether Islam is compatible with modernity, particularly in light of the French difficulty in assimilating its Muslim population. But even if unassimilated Muslims are a problem, the bigger problem is that post-Enlightenment France (and to a larger degree Europe) is built on sand. Yet adherents to its vision believe that France, not America, is the model of modernity. It's hard for the center to hold absent a belief in truth.

We are all familiar with the symbols of modern France. There is Marianne, the woman who personifies the French Republic. The red, white and blue tricolor that was adopted as the national flag. "La Marseillaise," a war chant that became the national anthem.

Add to this one that emerges from a different patrimony: the rise of Notre-Dame Cathedral from the ashes of a devastating fire, exactly as the people wanted. Maybe the American model is a more liberal and workable order. And maybe France has been looking for modernity in all the wrong places.

Write to mcgurn@wsj.com.

The Common Ground for Lula and Trump



GLOBAL VIEW
By Walter Russell Mead

The earth moved in Brazil over the weekend, but not in the direction President Trump wanted.

President Luiz Inácio "Lula" da Silva pulled off an upset Sunday and won a fourth term. The octogenarian incumbent had been widely expected to lose, after trailing Sen. Flávio Bolsonaro in the first round of the election and lagging in polls.

As a result, the second most important and populous country in the Western Hemisphere won't be fully aligned with the Trump administration during its final two years. With right-wing leaders winning elections across Latin America in recent years, Team Trump was building a coalition of countries that would follow its lead on China policy, narco-trafficking and the Middle East. But with Canada, Mexico and now Brazil in the hands of leaders opposed to key elements of Mr. Trump's hemispheric vision, the White House will have to rethink.

Venezuela may be a particular sore spot. The removal of Nicolás Maduro brought back memories of earlier eras of U.S. meddling in the region. With opposition leader María Corina Machado returning to the country Sunday to rally her followers and the government of America-backed Delcy Rodríguez losing popularity, Venezuela's political situation is growing more complex. Coordinating policy with Brasília would have been easier if Mr. Bolsonaro had gotten the big job.

All is not lost for Team Trump. On key points, like boosting production from Brazil's enormous offshore oil and gas fields, the Trump administration and Lula's government see eye-to-eye. Neither Washington nor Brasília wants Venezuela to descend into chaos. And Brazil wants to bring its critical minerals to world markets, which would help break China's stranglehold on vital resources. But in other ways, Lula is more likely to join Canadian Prime Minister Mark Carney in forming coalitions among middle powers than to help Mr. Trump make America great again.

Brazil wasn't the only country where a Trump ally sustained an election defeat over the weekend. Longtime Serbian leader Aleksandar Vucic stood out in Europe for his interest in using economic incentives to build ties with the Trump inner circle. Like Viktor Orbán last spring, Mr. Vucic, who conceded Sunday, learned that warm relations with Mr. Trump's White House don't always impress the voters at home.

For the beleaguered Trump administration, setbacks in Serbia and Brazil raise the specter of a grim winter. If the Trump-endorsed Israeli Prime Minister Benjamin Netanyahu falters at the polls and American Republicans get hammered in next week's midterms, the perception that Mr. Trump's power is waning could start to congeal. For a presidency whose actual power depends so heavily on the appearance of power, the consolidation of the belief that the world has passed Peak Trump would be deeply damaging.

They can agree on producing more fuel and protecting Venezuela from chaos.

The Brazilian election story may not be over. After his loss in 2022, Sen. Bolsonaro's father, then-President Jair Bolsonaro, encouraged supporters to mount what many saw as a larger, more threatening version of the Jan. 6, 2021, riots on Capitol Hill.

Could this history repeat? Flávio Bolsonaro has refused to recognize the result and says he will contest it in the courts. He cited procedural irregularities and alleged bias by Supreme Court Justice Cristiano Zanin, who ordered polls to be kept open for two more hours across the country in response to a request from the Lula campaign. A similar extension request by the Bolsonaro campaign to another court wasn't answered. Since Justice Zanin was Lula's defense attorney during his criminal trial and imprisonment and is married to the daughter of one of the president's close associates, many Bolsonaro supporters are likely to sympathize. Some may take to the streets to express those sympathies.

Claims of fraud in Brazil will resonate in a U.S. administration still angry over what it claims was the "stolen" U.S. election of 2020. The temptation to throw Washington's weight behind those protesting the outcome will be real. It should be resisted.

The perception of American interference is more likely to unite Brazilians behind Lula than to produce any benefit for the U.S. The wiser course is to work with his government to check Chinese influence in the hemisphere and to build, carefully and gingerly, on the shared interest in a stable Venezuela.

Time is on Washington's side in Brazil. Despite Lula's extraordinary come-from-behind victory in the presidential election, Brazilians are moving to the right on social and economic issues. Foreign interference in Brazil's political process is more likely to strengthen the left than to weaken it. In any case, the Trump administration has enough on its plate without turning the Brazilian election into another world crisis.

Even a presidency as disruptive as Mr. Trump's can benefit from a little calm.

Slow and Steady Can Defeat Iran

By Michael O'Hanlon

Whatever the wisdom of President Trump's decision to attack Iran, he has found the least bad military strategy for the war going forward: blockading the Strait of Hormuz while escorting friendly shipping through. This strategy has kept global oil prices from going through the roof while squeezing Iran harder.

Unless Iran escalates first, Mr. Trump should stick with it. Time is on America's side, and costs, while high, are limited. A renewed or intensified air war would be a giant and fraught roll of the dice.

Air strikes have achieved impressive results while also demonstrating clear limits. Iran's nuclear program was stopped in its tracks in one day last year. Supreme Leader Ayatollah Ali Khamenei and several other top leaders were killed just as fast on Feb. 28. Iran's navy has mostly found its way to Davy Jones's locker. But more than 30,000 additional U.S. combat sorties, including strike missions attacking some 13,000 aim points, have been less effective against other targets. Perhaps one-third to two-thirds of Iran's missile force was put out of action, yet some has likely been rebuilt. Drone production continues apace, even as U.S. regional allies remain vulnerable to Iranian attack.

Time is on America's side, and a renewed or intensified air war would be a mistake.

Iran's deep regime bench has largely allowed for replacement of top echelons of lost leadership, hunkered down in places hard for American or Israeli air power to target. Loyalist soldiers and militias retain ample capacity to mow down domestic protesters. If the U.S. and Israel attack Iranian energy and electricity infrastructure, that would cause real pain—but more to the people than the regime.

In this situation, whatever Mr. Trump's understandable frustrations, and likely GOP losses in coming midterms, the best U.S. strategy is to keep doing what we are doing now militarily, while thinking through where we can be somewhat flexible in negotiations with Iran someday—maybe next year, maybe in 2028, maybe not until 2029. There are three reasons for patience:

First, as Iranian oil inventories on ships around the world diminish, overland supply routes are pressured, and other sources of Iranian regime income are gradually curtailed, it is increasingly likely that time is on our side in the economic dimension of the war, even if the global pain from the conflict is significant. One need not support the decision to start the war to reach that conclusion. Iranian leaders aren't like the Taliban; they like money, pomp and power. Today they are hurting.

Second, a renewed U.S.-Israeli air war would face extremely uncertain prospects given that available target sets have already been heavily attacked and that air campaigns rarely achieve decisive results.

Third, a major bombing campaign would run a near-certain risk of intensified Iranian retaliation, in the region and beyond, further depleting U.S. missile defense interceptor inventories while running the risk of much higher fuel prices and higher casualties, perhaps even on the home front.

Sometimes in life the most important choices are between bad options and resisting the temptation to swing for the fences. The U.S. overall isn't in a bad place on the Iran war, compared with other plausible scenarios—even if the war might have been a dubious idea in the first place. Caution and patience should guide us going forward.

Mr. O'Hanlon is director of research for the Brookings Institution's Foreign Policy Program and author of "To Dare Mighty Things: U.S. Defense Strategy Since the Revolution."

BOOKSHELF | By Dave Shiflett

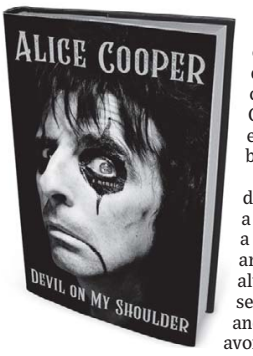
A Rocker Who Saw the Light

Devil on My Shoulder

By Alice Cooper with Daniel Richler
Da Capo, 464 pages, $32.50

Alice Cooper, a master of music, marketing and mascara, has updated the Prodigal Son saga. The legendary shock rocker's version, told in deep detail in "Devil on My Shoulder" (with assistance from the pop-music writer Daniel Richler), is actually more interesting than the familiar parable from the Gospel of Luke—and lots longer.

The biblical prodigal simply left home, blew all his money and took a job as a swineherd before returning to an understanding father. Vincent Furnier moved to Los Angeles, started wearing dresses and executing baby dolls on stage (topping things off with a theatrical trip to the guillotine), and eventually toured the world serenading impressionable ears with "I'm Eighteen" (1970), "Halo of Flies" (1971),



"Under My Wheels" (1971), "School's Out" (1972), and other odes to a highly heterodox lifestyle. He officially changed his name to Alice Cooper in 1974. He also drank enough alcohol to float Noah's boat, and Herod's too.

Then he saw the light. These days he's a religious gent and a shepherd to drifting youth, a golf addict, sober as a mullah, and insists his critics have always taken him far too seriously. He loves America and capitalism as much as he avoids their showboating critics. "When I see people burning flags or occupying Wall Street I instinctively march in the other direction." His overall message is deeply Churchillian: Never Give Up.

It's not quite the greatest story ever told but it does have its moments.

Born in 1948, young Vincent displayed an early passion for track and field at his Arizona high school. He had a religious streak encouraged by his mother and father, the latter a preacher of the gospel to peyote-friendly Native Americans. Vincent's musical dreams were traditional: He wanted to meet girls and make lots of money. Los Angeles beckoned.

In Los Angeles, his talent for promotion caught the eye of Frank Zappa, a cage-rattler first class, who signed Alice Cooper (at the time it was the name of the band Vincent fronted) to a three-record contract after a brief audition. "Stop, stop!" Zappa screamed. "I'll sign you, fine! Just stop playing."

The band's ascent might be seen as inspirational, if not providential. Early on, the ferocious fivesome so turned off audiences that it famously emptied one venue in less than 10 minutes. Its perseverance, when considered in relation to its musical talent, seems heroic—slightly psychotic, even. Glory arrived in 1970 with the release of "I'm Eighteen." A Missouri DJ named Rusty Sharpe, real name Rush Limbaugh, was one of the first to put the single into heavy rotation. Sharpe was far kinder than Billboard, which called Alice Cooper "a band with a sound as hard as Hitler and cancerous as the cultural confusion it mirrors to excess." Playboy panned the act as a "second to fifth rate talent."

What do critics know? By 1973 Alice Cooper and Mammon were becoming close associates. The band commanded the Houston Astrodome's highest-ever ticket price—$7.50—and attracted hordes of fans worldwide, including this writer, to whom fate assigned a spot in the security pit, a buffer between the band and its fans, during a Virginia performance. I happened to have brought along a rubber Richard Nixon mask (a popular fashion accessory of the day), which was tossed onstage midperformance and promptly worn by the singer. Tricky Dick never looked or sounded better. Yet the end was near. The band fell apart in 1974, though the Alice Cooper brand lives on as a solo act.

Religious in his youth, Alice Cooper returned to faith when he got sober. These days his addiction is not drugs or alcohol but golf.

There's more to this memoir than music, artistic struggle, serial inebriation and snakes (Mr. Cooper is especially fond of boa constrictors), including youthful recollections of shooting tarantulas with a BB gun. Many great names are dropped, including drinking partners John Lennon, Ringo Starr and Harry Nilsson, along with Jack Benny, Frank Sinatra and Groucho Marx, who brought Mae West and Fred Astaire to a few performances, which they considered "loud, modern-day vaudeville."

The author also gives ample ink to his significant host of personal demons. By his count he downed a case of Budweiser daily for a decade or so, augmented with copious whiskey. After a successful detox he was introduced to cocaine, we are told, by Elton John's collaborator, Bernie Taupin, which morphed into a freebase cocaine habit that left the always slender Mr. Cooper looking like he'd been vacationing in a concentration camp. It also nearly destroyed his marriage.

On the bright side, his mid-1980s drug decrescendo landed him fully back in the religious camp. "If you don't help me, I'm gonna die," he told his higher power. This submission, he tells us, was the "ultimate loss of control and the sanest thing I ever did." He had other help, including a steadfast, church-going wife, and golf, "an addiction that wasn't going to kill me." As one point he played 36 holes a day.

Peace and harmony resulted. Mr. Cooper, now 78, has been sober for more than 40 years, married for more than 50, continues to tour—nearly 100 dates in 2025—and insists that critics of his onstage antics need to find something real to worry about. "You just can't take it that seriously," he insists. "It's only rock and roll, right?"

True enough, though at times Mr. Cooper seems to consider himself more than a mere rocker. When a critic called him "a scapegoat for everybody's guilts and repressions," he proclaimed: "That's me all over!" He also insists that "God is using Alice Cooper the same way he used Paul"—as a former "scourge" repurposed for higher duty.

All of which may qualify as a touch of self-adoration, yet his Solid Rock Teen Centers, which encourage children to pursue their musical dreams (on Mr. Cooper's dime), are worthy of a celestial pat on the back. His heathen to holy transformation also brings to mind words from another cultural oracle of the late '60s: "You've come a long way, baby."

Mr. Shiflett posts his original music and writing at Daveshiflett.com.

OPINION

REVIEW & OUTLOOK

Anthropic's Big IPO Gamble

Anthropic on Monday rolled out the prospectus for its long-awaited initial public offering, and reading all the financial, regulatory and legal risks makes us wonder if it's trying to scare investors.

There's never been a public IPO like Anthropic, with such a promising but also risky technology. The paradox is laced through its more than 300-page prospectus as it repeatedly says it can benefit humanity and solve humanity's biggest problems. Yet it also says AI may pose "catastrophic or existential risks to humanity."

The company says it could save humanity or destroy it. Investors, place your bets.

This has been CEO Dario Amodei's public contradiction, and now that he's selling shares perhaps he could make up his mind. As a friend quips, perhaps he should ask Claude.

* * *

Beyond this small existential matter, there are other risks. The largest is whether Anthropic will ever generate the revenue to cover its soaring costs to stay at the AI frontier. Anthropic reported $16.3 billion in revenue in the first half of this year, up from $1.2 billion in the same period last year.

Anthropic also says its customers include more than half of the Fortune 500 companies, including the 10 largest internet firms, nine of the 10 largest pharma companies, the 10 largest banks, nine of the 10 largest semiconductor companies and eight of the 10 largest healthcare firms.

This is all impressive, yet it says a "significant portion of our customer base consists of startups and technology-oriented enterprises that may be more sensitive to adverse macroeconomic conditions." Beware a major economic slowdown.

The prospectus names Google and OpenAI as chief competitors on the frontier, while open-weight and open-source AI models "may capture a portion of the market for certain use cases, which could exert pricing pressure on our offerings or lead certain customers to adopt open-source alternatives for those use cases."

Large banks and infrastructure providers may be reluctant to use Chinese models because of potential security risks. But Nvidia and Meta are pushing their own open-weight models, which could be attractive because of lower costs. Companies needn't worry about sharing proprietary data if they use open models.

A recent report found that open models account for nearly 60% of AI use in the U.S., up from 10% a year ago. If open-weight models proliferate, Anthropic could struggle to pay for its computing build-out. Anthropic estimates it has a minimum of $417 billion in future payments, mainly owed for computing and infrastructure.

Then there are regulatory risks. The prospectus says that "recurring narratives concerning the potential adverse societal impacts of AI, including that AI may displace or eliminate jobs, may be misused or otherwise cause harm, and may pose catastrophic or existential risks to humanity" could hurt its reputation and put off potential customers.

No mention that Mr. Amodei is a leading promoter of such narratives. The political risk also isn't trivial. In June the Commerce Department imposed worldwide export restrictions on Anthropic's Fable 5 and Mythos 5 models, which in effect forced the company to disable them.

The government restrictions were later lifted, but "similar export controls could recur, could remain in place longer, or could extend to additional models or capabilities," the company warns. It omits that the risk of Washington expanding political control over AI will increase if Democrats win the White House in 2028.

In an understatement of the modern age, Anthropic says "we are subject to complex and evolving laws, regulations, and other legal obligations related to privacy and data protection." Chinese AI labs face few of these barriers.

Becoming a public company will increase Anthropic's legal risks. By now Mr. Amodei must know that anything he says can and will be used against him by regulators and the plaintiff bar. If an Anthropic agent causes damage, the tort and securities bars will pounce.

On Friday the owners of Elvis Presley's music sued Anthropic, alleging it trained its models on more than 200 of his songs without permission. They are seeking more than $41 million in damages. "Costs of defending against such litigation, regardless of merit, are considerable," the prospectus says. Yes they are.

* * *

Given such enormous risks, why is Anthropic going public now? Our guess is it's trying to take advantage of the AI boom to let employees with stock options and early investors cash out before its edge erodes—or before more risks bite.

One underplayed hint of potential trouble is Anthropic's insistence on its "public benefit purpose," which includes ensuring "the hardest problems facing humanity are not left to market forces alone to solve." That's more or less an admission that Anthropic will continue advocating for a bigger government role in controlling AI. Investors and taxpayers, take heed.

Obama Goes Socialist, Scorns Cheesecake

President Obama has delivered another condescending classic. Campaigning for Democrats in Ohio this weekend, he said that President Trump's redecorations have the White House "looking like Saddam Hussein opened a Cheesecake Factory." The same day, Mr. Obama endorsed a socialist as Florida's next U.S. Senator.

Making fun of chain restaurants is quite an angle for Democrats, who keep insisting that they haven't forgotten the working man in Middle America. The Cheesecake Factory has a couple of hundred locations, the company says, so it must be doing something deliciously right. But to all of those diners in Cleveland, Grand Rapids, and beyond, here's Mr. Obama's message: How déclassé.

Meantime, instead of resisting the socialist takeover of the Democratic Party, Mr. Obama is throwing in with it. On Saturday he endorsed the Senate candidacy in Florida of state Rep. Angie Nixon, who won her primary in an upset despite—or because of?—her radical socialist views. She is campaigning on free childcare, a national rent freeze, and a 5% wealth tax to fund "direct payments to households earning under $150,000 a year."

Yes, Ms. Nixon is explicitly running on having the federal government seize money from wealthy people so it can redistribute the loot. This isn't bashful socialism, and it would be economically destructive, not that Mr. Obama objects. "Real change starts when regular folks stand up for what's right," he said in an endorsement video. "Angie has spent her career standing up for you."

There are no red states and blue states, Mr. Obama once said, using that rhetoric as cover for a progressive agenda. But all-out socialism? As a Democratic elder, not to mention the party's last popular President, he could use his influence to point in a more productive direction. It's revealing about his party's current state of mind that he isn't.

Markets Don't Vote for Lula

Latin America's political right has been cleaning up at the ballot box for three years, but on Sunday it suffered a setback in Brazil. Leftist President Luiz Inácio "Lula" da Silva of the Workers' Party defeated Senator Flávio Bolsonaro of the conservative Liberal Party 51.8% to 48.2%.

Brazil's stocks, bonds and currency plunge after the socialist wins.

Mr. Bolsonaro led in the first voting round, and the socialist's comeback victory surprised markets—not least because Brazil's $2.6 trillion economy is sputtering and wages aren't keeping up with inflation. But Lula has won a fourth term, and maybe there's justice in his victory. He now has to clean up the mess he inherits from himself when his new term begins in January.

Brazil's main stock index fell 10% at the opening Monday and trading was halted. When it resumed the sell off continued. It closed down nearly 14%. State-owned oil company Petrobras ADRs lost 14% and Itaú Unibanco ADRs fell 20%. The *real* lost 8.7% against the dollar. Brazil's treasury canceled government bond auctions scheduled for this week.

Brazilian GDP grew a mere 2.3% in 2025 and this year may not hit 2%. That's not enough to reduce poverty while the rest of the world runs ahead. The Workers' Party has held the presidency for nearly 18 of the last 24 years. In that time 14 countries have overtaken Brazil in per capita GDP, including the Dominican Republic, Guyana and Thailand.

A gusher of government spending after the first round of voting is a clue to how Lula hung on. Brazil will end the year with a fiscal deficit close to 10% of GDP, which means deficits will exceed 8% each of his last four years. Public debt is above 82% of GDP and rising.

The memory of hyperinflation that reached quadruple digits in the 1990s still haunts the public, and loose fiscal policy has forced the central bank to raise overnight interest rates to 13.75%. As servicing debt grows more expensive, Brazil is caught in a cycle of rising deficits and borrowing. An adjustment, as Goldman Sachs put it last week, "is urgently needed." It could be painful.

There's also a rule-of-law problem caused by a Supreme Court stacked with Lula allies who haven't hesitated to rule in his favor. On Sunday Justice Cristiano Zanin, Lula's former lawyer, extended voting for two hours at the request of the Lula campaign.

He made the decision unilaterally as a justice of the high court but the electoral tribunal went along. This has cast doubt on the legitimacy of Lula's victory. Demands for an explanation may go unanswered, but investors can see the high court's arbitrary use of power.

The opposition did well in this year's election in governor's races, and the Liberal Party will have a plurality in both legislative chambers. But party discipline in Brasilia is weak and ambitious members of Congress are famous for cutting deals for themselves. In the next four years Lula is expected to nominate up to four new Supreme Court members, and public hope that the Senate would demand the court follow the constitution is already fading.

That leaves the job of enforcing institutional rules to the markets. On Monday they issued a decisive early verdict.

LETTERS TO THE EDITOR

A True Crisis at the Psychological Association

I was both sad and glad to see Colin Wright and Andrew Hartz's op-ed "The Inmates Run the Asylum at the Psychological Association" (Oct. 21). Sad because it's spot-on about the decline of the American Psychological Association and glad that this decline is receiving the publicity it merits.

I am a member of the American Psychological Association. In 1947 the APA adopted what was called the Boulder model of psychology, emphasizing that both science and clinical practice should inform the discipline, so patients in need could receive effective and ethical treatments. Psychologists held themselves to high standards of ethics in researching and implementing interventions in the decades that the Boulder Model held sway.

In recent years the APA has moved away from the Boulder model and toward a pastiche of political activism leavened with woke balderdash. This in turn has opened the door to all sorts of prejudices, chiefly antisemitism as the discipline now follows the basest trends in our society.

It will take strong measures to affect the course of this organization, and the possible removal of APA's accreditation privileges may be a good start. In the interim, anyone seeking assistance from a psychologist trained in recent years should ask probing questions about his training and ideology. Getting competent psychological help is too important to be left to the ideologues now running the APA and their students brainwashed by them.

DANIEL H. TRIGOBOFF
Williamsville, N.Y.

Mr. Trigoboff is a retired clinical psychologist.

As president of APA Division 39, the Society for Psychoanalysis and Psychoanalytic Psychology, I take issue with the characterization of our organization. A core tenet of psychoanalysis is the freedom to speak, give language to difficult emotions and experiences, and examine what is difficult to acknowledge. It emerged from a history of marginalization and oppression, particularly the persecution of Jews. The authors' characterization of our conference reflects biased assumptions about what belongs in psychological scholarship.

The authors suggest psychotherapy should be confined to the consulting room. This is a fallacy. Patients are affected by the systems in which they live and may be particularly vulnerable to the harms those systems produce. Therapists must attend to power dynamics within and beyond the consulting room.

Our histories and assumptions shape our perspectives. Acknowledging subjectivity doesn't mean abandoning rigor; it means examining our biases. Research and practice are strengthened when we examine how our perspectives shape the questions we ask, the knowledge we produce and the conclusions we draw.

DANA CHARATAN, PSY.D.
Boulder, Colo.

A Majority Isn't a Blank Check in California

Your editorial "California's Wealth Tax Boomerang" (Oct. 22) warns that Proposition 40 could leave California with less revenue rather than more. A recent Manhattan Institute survey of 1,000 likely voters suggests that Californians are skeptical themselves. They oppose the proposed billionaire wealth tax by 50% to 35%. Only half of Democrats support it. Traders on the prediction market Kalshi also appear doubtful, putting the probability that the tax takes effect below 20%.

The broader appetite for fiscal accountability is substantial, too. Seventy-one percent are concerned about waste, fraud and abuse in California's welfare programs. By 53% to 32%, voters prioritize cracking down on those problems over making benefits easier to obtain. Fifty-six percent consider California less business-friendly than other states; only 14% say it is more.

Nearly two-thirds also support limiting public-sector union power if doing so would make it easier to reward good employees, discipline poor performers and deliver better services at lower cost. That includes a majority of Democrats.

Yet the same survey gives the Democratic gubernatorial nominee a 17-point lead. That is California's central contradiction: Voters remain loyal to the party in power while rejecting important elements of its governing agenda. Democratic electoral dominance shouldn't be mistaken for permission to keep taxing and spending. There is a constituency for accountable government. What's missing is a durable coalition willing to deliver it.

JESSE ARM
Manhattan Institute
Washington

Immigration Enforcement Hurts the Economy

Having practiced immigration law for 50-plus years, I have seen firsthand how policy disconnects hit the real economy ("Immigration Raids Hit Housing Market," U.S. News, Oct. 19). Ignoring moral debates, the financial cost of current Immigration and Customs Enforcement tactics against long-term, noncriminal immigrant family members is arriving immediately in grocery aisles, emergency rooms, construction sites, and family budgets.

When work authorizations expire, permit extensions languish unprocessed, longtime workers are detained and supply shocks cascade across the economy. Farms lose harvesters, hospitals lose aides, builders delay projects and small businesses cut capacity. Consumers pay through higher prices and diminished services. Beyond the immediate trauma inflicted on U.S.-citizen children, taxpayers will shoulder significant state and local social-safety-net costs as household incomes vanish overnight.

Highlighting these supply constraints isn't an argument against enforcement; it is an argument against ignoring economic realities. For decades, federal policy has signaled "keep out" at the border while the market signaled "help wanted." Congress has consistently failed to align legal labor supply with actual economic demand. Removing essential labor without functional legal alternatives is not order. It is manufactured scarcity, and every American consumer will now begin paying the price.

E. VANCE WINNINGHAM
Oklahoma City

California in the Water Wars

I agree with Peter Volny that California needs to develop desalination plants ("What Can Be Done About the Colorado River?," Letters, Oct. 21).

But California can also build more reservoirs and stop sending freshwater out to sea in an attempt to save smelt and insects. Good snow years in the Sierra Mountains shouldn't go to waste. The combination of reservoirs and desalination plants can heal the Southwest of perpetual drought, and California will probably be able to sell excess water to Arizona, Nevada and Northern Mexico. The time has come for the denial to stop concerning water in the West.

JASON OLIPHANT
Chatsworth, Calif.

Our Test of Naval Endurance

Miad Maleki's informed analysis of Iran's vulnerability perhaps has a fatal assumption ("A Buyout for Iran's 'Shadow Fleet,' " op-ed, Oct. 21). Can the U.S. sustain the blockade? The proven sea-power adage of three ships committed for every one engaged on a foreign station poses a severe burden.

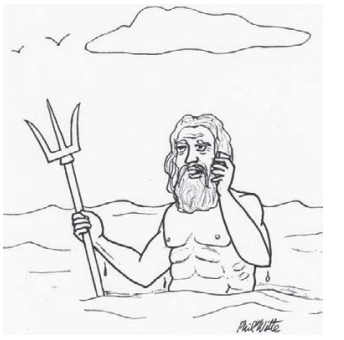
The U.S. Navy is already stretched thin by worldwide responsibilities. Strong winds and dust can interfere with equipment and visibility. Automated systems can mislead people and bureaucrats who underestimate the sea and fail to understand the real dangers. One might wonder if America is up for such an extensive challenge.

CAPT. RAYMOND J. BROWN, USCG (RET.)
Londonderry, N.H.

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Pepper ... And Salt

THE WALL STREET JOURNAL



"No, this is Neptune, the god. You want Neptune the planet."

OPINION

The Fed Needs Better Models

By David Malpass

The Federal Reserve's outdated economic models and board structure are pushing it toward interest-rate increases that would hurt affordability and small businesses without curbing inflation. This approach risks keeping bond yields and mortgage rates higher than necessary while waiting too long to cut rates. Instead, the Fed should consider broadening its models to include the value of the dollar as a key factor in price stability, which would help deliver low inflation, fast growth and dollar dominance.

Inflation regularly misses its target. Chairman Kevin Warsh addressed the data part of this problem in an Oct. 16 speech in Bangkok: "It's really lag data, it's about what happened. . . . We torture data with old-fashioned models to try to find out what's underlying inflation trends. Not so long from now, it won't be torture. We will have access at the fingertips of central banks to all the information in the world." Distinguishing between real-time data and outdated information will "fundamentally change the conduct of monetary policy," he said.



MARK SCHIEFELBEIN/ASSOCIATED PRESS

Chairman Kevin Warsh

The central bank can improve forecasts by including the value of the dollar in its modeling.

Better data and analytical tools will help, but the Fed faces larger problems. Its old-fashioned models exclude the dollar even though its value significantly affects inflation and price stability. The models also assume that faster growth and wage gains cause inflation and that higher rates are the best tool to slow it.

It is hard to see how. Even with better data, inflation is a flawed guide to setting rates. It depends on factors beyond the Fed's control, such as gasoline and diesel prices, and on liquidity in the economy from asset-price gains. Inflation also depends on the dollar and external supply factors such as energy production, deregulation, wage growth, tariffs, innovation, tax cuts and China's pricing decisions.

Perhaps the biggest problem with the inflation indicators is that bonds pay interest based on the agreed coupon, not inflation. Targeting inflation misses the point that investors in U.S. Treasurys receive fixed-dollar payments and are highly sensitive to the dollar's purchasing power. If investors had confidence in the dollar's long-term value or knew the Fed included the dollar in its rate-setting models, yields would be lower.

Further rate increases aren't likely to be effective against the current inflation. Higher rates can't produce additional diesel or semiconductors or resolve other supply constraints. They can suppress spending and hiring, but at a high cost to the investment and growth needed to increase production. Unnecessarily high interest rates worsen inequality because the wealthy keep consuming and those with savings earn a higher return at the expense of borrowers seeking to invest and produce. The heaviest burden falls on the drivers of growth—small businesses, new workers and home buyers.

The September interest rate increase was the highest starting point for a rate-hiking cycle since the Fed hiked rates from 4.75% in June 1999 to a high of 6.5% in May 2000. That pushed the dollar into the stratosphere, which harmed manufacturing jobs, deepened the Asian debt crisis, and punctured the dot-com bubble. Having overshot, the Fed then cut rates to 1% in 2003—a costly seesaw.

The Fed's September projections reveal a continuing reliance on the same output-gap model and labor-market indicators. Its forecasts last month warn of growth above potential through 2028, inflation above the 2% target into 2029 and unemployment below normal through that year.

These models may cause the Fed to set rates higher than would be necessary if it included prices in its models. Robert E. Hall and Michael Woodford's receiving this year's Nobel Prize in economics underscores the need to revise the macroeconomic framework when the evidence shows it can be improved. Their innovations were important, but monetary policy requires more upgrades to reflect today's environment.

As the Fed takes advantage of advanced price-monitoring technology, it should consider incorporating gold, commodity and currency prices in its rate-setting models. They provide useful signals about monetary conditions because they trade in real time and reflect changes in the dollar's value. The dollar has strengthened since President Trump's Jan. 30 announcement naming Mr. Warsh as Fed chair, while gold is down 25% from its January peak. These factors should be considered in setting rates.

Bond markets are pricing in painfully high interest rates for the foreseeable future because of the Fed's models. Hence the rise in bond yields and mortgage rates contributing to losses in the equity markets. Higher-than-necessary rates will also add significantly to the U.S. budget deficit given the size and short maturity of the national debt.

A final point: Including prices and viewing growth as a positive factor in the Fed's models would increase investor confidence in the dollar's value and attractive returns on Treasurys. Linking the Fed's price-stability mandate to a stable dollar would also solidify the dollar's market share in the rapid growth of digital currencies and stablecoins. Dollar stability would, in turn, intensify pressure on China's investment portfolio, which is underweight the dollar and overweight zero-yielding gold.

Mr. Malpass served as an undersecretary of the Treasury (2017-19) and president of the World Bank (2019-23). He is vice chairman of American Global Strategies.

Regulate Polls, Not Prediction Markets

By Harry Crane And Koleman Strumpf

Americans have been fascinated with forecasting elections since George Washington's time. For over a century they turned to predictions from betting markets, the largest one located just outside the New York Stock Exchange. While these markets were widely perceived never to be wrong, there was often a concern that they could be manipulated to sway voters or that they would give bettors an incentive to influence the election directly.

These concerns have returned with the rise of online prediction markets like Kalshi and Polymarket. There has been a push to regulate or even ban them, with the loudest voices from state regulators, interest groups such as Better Markets, and politicians such as Sens. Elizabeth Warren and John Curtis.

Missing is any evidence that prediction markets diminish election integrity. To our knowledge there is no such example. We recently studied prediction market traders from 1900 to 2024 and found that these markets are resilient to political bias despite skewed demographics among participants. And anyone who has the means to affect important elections can make far more money trading in traditional securities or derivatives.

There's no evidence that betting harms election integrity. Fake surveys have done so this year.

Curiously, polls, the other leading forecaster of elections, haven't received anything like this level of scrutiny. Yet unlike prediction markets, we now have two examples of fraudulent polls from the current election cycle.

Over the summer the pollster Median Strategies was found to be fabricating polls, most prominently overstating the chances of a far-left candidate in the Democratic primary for Wisconsin governor. The firm said it was conducting a "short-term social experiment" to examine "how purported polling information could enter and spread through the political information ecosystem without independent verification."

Last week Wedgewood Polls admitted most of its polling numbers were also an "experiment." This one had at least one documented effect in changing election outcomes. State Sen. Mallory McMorrow dropped out of Michigan's Democratic U.S. Senate primary when Wedgewood's fake numbers showed her lagging. This led donations to dry up and demoralized staffers. "It killed us," she wrote on X. Abdul El-Sayed won the nomination and is in a tight race for the seat. Wedgewood's phony poll may be one reason why.

Not only politicians are affected. The New York Times used Wedgewood numbers in its poll aggregates, as did the influential polling analyst Nate Silver. The fake polls seemed to favor Democrats, and particularly left-leaning ones: They claimed the Republicans had a very narrow lead in the Mississippi Senate election, which prediction markets score as 90% likely to be a GOP win. Wedgewood's polls have shaped narratives about the midterm elections, donor behaviors, and voter perceptions and perhaps even votes. All this damage from a polling company only started over the summer.

Such shenanigans are nothing new: In 2006 two defendants pleaded guilty to federal fraud charges after being charged with defrauding campaigns that hired them to do internal polling.

Fake pollsters, unlike prediction markets, have a smoking gun of corrupting elections. They have managed to trick an important newspaper and a leading polling expert into using their phony numbers. The problem could get worse, as malicious actors see the ease and power of using polls to distort elections.

The polling industry has been unable to address these issues on its own, so lawmakers should consider imposing regulations on polls. Require their numbers to be audited. Make sure they have no undisclosed ties to vested interests. Impose financial penalties for deceptive practices. The many politicians and advocates who have made such demands from prediction markets should turn their attention to the only forecasts that have proved to damage election integrity. It is the least we can do to protect our democracy.

Mr. Crane is a professor of statistics at Rutgers University. Mr. Strumpf is a professor of economics at Wake Forest University.

These Republicans Could Help the GOP by Losing



EDITOR AT LARGE
By Gerard Baker

James Talarico and Amy Acton would surely be terrible political choices for their respective states.

The Democratic nominee for Senate in Texas may not actually believe in six sexes, that God is "nonbinary," or any of the other crackpot things he has said. But whatever we make of Mr. Talarico's heterodoxies, he has depressingly orthodox ideas on taxes and handouts, education, immigration and most other matters.

Ms. Acton's record is worse. As Ohio's health director during Covid, she evinced a familiar blind faith in the rigid authority of government to dictate the way we live. The Democratic nominee for governor has predictably left-wing views on just about everything else.

But for the good of their states, the country and the Republican Party, I hope they win next Tuesday.

It's a bold move to urge a vote for candidates whose policies you think are wrong. But sometimes candidates with better policy prescriptions lose the voters' trust through their own character.

To say that Ken Paxton, Mr. Talarico's Republican opponent, is ethically challenged would be an understatement on a par with saying Jack Kevorkian wasn't the kind of doctor you wanted if you were elderly and feeling a little under the weather. The Texas attorney general was once reported to the Federal Bureau of Investigation by his own staff for alleged corruption and was impeached by the Republican-dominated Texas House. (Prosecutors declined to file charges, and the state Senate acquitted Mr. Paxton.)

In Ohio, Vivek Ramaswamy, in the final days of his campaign for governor, has completed the last stage of his career descent from dynamic capitalist through thoughtful conservative scourge of progressive lunacy to craven Trump sycophant and, finally, to shameless cynic who will do anything to get ahead. A man who enlists to his cause the testimony of a woman who sided with the monster charged with abusing her own child has answered the question of his fitness for office.

The struggle between character and purpose when making political choices is often fierce. Few great statesmen were saints. Both parties have sinners. But these candidates' demonstrated unfitness for office crystallizes neatly the balance of risks for many conservatives and quite a few independents as we decide how to vote next week.

Do we express our disgust with the state of the modern Republican Party and risk lending new life to a Democratic Party filling up with dangerous people, bad ideas and terrible plans? Or do we vote against that malignity and risk letting our choice be an endorsement of a Republican Party that has forfeited just about the last shred of trust we have in it?

Fortunately, the choice isn't as existential as some believe. The beauty of the pluralistic American political system and its delicately balanced powers means we can vote to punish people who have betrayed us without opening the door to socialist perdition.

I don't underestimate the capacity of people like Mr. Talarico and Ms. Acton to try bad and stupid policies. But we can panic less knowing their powers are constrained. In the unlikely event that Mr. Talarico proves to be the deciding Senate vote for legislation that requires Americans to swear an oath of allegiance to a God with ungendered pronouns, we do still have things like presidential vetoes and an independent judiciary to save us.

Paxton and Ramaswamy may have better policies, but their character ought to be disqualifying.

One of the features of Athenian democracy that Marco Rubio, the secretary of state, omitted from his selective invocation of the virtues of the ancient Greeks earlier this month was the institution of ostracism. Every year Athenians would file into the agora and vote on whether to send a fellow citizen into exile for 10 years for some civic infraction. They would place their little shard of pottery—the ostracon—inscribed with their villain's name, on a table and the unfortunate candidate would be ejected if the votes added up.

America has improved on Athenian democracy in most respects. We don't vote to send people into exile. But we do vote to cleanse our republic of people who have no business being anywhere near power. More important, we vote to hold people and parties to account. When a party has failed us and our values, a thrashing at the polls is the necessary route to remedy and redemption.

The Republican Party is in need of radical reformation. It has succumbed eagerly to the whims of an authoritarian leader. It has abdicated its constitutional responsibilities in Congress, failing to check administrative overreach or investigate corruption on an industrial scale. It has been a cheerleader to an administration that took us into a major war without explanation, justification or a plan, and it stood by meekly when it imposed policies that have harmed the livelihoods of ordinary Americans.

A thrashing next week would be a disaster for the Republican Party. But it might be the start of the road back for conservatism.

When Computers First Wrote Poetry

By Bob Greene

The warning was stark and unambiguous: "No one is quite ready to admit computing machines as full-fledged members of the human race but let's face it—they're getting closer."

That was in 1961.

The term "artificial intelligence" wasn't in common use, but the Los Angeles Mirror, a now-defunct afternoon newspaper, was telling readers about a puzzling development at a Southern California computer manufacturing company.

"Believe it or not," the story said, "the men who handle the care and feeding of the electronic monsters at the Librascope division of General Precision, Inc., in Glendale have got the darn things writing poetry."

The poems might not emulate Robert Frost or Carl Sandburg, the story said, but that wasn't the point: "The poetry kick is a research project directed toward finding better, faster and less expensive ways of stimulating the machines into intelligent reactions. . . . The computer can store more information, with total recall, than a human, can correlate more data, and compare a much larger number of possible answers than a person."

A 1961 newspaper report on an early attempt at artificial intelligence.

The implications were clear: If researchers developed the computer's capabilities fully enough, it might surpass humans in thinking, planning and acting. Most Americans were paying attention to other things in late 1961—the race to send men to space, the arrival of color television, the afterglow of the summerlong Mickey Mantle-Roger Maris home-run chase—so the goings-on at the computer lab in California were mostly regarded as a curiosity.

But it was conceivable, the Mirror cautioned, that someday "the machine is likely to come up with fresh, flexible ideas"—that is, to think on its own. And in an eerie precursor to today's concerns about AI agents defying their human masters, the first machine used for the project "outgrew its electronic britches"—became so smart that it required larger hardware.

Some of the machine's output was treated as an amusement. One of its early poems read: "Oh, panic not to this docile juice / Finally, few of my jackets did distrust the goose." But the Mirror predicted: "In time, perhaps a computer will write a book."

A few days later Tom Horan, an executive of Bendix Corp., let the paper know that his company's G-15 computer had already done just that: a 511-page hardcover volume called "Angular Indexing Tables" about "dividing a circle into any number of equal divisions." Two employees, he said, had fed the computer basic information, and the machine had written the book in 112 hours. Horan said that because of its arcane subject matter "the book will never make the bestseller list," but it had already sold more than 300 copies.

If the machines were someday to develop enough intelligence, artificial though it might be, to render us obsolete, was there any hope for mere flesh-and-blood men and women?

Matt Weinstock, a longtime Mirror columnist, offered a glimmer of optimism: "I get the feeling that if and when computers are admitted to the human race they'll want out."

Mr. Greene's books include "Chevrolet Summers, Dairy Queen Nights."

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Omani Youth Day highlights Oman's young leaders

EDITORIAL

A NATION'S future is never measured by the resources beneath its soil, but by the energy and vision of its young people. October 26, Omani Youth Day, is an occasion to reflect on a central pillar of Oman Vision 2040: youth are not simply the beneficiaries of development, but its architects and driving force.

Oman is a youthful nation, with more than 50 per cent of its population considered as youth. This demographic reality is not merely a statistic; it represents a profound strategic advantage. It is a vast reservoir of creativity, ambition, and resilience capable of leading the Sultanate of Oman into a new era of innovation, competitiveness and global engagement.

The true significance of youth in contemporary Oman lies in the multifaceted roles this generation fulfils.

One of the most vital is the preservation of identity while driving renewal. Omani youth stand at a unique intersection of past and future. They uphold the enduring values of tolerance, generosity, hospitality and respect that have defined Omani society for generations, yet they are equally fluent in the language of technology and globalisation.

This balance between authenticity and modernity allows them to protect heritage while reimagining it.

Through digital platforms, e-commerce for traditional crafts, film, design and cultural content, young Omanis are presenting the story of Oman to the world in a contemporary voice, ensuring that progress does not come at the cost of identity.

Equally important is their role as the engine of economic transformation. The transition toward a diversified, knowledge-based economy is being led by young entrepreneurs, innovators and professionals.

This spirit directly aligns with the objectives of Oman Vision 2040, which places human capital and talent at the centre of sustainable growth.

Realising this potential requires a supportive ecosystem that goes beyond celebration. It demands education that prioritises critical thinking and practical skills, accessible financing that understands entrepreneurial risk, and a labour market that rewards competence and productivity.

Beyond the economy, youth represent the social conscience and civic strength of the nation. In every wilayat, their presence is visible in voluntary work, environmental initiatives, health awareness campaigns, and participation in community dialogue.

In moments of challenge, such as adverse weather conditions, young volunteers have been at the forefront, organising support through both digital networks and on-the-ground action. Their strong sense of civic responsibility and environmental awareness reflects a generation deeply connected to its community.

The modern Omani youth is both a national citizen and a global citizen. Investment in their skills and capabilities is therefore an investment in the nation's human capital and its soft power

Furthermore, the modern Omani youth is both a national citizen and a global citizen. Connected, informed and competitive on an international scale, young Omanis study abroad, compete in international competitions, and represent Oman in diverse forums. Investment in their skills and capabilities is therefore an investment in the nation's human capital and its soft power.

The celebration of Omani Youth Day carries a clear message. The ambitions of a prosperous and sustainable Oman cannot be achieved for young people; they must be achieved by them. This requires continuous trust, inclusion in decision-making, and genuine platforms for youth to contribute ideas and solutions.

Empowerment is not a one-day event, but a sustained partnership throughout the year between institutions and the youth they serve.

The history of Oman was built by those who dared to venture beyond the horizon, guided by courage and knowledge. Today, that same spirit resides in its youth.

Ambitious, skilled, and rooted in their land, they carry the responsibility and the privilege of shaping what comes next. On the Omani Youth Day, the tribute is to every young Omani man and woman who holds Oman in their heart and builds its future with dedication.

AI WEALTH COULD RESHAPE PHILANTHROPY

ALEX PIGMAN

A wave of American wealth created by artificial intelligence companies could produce some of the largest charitable sums since the era of Andrew Carnegie and John D Rockefeller, raising questions about where the money goes.

Anthropic, the maker of the Claude chatbot, has said it would commit 5 per cent of its shares to a new Anthropic Public Benefit Fund, a stake that could be worth around $100 billion if the company reaches the $2 trillion valuation investors are eyeing for a stock market debut expected as early as November.

Combined with pledges by its seven co-founders to give away 80 per cent of their equity and a programme matching employees' donations, Anthropic says roughly a fifth of its shares will be dedicated to public-benefit purposes.

"This might be one of the biggest stories in corporate philanthropy ever," said Michael Moody, a professor of philanthropic studies at Indiana University's Lilly Family School of Philanthropy.

The OpenAI Foundation, the non-profit that controls ChatGPT maker OpenAI, holds a 26 per cent stake in the company that was valued at about $130 billion when it was restructured a year ago, more than the endowment of the Gates Foundation.

Nan Ransohoff of payments firm Stripe has described the moment as a "third wave" of American philanthropy, after the industrial fortunes of the late 19th century and the Internet billionaires of recent decades.

Carnegie argued in his 1889 essay 'The Gospel of Wealth' that "the man who dies thus rich dies disgraced," and by his death had given away the bulk of his fortune, about $350 million.

Carnegie transferred what remained into a trust, which has continued to make grants for more than a century. Rockefeller's money built universities and funded medical research and public health campaigns around the world.

Railroad magnate Cornelius Vanderbilt gave comparatively little, apart from the $1 million that founded the university bearing his name.Anthropic is setting up its fund as a limited liability company that it wholly owns, rather than as a non-profit foundation, which must pay out a minimum share of its assets each year and file public tax returns.

"The trade-off is that decision-making stays with the company and transparency is voluntary," said Sarah Wolfolds, who studies non-profit organisations at Cornell University's SC Johnson College of Business. ***— AFP***

A state visit that captured global attention, boosts ties



DR NAJMA AL ZIDJALY

The writer is Associate Professor, Sultan Qaboos University

FOR THREE days, X seemed to belong to Oman. Photographs, videos, commentary and reposts of the historic state visit by His Majesty Sultan Haitham bin Tarik to the United Kingdom filled timelines across the world.

What began as a carefully choreographed diplomatic occasion became something far more expansive: a global conversation about royalty, culture, history, courtesy and the extraordinary power of social media to bring people together. The pomp and circumstance were magnificent.

The carriages, the uniforms, the grandeur of Windsor Castle and the glittering state banquet offered everything admirers of the British Royal Family cherish.

Yet it was the smaller moments that captured the imagination of millions. The deep curtsey by HRH Catherine, Princess of Wales, to His Majesty the Sultan became one of the most widely circulated images of the visit. The warm exchanges between His Majesty and King Charles III, including their moments of laughter, revealed a more relaxed, human dimension to an occasion steeped in protocol.

Then there was the fashion. The colours, the elegance and the apparent coordination of outfits among the two delegations prompted endless discussion. The ease with which HH Sayyid Theyazin bin Haitham al Said, Deputy Prime Minister for Economic Affairs, accompanied the Prince and Princess of Wales added another layer of fascination.

Every majestic image seemed to invite another conversation. But the real story was happening online.

Royal watchers, an enthusiastic international community on X, began following not only the official proceedings but also Omani and Arab reactions. They reposted comments, photographs and videos, often using X's translation features to engage with Arabic-language discussions.

The visit was visually historic as well as diplomatically significant. X did not simply distribute official photographs; it enabled people to interpret and translate them, debate their meanings and connect them to personal memories and collective histories



People who might never otherwise have encountered one another were suddenly exchanging knowledge, asking questions and discovering unfamiliar aspects of each other's cultures.

For many Omanis and Arabs, the visit was an occasion for immense pride. Seeing His Majesty the Sultan received with such dignity, courtesy and warmth was deeply moving.

For British Royal enthusiasts, meanwhile, the visit offered an opportunity to learn about a country whose history, traditions and contemporary achievements were unfamiliar to some.

The result was an exchange that extended far beyond the diplomatic and economic objectives of the visit.

History, too, found a new audience. Photographs of the late Sultan Qaboos bin Said and earlier encounters between Omani and British royals circulated alongside contemporary images. The discussions reached further back into the nineteenth century, including the 1875 visit to London by Sayyid Barghash bin Said, Sultan of Zanzibar, whose historical connections also illuminate the intertwined histories of Oman, Zanzibar and Britain.

Even the rain became part of the story. When His Majesty declined to use an umbrella during the rainy welcome, online discussions turned to the cultural significance of rain.

For Omanis, rain is associated with blessing and goodness. What British observers might initially have regarded as an inconvenience became an opportunity to discover a different cultural perspective.

This is what made the visit visually historic as well as diplomatically significant. A curtsey became a discussion of respect. An outfit became a conversation about symbolism. A rainy afternoon became a cultural exchange.

His Majesty Sultan Haitham bin Tarik's immensely successful state visit reminds us that diplomacy does not end when the cameras stop recording. Sometimes, its most unexpected legacy emerges through ordinary people sharing extraordinary moments online.

For three days, the world watched Oman. And, through that attention, people discovered one another.

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Omani Women's Day... It is not just a day



LAKSHMI KOTHANETH

The writer is a senior editor of Observer

Omani women have always played an important role in society but today their roles are evolving to be part of the nation's development process.

Today, society has expectations of them. Not to just excel on an individual basis but to contribute. In order to achieve this, there have been many initiatives that have been put forward and what is encouraging are the private and public sectors' partnerships.

Innovation is the key word.

Oman's national economic diversification goals actively encourage the participation of women in software development, data science, engineering, and renewable energy sectors to foster long-term innovation.

Then there is 'SHE STEMS' Initiative that was launched by Oman Cables Industry in collaboration with the then Ministry of Higher Education, Research and Innovation. The objective of the programme is to upskill unemployed young Omani women (ages 24–30) with engineering degrees or diplomas for roles in manufacturing, tech, and industrial sectors. Now advancing through multiple editions, it provides accredited hands-on training and career placement support.

There have been institutional support for example through the academic bodies such as the Oman Society of Engineers and local universities by hosting regular Women Engineers Forums and technical competitions to bridge the transition from education to industrial and tech careers.

That transition from education to industry is most important because the scenario changes from a sheltered setting to a professional field. This is when one needs mentors to guide, but individually we need to be a professional in every way and practice resilience. It is easy to give up but it takes patience to learn and groom ourselves to fit in and then create a space for yourself.

What we studied may not be exactly what we are going to do initially. At the same time being a woman she will see her role in life go through transformations from being a daughter (when she is carefree), to a wife, a mother and so on. People might say men would also have the same responsibilities. But the roles vary and the successful ones strike the right balance.

The fact is women with children at times find it harder to climb the ladder than men with children. It is not in the minds of the mothers but in the perception of others.

It is a competitive world and being professional is the only way to survive but that does not necessarily mean we have to sacrifice empathy.

A professional performs regardless of their mood.

Just having a degree does not make us a professional. It has nothing to do with how we dress or the income we earn.

Professionalism is a mindset incorporated with a set of standards that govern how you perform and it becomes so strong that it becomes part of you. It defines your level of performance, handling of responsibilities including the quality of social interaction.

According to the experts, professionalism can be broken into five fundamental qualities — competency and mastery, reliability and accountability, integrity and ethics, respect and emotional and maturity and self - regulation. Self-regulation is when we can keep our personal biases or emotions from interfering with sound judgement, maintaining focus and representing our organisation or role effectively.

Oman's national economic diversification goals actively encourage participation of women in software development, data science, engineering, and renewable energy sectors to foster long-term innovation

Once we achieve, then what?

While we build our career path there is also a call to action.

A significant part is mentorship and networking. We have had mentors and years later it would be your turn to be a mentor.

There is definitely a need for experienced female leaders lifting up the younger generation through mentorship programmes. There is nothing as satisfying as sharing your experiences and being there for someone else who is starting their journey. Obviously, we move on too as continuous growth is a necessity. The remaining frontiers continue to exist for individuals who want to increase executive leadership roles, promoting work-life integration, and expanding technical skills for the digital age. At this point, we must ensure that we are AI efficient. Remember one generation of typists who were left behind when computers and keyboards arrived. This meant shorthand writing and stenography became redundant. Then we saw it happen again with mobile technology, however this time around everyone felt the need to join the movement towards technology.

From protests to power... how Serbia's students triumphed

LAJLA VESELICA

Serbia's long-running student protest movement celebrated a historic win in the country's election, ending 14 years of rule by the country's right-wing populist leader Aleksandar Vucic.

Born out of nearly two years of anti-corruption protests sparked by a deadly railway station canopy collapse, the Students' List is now eyeing a majority.

On November 1, 2024, a concrete awning at the entrance to Novi Sad train station collapsed, killing 16 people and sparking outcry over the tragedy at the newly renovated station.

Demanding a swift investigation, peaceful protests grew over months into some of the largest demonstrations recorded since the fall of strongman Slobodan Milosevic in 2000.

From the start, university students led the protests, blockading faculties and organising nationwide rallies.

The movement is deliberately leaderless and built around collective decision-making.

Just over a month before the second anniversary of the disaster, Vucic announced early elections, and the students assembled an electoral list drawn largely from academia and professional circles.

They are all deliberately outside any major political party. The movement built its campaign around opposing Vucic, setting aside issues that could divide its supporters.

"In order to win an election, the students needed the support of both groups of voters: those who are pro-European and those who are Eurosceptic," political analyst Dusan Vucicevic said.

Its campaign focused on corruption, the rule of law and attacks on press freedom. Its collective decision-making, developed during the protests, continued into the campaign.

The movement has repeatedly called for an end to the 'cult of personality' that has dominated the country's political system for decades.

The movement has not said who would be prime minister, leaving open who will lead the government, Vucicevic said.

Leading figures include Ilija Srdanovic, a cardiologist who headed the electoral list, and Radomir Saicic, a chemistry professor prominent in the campaign. But Vucicevic stressed that Serbia's prime minister does not have to be a member of parliament.

"So they have other people available whom they could bring into the government. We will have to wait and see."

The candidates will need to adapt quickly to deliver on their broad reform platform, with the fight against corruption at its centre.

On foreign policy, the movement has offered fewer details. It previously said it would maintain Serbia's refusal to impose sanctions on Russia over its war on Ukraine. ***— AFP***

Brazil's political titan defies passage of time

LULA DA SILVA, Brazil's President, once likened the events of his life to a miracle.

The titan of the political left made history by becoming the first person to win a presidential runoff after losing the first round in Brazil.

His shock win follows a long and storied political career, beginning in the bowels of a metalworkers' trade union and even including stints behind bars. He charted a rocky road to his fourth election victory.

Questions about his ability to do the job at almost 81 encouraged Lula to do squats and jog along the campaign trail to prove that he was fitter than ever. Initially startled by his second-place finish to Flavio Bolsonaro earlier this month, Lula dusted himself off and launched into an energetic runoff campaign.

He upped his social media game at the eleventh hour, posting selfie videos and buying a cellphone for the first time. The shift highlighted a certain disconnect with his country's extremely online, deeply polarised population, 14 years after he was first elected.

His victory preserves Latin America's largest country as a leftist stronghold amid a regional lurch to the right championed by US President Donald Trump.

Lula, a defining figure in Brazilian politics over four decades, rose from poverty to the presidency, fell into disgrace and was jailed, before once again rising from the political ashes when he returned to power almost four years ago. His first-round campaign focused heavily on his life story and legacy, which critics said was a misreading of what weary Brazilians wanted to hear. The president grew up in deep poverty, the seventh of eight children in a family of illiterate farmers in the arid northeastern state of Pernambuco.

He worked as a shoe-shine boy and peanut vendor before becoming a metalworker and trade unionist. In the 1960s, he lost a finger in a workplace accident.



Brazil's President Luiz Inacio Lula da Silva gestures as he addresses supporters after his victory in the presidential runoff election, at Paulista Avenue, in Sao Paulo, Brazil. ***— Reuters***



THOMAS MORFIN

The writer is a senior journalist with AFP

After losing three presidential bids, Lula finally entered the presidential palace in Brasilia in 2003 and was re-elected in 2006.

He left office in 2010 as a blue-collar hero who presided over a commodity-based economic boom that helped lift 30 million people out of poverty. Massive corruption scandals haunted Lula and his party, fuelling a wave of disgust that propelled Jair Bolsonaro into the presidency in 2018. Lula was jailed before the election until the charges were annulled on procedural grounds and the lead judge on the case was found to be biased.

However, Lula was not exonerated and the scandal contributed to enduring polarisation in Brazil.

Bolsonaro's presidency brought more division, and by the 2022 election, Lula pulled off a dramatic comeback by a razor-thin margin.

In his third term, Lula is credited with restoring social programmes eroded by his predecessor, curbing the destruction of the Amazon rainforest, and putting Brazil's democracy back on a more secure footing. But the father of five still triggers fierce rejection among voters frustrated by crime and corruption.

He has also faced criticism over Brazil's mounting public debt, which, with high interest rates, costs the government around $18 billion a month in interest alone.

Lula came under fire for an election-season spending push, including an increase to the Bolsa Familia social welfare benefits which, launched 20 years ago, remains his most significant legacy.

"He has that love for the poor. That's all it is," fisherman Antonio Carlos Lima Ferreira said at his home in the interior of Maranhao state, recalling times when he had to send his son to bed hungry.

"Today, at my table, I can choose what I want to eat."

Lula said recently he did not want to be remembered as "just the Bolsa Familia president."

Lula, who has not cultivated a potential successor, campaigned on a pledge to stop the far right from returning to "destroy" the country.

His improbable victory on Sunday awed his supporters, many of whom feared an erosion of rights under a theoretical Flavio Bolsonaro presidency.

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EDITORIALS

The days of extraordinary public-sector union wage hikes must end

Taxpayers are too strapped to subsidize wage hikes of which most can only dream

Collective bargaining agreements for most unionized Cook County and city of Chicago workers expire next year. Add that to the stakes for Chicago in coming municipal elections.

The budgetary backdrop for the county and the city has changed dramatically since most of the existing labor arrangements were negotiated in the hyperinflationary period immediately following the pandemic.

Do our political leaders actually understand that?

For example, city of Chicago workers generally will get raises exceeding 3% in 2027. Additionally, many of their union contracts tie their pay to the consumer price index, ensuring city workers' compensation will not fall below the rate of inflation.

Unionized county workers, meanwhile, will see 4% increases in 2027.

Rare of course is the private-sector employee who can count on a raise each year that at least keeps pace with inflation — and would well exceed cost-of-living gains if and when the U.S. attains the Federal Reserve's goal of 2% inflation.

Average hourly wage increases in the U.S. slowed to 3.0% in September, the lowest gain since the pandemic, according to Labor Department data cited by The Wall Street Journal. Meanwhile, consumer prices rose 3.4% in August.

We met earlier this month with Cook County Board President Toni Preckwinkle and her team to discuss the county's $9.7 billion 2027 budget, which Preckwinkle described as "the most difficult since I got elected and began serving in 2010." It's an election year, so Preckwinkle has managed to balance the budget by cutting expenses, tapping reserves and taking other one-time measures that obviated the need for tax and fee increases.



Cook County Board President Toni Preckwinkle arrives for the announcement of her 2027 budget proposal during a board meeting on Oct. 8. Preckwinkle described the county's $9.7 billion 2027 budget as "the most difficult since I got elected and began serving in 2010." ANTONIO PEREZ/CHICAGO TRIBUNE

But she offered no such promises for next year, as the county confronts the double whammy of substantial federal Medicaid cuts taking effect in 2027 and a recent adverse court judgment that bars the county from using $250 million a year in transportation-related revenues to support arguably related operations like traffic court.

"We're going to be in a difficult place," she told us. Asked whether that meant there will need to be revenue increases next year, she replied, "That would be my assumption." Never have we heard Preckwinkle so unequivocal on that question so far in advance.

Whether that new revenue takes the form of a property tax hike at the county level for the first time in Preckwinkle's long tenure or other taxes and/or fees is a subject for next year (assuming, of course, she's reelected to a fifth term in November). But the cold, hard budget realities the county faces, particularly in its role as Chicago's primary healthcare provider of last resort, are undeniable.

It's only fair, then, that if taxpayers should brace for bad news, so too should the 16,125 county workers represented by unions.

Team Preckwinkle understandably didn't hand us their strategy papers for the coming labor negotiations, which they told us will start right after the first of next year.

But they told us union leaders have been given briefings that make clear it's a new and harder day.

"They know how difficult things are now and for years to come," Preckwinkle's smart chief of staff, Lanetta Haynes Turner, told us. So, we asked, is it fair to say the coming labor pacts won't be as generous as the current ones? "It's fair to say that we will work with our labor partners to come up with a plan," she said, sidestepping the direct question but still leading us to that inextricable conclusion.

We hope the public-sector unions representing county workers get the same memo.

When times get tight at businesses, workers get lower cost-of-living raises, if indeed they get increases at all. A similar standard should apply to the public sector now that it's time again to bargain. This is no time for guaranteed inflation-beating wage hikes.

It was clear to us in our back-and-forth that Preckwinkle and her team understand their duty to taxpayers in the coming negotiations, but what about on the other side of City Hall?

Now that the election for mayor of Chicago, which takes place in February, is heating up, voters should understand that agreements covering thousands of unionized city workers are expiring at the end of June next year, even sooner than the Nov. 30, 2027, expiration at the county level.

These include workers for the Department of Streets and Sanitation represented by the Teamsters, city employees represented by the American Federation of State, County and Municipal Employees, and police officers represented by the Fraternal Order of Police, among others.

Mayor Brandon Johnson, who is running for reelection as an unpopular incumbent, fashions himself a champion for working people and has been, to put it mildly, less than a hard-nosed negotiator with unions.

Exhibit A during his tenure is the 2024 contract for Chicago Public Schools teachers, which has them getting raises between 4% and 5% each year through 2028. The average CPS teacher will make six figures at the end of the agreement; the deal's largesse already has CPS begging Springfield for a bailout to forestall layoffs, furloughs or both in the middle of this school year.

In 2023, Johnson was extraordinarily generous with police as well, boosting already-agreed-to raises to 5% from 2.5% in 2024 and 2% in 2025. Rank-and-file cops get between 3% and 5% hikes for the remainder of the contract, which runs through June of next year.

That's been Johnson's modus operandi when it comes to organized labor: pay public workers well over market and expect that the predictable ensuing deficits will force Springfield, the business community, billionaires or all of the above to ride to the rescue, whether they like it or not.

We don't know how Team Johnson plans to approach the coming labor negotiations, nor do we know if those discussions will end up being handled by a different mayor should Johnson fail to win reelection.

But we hope, if Johnson does indeed hope to complete those contract talks by the end of his term in May, that he delivers the same sort of expectations-setting message to organized labor that Preckwinkle's administration has — and then follows through.

That's unlikely based on his ideology and his record. Taxpayers ought to think hard about who they want on their side of the bargaining table when they vote for mayor in February.

The affordability crisis' latest victim? Halloween candy

Even Halloween candy isn't immune to the affordability crisis, making one of America's little luxuries just a little more painful ahead of this holiday weekend.

Consumer prices for sugary treats and chewing gum have risen more than 50% since September 2019, including 7.7% in the past year alone, according to the Bureau of Labor Statistics.

Mariano's this week advertised a 140-count bag of mini Hershey's candies, including Reese's, Kit Kats, Twizzlers and Jolly Ranchers, for $34.99.

$34.99! For a bag of candy that won't last very long in rush-hour trick-or-treat traffic.

At 25 cents per piece, it'd cost $50 to give one tiny piece of candy to 200 kids. In many family-oriented city neighborhoods and suburbs, 200 is nowhere near enough. And for families who leave out the bucket while they take their own little hobgoblins door to door, we expect the "Take 2" signs to be crossed out in place of "Take 1."

Or maybe: "Nothing to see or eat here, kids. Move on down the road, Thomas the Tank Engine."

As a result of these high costs, candy sales are sluggish, falling 6.7% in the month ending Oct. 17 compared with the same time last year, The Associated Press reported. Of course, prices are going up for everyday essentials like gas and groceries, eating into families' candy budgets. Maybe shoppers are simply dragging their feet to get their haul, but we suspect Halloween candy is yet another indicator of financial strain in household budgets.

Now, much as budget-conscious shoppers hunt for gas stations with the best price per gallon, a new breed of Halloween candy bargain hunters is on the hunt for low-priced trick-or-treat supplies.

Another wrinkle in the candy story is shrinkflation. BLS noted that candy and chewing gum were among the products most affected by "downsizing" — smaller portions —in recent years.

Augustus Gloop would be beside himself.

In addition to the lighter candy bags, exorbitant candy prices could also prompt the resurgence of apples and toothbrushes (seriously) as treats, or tiny trinkets instead of candy. Consider: It's cheaper to buy a 42-count package of mini Play-Doh on Amazon than to buy a bag of chocolate. At those prices, why not mix a few toys in with the sweets? Dentists likely are champing at the bit, ready and willing to substitute some dental floss for a slab of chocolate.

Much like the Whos down in Whoville kept the spirit of Christmas alive in spite of the Grinch's gift-stealing gambit, Halloween revelers can surely find ways to enjoy merriment on Saturday.

But those coveted full-size candy bars? Good luck finding those this year, kids.

ON THIS DAY 6 YEARS AGO
THE CONTROVERSY OVER JUSTICE KILBRIDE

Illinois Supreme Court Justice Tom Kilbride is on the Nov. 3 ballot seeking retention for a 10-year term. His fate lies with voters of the court's third district, which includes Will and Kankakee counties and stretches west to the Iowa border.

Kilbride's retention is getting a lot of attention in Chicago and Cook County, even though those voters will have no say in his future. Why? He's House Speaker Michael Madigan's guy.

Kilbride recently took $550,000 in campaign money from Madigan's state Democratic Party only weeks after vowing he would not "accept one penny" associated with the speaker. ... Madigan has denied wrongdoing.

But because of Kilbride's long-standing relationship with Madigan and court rulings that detractors say are a direct result of that relationship, conservative forces are waging an expensive battle to oust him. On the line is the court's 4-3 Democratic majority, which has held since Kilbride joined the bench in 2000, an election Madigan also firmly backed with millions in donations. ...

When we weigh endorsements of judges at all levels, this editorial board maintains a high bar for ouster. Judges accused of misconduct, abuses of power or incompetence generally fall on our radar for ejection. ...

There are no known complaints of incompetence or inappropriate conduct involving Kilbride. Opponents to his retention generalize that his rulings are harmful to taxpayers and that he is "bought" by Madigan, an unprovable claim. Republicans also shovel money into their chosen Supreme Court candidates' campaigns. Are they bought? Money alone is not a disqualifier.

Do we wish Kilbride's interpretation of the Illinois Constitution were different? Yes. We have loudly disagreed with his extremely liberal take on the Constitution's pension clause, going so far as to protect what we consider abuses of the pension statute. We have disagreed with the 2016 ruling against remap reform. ...

But we don't, as a board, recommend ouster of judges with whom we disagree. That is why you will see a "yes" to Kilbride's retention on our list of endorsed candidates. ...

For Kilbride's retention, third district voters will apply their own standards for justices. Should he stay? Should he go? Voters are welcome to make up their own minds.

Tribune editorial board, Oct. 27, 2020

EDITORIAL CARTOON



OPINION

If Israel gets a new prime minister, will anything change?



Daniel DePetris



A poster depicts Israeli Prime Minister Benjamin Netanyahu, left, and opposition candidate Gadi Eisenkot, his main rival and leader of the Yashar "Straight" party, along a pedestrian path on Monday in Tel Aviv, Israel, ahead of the country's general election. **DAVID GOLDMAN/AP**

On Tuesday, Israelis will head to the polls for an election that the international press has described as Israel's most consequential in decades — if not ever. The outcome will determine whether Israel continues its march to the ultraright, in which extremist political parties increasingly serve as kingmakers, or whether it reorients to the more balanced position that many Israelis in the dwindling political left and center believe is key to rebuilding the country's international partnerships.

Prime Minister Benjamin Netanyahu, Israel's longest-serving premier, has his back against the wall. The Oct. 7, 2023, terrorist attacks perpetrated by Hamas, which killed around 1,200 people, occurred on Netanyahu's watch.

Yet the prime minister has dodged all accountability for the massive security lapses, refused to support an independent commission of inquiry on that dark day and has catapulted Israel into a series of wars in the Middle East that have eroded its global image and at times caused tension with the United States, its most important backer. Israeli troops are now deployed in Syria, Lebanon and, of course, Gaza, where the 3-year-old war with Hamas that was supposed to end with a ceasefire has instead become a perpetual Israeli occupation with no end in sight.

Netanyahu is feeling the heat, pleading with President Donald Trump for more support on the eve of the election. Trump obliged over the weekend, writing directly to Israelis that "when you go to the Polls please remember that Bibi has been an outstanding warrior prime minister!"

Netanyahu's main opponent, Gadi Eisenkot, would beg to differ. Eisenkot, a career military man, served as Israel's top general in the West Bank during the Second Intifada in the early 2000s, and later became Israel's most senior officer during one of Netanyahu's terms. Even before he plunged into politics, the former Israel Defense Forces chief of staff lambasted Netanyahu for poor wartime leadership bordering on incompetence.

This isn't the opinion of some grifter; Eisenkot has firsthand experience with how Netanyahu makes decisions. Immediately after Oct. 7, Netanyahu asked his former military chief to join a wartime Cabinet for the sake of national unity. Eisenkot obliged, only to resign less than a year later after getting frustrated with Netanyahu's unwillingness to elevate a hostage deal over total military victory in Gaza.

"My idea was to do the hostage deal, and after that, defeat Hamas," Eisenkot commented to a Time magazine reporter recently. Instead, Netanyahu prioritized his political survival above all else — at least according to the prime minister's detractors. Although all of the surviving hostages were eventually released courtesy of the Trump administration's Gaza peace plan, a hostage deal could have been signed off on much earlier, saving Israeli troops — and Israel itself — a lot of trouble.

The state of Israel is at a monumental crossroads. Netanyahu's political power relies on several far-right parties that want to ditch all peace talks with the Palestinians and formally annex the West Bank and Gaza. Despite Trump's Gaza peace plan, peace in Gaza remains elusive. To date, Hamas has refused to disarm as Trump's deal demands guarantees that Israeli troops will pull out of Gaza forever. Netanyahu, in turn, wants Hamas to disarm first and only then will Israeli forces consider withdrawing.

As the standoff persists, the Israelis continue to expand their positions farther east, purportedly to pressure Hamas into accepting Israel's terms and sending a message to everyone else that the Palestinian enclave will remain under Israel's security control until it's satisfied otherwise.

Netanyahu and Eisenkot, former colleagues, are now intense political adversaries. But they may be more alike than many people think. While Eisenkot has blamed Netanyahu's government for the exponential rise in violent settler attacks against Palestinian civilians in the West Bank, calling them Jewish terrorism, his overall position in the West Bank sounds remarkably similar to Netanyahu's own: Under no circumstances can there be an independent Palestinian state.

Like Netanyahu, Eisenkot also supports building more Israeli settlements in the West Bank. The only difference between the two, it seems, is that settlement expansion has to be done more judiciously.

Regarding the two men's positions on the war in Iran, it's tough to decipher even the slightest difference. In cooperation with the Trump administration, Netanyahu has waged two wars against Iran in less than two years — the first, a 12-day bombing campaign against Iran's nuclear infrastructure in June 2025, and the second, a weekslong air war targeting everything from the Iran's political leadership to its missile-manufacturing facilities.

That second attempt, initiated in February, hasn't ended and could even grow in intensity after the U.S. midterms. Eisenkot has praised both operations and Trump's role in them and argued that preventing Iran from acquiring a nuclear weapon is absolutely necessary for Israel's security. (Whether Iran was even close to acquiring a nuclear weapon is another story.)

Trump has made it known that he prefers Netanyahu over Eisenkot. Part of this likely has to do with familiarity. After all, Netanyahu is the only Israeli prime minister Trump has worked with. Eisenkot is a known quantity in Israel but is a mystery to Trump, who like most leaders would rather continue with familiarity than have to form a personal relationship with a new leader.

Still, regardless of who is prime minister, Israel's national security policy won't really change. The deadlock in Gaza will persist, as will the one between Israel and Hezbollah in Lebanon, even as a Netanyahu or Eisenkot administration presses the Lebanese government to disarm Hezbollah. And the Strait of Hormuz will remain bottled up until some kind of peace deal between Washington and Tehran is solidified.

Israel's immediate future will look much like its present.

Daniel DePetris is a fellow at Defense Priorities and a foreign affairs columnist for the Tribune.

Trump administration acts out against police for doing their jobs

By Andrew Koppelman
SPECIAL TO THE TRIBUNE



Supporters of President Donald Trump clash with police as they try to storm the U.S. Capitol in Washington on Jan. 6, 2021. **JOSEPH PREZIOSO/GETTY-AFP**

Plenty of criminals are stupid and contemptible. Among the lowest of the low are the ones who hate police officers and prosecutors personally. They are too dim to comprehend an honest officer who is just doing his job. And so they sometimes seek revenge in ways that make no sense even from the standpoint of heartless self-interest.

President Donald Trump's administration evidently has a similar mindset. It has fired personnel in the FBI, the Justice Department and the military who, in previous administrations, followed lawful orders that Trump doesn't like.

America needs trustworthy and nonpolitical police, prosecutors and military members. An attack on the nonpartisanship of these institutions is an attack on America.

Republicans in Congress have quietly watched this happen without so much as complaining, much less trying to interfere. It has been a gross dereliction of duty. In normal times, members do not blindly obey a president of the same political party. Democrats objected to Lyndon B. Johnson's policies in Vietnam. Republicans helped force Richard Nixon out of office. Trump has faced little of that. If your senator or congressman is a Republican seeking reelection, you should ask them to explain their passivity.

The Republican Party once stood for law and order. It could again. But that won't happen until it is given a painful lesson at the ballot box.

When Trump took classified documents home and then tried to hide them from investigators, he committed a felony. The FBI ordered its agents to find out what he did. It also investigated his efforts to overturn the 2020 election. After Trump was reelected, those agents were fired en masse. There was no reason to think that they had anything against Trump. A good many of them no doubt voted for him. They had not chosen him as a target. They followed orders. The FBI Agents Association objected: "An Agent simply being assigned to an investigation and conducting it appropriately within the law should never be grounds for termination."

In the Justice Department, the administration has fired dozens of prosecutors who worked on the Jan. 6 riots and the special counsel investigation of Trump, again including those who were assigned to that work.

Joe Biden's administration told the military to pursue diversity, equity, inclusion and accessibility, and those orders were carried out. Trump's defense secretary, Pete Hegseth, said before his nomination that any "general, admiral, whatever — that was involved in any of the DEI woke s--- has got to go." Officers who carried out those orders were purged.

Columnist and Iraq veteran David French reports that one of the fired generals told him of his fear and writes: "Well, does that then set a precedent that if you are a general officer and you follow the orders of an administration, that the next administration will come in and purge you, replace you with general officers who have to then follow their orders, who will then only be purged by the next administration?" French observes that the administration is "setting a precedent that, given enough time under the current administration, could be catastrophic for the idea that merit matters as much as political fidelity."

Any discussion of criminals who hate cops should also mention that more than 130 prisoners who had been convicted of assaulting police during the Jan. 6, 2021, insurrection at the U.S. Capitol were released after Trump pardoned them or commuted their sentences.

This pattern of acting out against officials for doing their jobs is different in kind from Trump's familiar corruption, lying, cruelty and incompetence. At least all of that exhibited a malign cunning, a kind of instrumental rationality. Not this.

I once saw a toddler close a door on his fingers. He started crying and ran away, then came back and smacked the door because he was angry at it. These purges follow a similar logic.

Civilization depends on honest, apolitical police, prosecutors and military members. Trump's obliviousness to the harm he is doing is what we have learned to expect from him. So is his making of policy on the basis of petty spite. The irony is that many of the people he got rid of were capable professionals who would have helped him achieve his goals. But what excuse do his enablers in Congress have?

After the election, he will have two years left in his term. A responsible Congress will have plenty of damage control on its hands. One should at least vote for members who will understand that that is their job.

Trump has asked that voters act as though he were on the ballot this November. It might be the wisest thing he has ever said.

Andrew Koppelman is the John Paul Stevens professor of law at Northwestern University and author of "Burning Down the House: How Libertarian Philosophy Was Corrupted by Delusion and Greed."

OPINION

Most school shootings start with a gun brought into the home by an adult

By Nina Vinik
SPECIAL TO THE TRIBUNE



Children place flowers at a makeshift memorial outside Silver Rail Elementary in Bend, Oregon, on Oct. 16, a day after a deadly shooting at the school. **JOE KLINE/AP**

Every time a young person opens fire at a school, the same question follows: Where did they get the gun? That question came up again after a 16-year-old killed three children and an educator at Silver Rail Elementary School on Oct. 15 in Bend, Oregon.

The answer is predictable, because we've heard this story before. In 2021, a 15-year-old killed four classmates at Oxford High School in Michigan with a gun bought by his parents. In 2024, a 14-year-old killed two students and two teachers at Apalachee High School in Georgia with a rifle his father gave him. In Bend, the shooter used a gun purchased by his mother, authorities say.

In at least 7 out of 10 school shootings in the U.S. since 1999, the shooter has been younger than 18. When the U.S. Secret Service studied targeted attacks on K-12 schools, it found that in about 3 out of 4 cases involving a firearm, the attacker took it from the home of a parent or close relative.

Most school shootings don't start with a minor shopping at a gun store. They start with a gun brought into the home by an adult, believing it would make the family safer.

After shootings like these, calls for gun owners to keep their guns locked, unloaded and separate from ammunition are common. That advice matters, and campaigns to promote it are worthwhile. But it runs into a hard truth: Most people buy a gun to protect themselves and their family. It is very hard to convince someone to keep something locked and out of reach when they bought it to be ready in an emergency.

That's why storage habits are so stubborn. Most gun owners see themselves as responsible, yet more than half don't store all of their guns securely. And research has found that nearly 40% of parents in gun-owning homes believe their kids can't get to a gun when the kids say they can.

Despite years of campaigns to educate gun owners about secure storage, behaviors have barely budged. A study published this year found that storage practices appear to have become less secure in recent decades, with 2.1 million more children in the U.S. living with an unsecured gun today than a decade ago.

In Bend, the violence ended when a teacher tackled the shooter to the ground, allowing a dad who'd followed the shooter into the school to shoot and kill him. It is a relief that it ended before more lives were taken. But we shouldn't treat it as a win. Three children and an educator are dead, and another community is left traumatized. No amount of gun violence in an elementary school is acceptable.

If we want safer schools and communities, we have to start with understanding the beliefs that drive Americans' decisions with guns. The research is consistent: People who live in a home with a gun face a higher risk of dying by suicide, homicide or other gun-related tragedies. The gun meant to protect a family is far more likely to be used against someone inside it.

That is not the story most Americans grow up hearing. Entertainment, gun industry marketing and elected leaders of both parties tell us that safety comes from being armed. There is also a well-documented school safety industry rising up, making what was once a simple walk into school feel more like going through airport security. But hardening schools and practicing lockdown drills, among other steps to reduce school shootings, are not making young people feel safer.

Meanwhile, little has been done to educate young people about guns and the risks they pose before their attitudes and beliefs about gun use have solidified. Changing how adults think about any polarizing, politicized topic is an uphill battle, to say the least. But young people are different.

Earlier this year, Project Unloaded, a nonprofit I started, worked with ISG Research to evaluate our campaigns designed to educate teens on Snapchat on the risks of having a gun. We found that teens who saw our campaign were 17% more likely to believe they were safer unarmed and 21% more willing to talk to a friend about the risks of having a gun. Our community partner programs, which have reached more than 950 teens in Chicago since 2023, produce similar shifts.

It is possible to reach a future where school shootings are discussed in history lessons, and not morning headlines. Getting there starts with changing what we believe keeps us safe.

Nina Vinik is founder of Project Unloaded. She lives in Chicago.

Voice of the People

Officials' shameful denial

Plausible deniability is the ability of a person or organization to deny knowledge of, responsibility for or involvement in a controversial action in a manner that cannot be conclusively disproved.

A number of years ago, our daughter found our grandson sitting next to a freshly marked wall with a crayon in his hand. She started recording the incident. She asked: "Logan, did you write on the wall?" "No, Ella did it" was his reply. This made him an Instagram star, and it also became a very teachable moment. He has been shown this video on numerous occasions, and he sees the error of his way.

Plausible deniability can be cute when coming from a 2-year-old, but when coming from government officials, it is disgraceful. Take the example of the Starshield communications system and what it means for Ukraine's defense. According to the Guardian, Ukraine's military reported that Starlink, "produced by SpaceX but managed by the US government, was no longer working on terminals moving at speeds greater than 100mph." Ukraine's strike force became inoperable behind front lines; Russian drones were able to hit populated areas, adding to Ukraine's already high civilian death toll.

Does SpaceX founder and CEO Elon Musk take any responsibility? Musk said any disruption of Starshield was the responsibility of the U.S. government.

Marco Rubio is the secretary of state. He said: "The important point is we cannot direct a private company as to the decisions they make or do not make."

President Donald Trump said: "I don't know if it was anybody, because it wasn't me, and I don't think it was Elon." A very firm and resolute answer from the White House resident.

When a 2-year-old gets caught writing on a wall, it's something that a fresh coat of paint can fix. But you can't bring the dead back to life when incompetent adults start playing the plausible deniability game.

— *Mick Vendel, Elgin*



Ukrainian soldiers operate a drone over Russian-occupied territory from the Zaporizhzhia region in Ukraine on Sept. 14, 2023. **LYNSEY ADDARIO/THE NEW YORK TIMES**

Unconditional surrender

No one wants a "forever war." We therefore need to understand what causes a forever war in order to avoid it. I believe that forever wars are the result of "negotiated" settlements, which are then ignored by one or both sides. No one has actually won the war, so the sides have to continue negotiating/fighting forever.

I am aware of only two wars in my 79-year lifetime (in which the U.S. participated) that were won by someone. The most recent, Vietnam, was won by the communist rebels, and that country is stable today. Ho Chi Minh started the revolution because he really did care about his people; when Vietnam eventually realized that socialism by itself wasn't working, it adopted a hybrid capitalist-socialist model. The second was World War II. Adolf Hitler's government and Japan were so dangerous to the rest of the world that nothing but unconditional surrender was adequate.

We can't keep doing the same things we've been doing for the last 40 years and expect different results. Iran and its proxies are just as dangerous to the world as Nazi Germany and Japan were. The stated goal of Iran and its proxies is "death to the United States." Iran has shown that it aims to achieve that goal given enough time, especially if it develops a nuclear weapon. We must win the war with Iran and its proxies like Hamas and the Houthis. Unconditional surrender, not a negotiated settlement, is needed now as it was then, because they have shown that they care nothing about their own citizens with their unwillingness to negotiate in good faith (both now and in the last 40 years).

Winning will require boots on the ground, but the situation is serious enough that it should be a price we are willing to pay.

Everyone laughed at President Donald Trump's talk about making Gaza the Riviera of the Middle East. But he was, in his dumb way, talking about postwar assistance with rebuilding Gaza into a place where its citizens can live a good life. Just like we did in Germany and Japan after that war.

My biggest disappointment with Trump is that he abandoned the strategy of winning and is now trying to negotiate with an enemy that has no intention of negotiating in good faith. Iran is even bragging that it is winning this war. Well, maybe it is winning.

— *Mike Noonan, Elmhurst*

Good working relationship?

The letter from Dan Schuchardt ("Learn to work with Trump," Oct. 22) states that he doesn't understand the "No Kings" name for protests because he hasn't seen a coronation ceremony. He's right, of course, but what he fails to grasp is that Donald Trump is behaving the way a king would, despite being elected by the people. Making unilateral decisions contrary to constitutional law and the will of Congress is king-like behavior.

Secondly, calling Democrats "scum," "vermin," "animals" and "enemies of the people"; doling out disaster assistance based on loyalty, such as voting for him; doing what he can to disenfranchise voters; expelling journalists; and siding with Russian President Vladimir Putin in the war with Ukraine, among other things, are all much more serious than being "a little more cantankerous," as Schuchardt describes Trump.

For these reasons, I must respectfully reject his suggestion that Democrats try to forge a working relationship with Trump, and I hope that the new Congress holds him to account.

— *Ronda Schiess, River Forest*

Parties vote against the other

I'm having a very hard time adjusting to the political situation America finds itself in. In another lifetime, I was involved in local politics for some 37 years. There is a reason for political parties — different points of view and different constituents, for example. But their purpose ultimately is to provide what is best for the folks they represent. This is not happening in our country today.

Both parties are at fault. Each party votes against the opposing-party proposal regardless of the positive merit of the proposal. Each party is blind to the other and automatically votes against the opposing party simply because it is the opposing party. Who is left out? Citizens.

Sadly, I see no immediate solution. Polarization has set in on both sides with no compromise on the horizon. And this has filtered down not only at the state level but also at the local level.

— *Ed Zabrocki, Orland Park*

Census Bureau questions

An Oct. 24 front-page story by Robert McCoppin ("Proposals for census alarming advocates") reports that President Donald Trump's administration has proposed that the 2030 census omit questions about citizens' race, ethnicity and sexual orientation. According to McCoppin, Trump's Census Bureau now claims the process of data collection "should be colorblind and not be distorted in any way by questions about immaterial personal characteristics."

Gee, has Defense Secretary Pete Hegseth gotten the Census Bureau's memo? He seems to think that color, gender and sexual orientation are critically important to the battlefield performance of our troops. If those characteristics are immaterial, Trump needs to tell Hegseth.

Perhaps Trump can call the Census Bureau and the Defense Department into a meeting to devise a consistent policy.

— *F.K. Plous, Chicago*

No need for Halloween

I have no need for Halloween this year. Having Donald Trump as president and the cost of living are scary enough for me.

— *Nancy Morton, Harvard*

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