

The Statesman

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the Friends of India - founded 1818

Ageing Alone

India is quietly approaching a demographic turning point that its political vocabulary has yet to fully acknowledge. While public debate remains dominated by growth rates, employment numbers, and infrastructure expansion, a far slower transformation is unfolding beneath the surface - the steady ageing of the population, often in isolation and uncertainty. For decades, Indian society relied on the family as the primary institution of elder care. That assumption is now fraying. Urban migration, smaller households, longer life expectancy, and changing social norms have altered how ageing is experienced. A growing number of older Indians are living alone or with equally frail spouses, navigating declining health with limited daily support. What was once absorbed privately within households is increasingly becoming a public challenge. The consequences are not merely emotional. Ageing brings predictable medical and functional needs - mobility assistance, chronic disease management, memory care, and companionship. Yet India's health system remains overwhelmingly designed for acute treatment rather than long-term care. Hospitals may address illness, but they are poorly equipped to support ageing. Policy responses exist, but they operate in silos. Pension schemes offer modest income support, health insurance reduces hospital expenses, and legal provisions mandate family responsibility. Still, none of these adequately address the core issue: who provides day-to-day care when family support weakens or disappears? Financial assistance without accessible services leaves seniors theoretically protected but practically vulnerable. The imbalance is especially stark for those without savings or property. Private assisted living facilities and specialised care homes are expanding, but they remain out of reach for most Indians. Meanwhile, publicly supported elder care institutions are too few to meet even a fraction of the demand. The result is an uncomfortable gap between longevity and dignity. There is also a deeper societal cost. Loneliness among older adults is no longer an exception. Social isolation contributes to mental distress, accelerates physical decline, and increases dependence on emergency healthcare. These outcomes ultimately place greater strain on public systems - the very systems that proactive investment could strengthen rather than overwhelm. India's ageing challenge should therefore be viewed not as a welfare obligation alone, but as a matter of long-term economic planning. Countries that age without preparing for care infrastructure often pay later through rising healthcare costs, reduced workforce participation among caregivers, and widening inequality between those who can afford support and those who cannot. What is needed is a shift in thinking. Elder care must be treated as an essential social infrastructure, much like schools, roads, or hospitals. This includes training geriatric professionals, expanding community-based care networks, supporting home-care services, and ensuring income security keeps pace with inflation. Reliable data on living arrangements and care needs must inform policy, rather than assumptions rooted in an earlier social reality. India has succeeded in extending life expectancy. The challenge now is ensuring that longer lives do not translate into greater vulnerability. As the population greys, the measure of development will not be only in how fast the economy grows, but in how humanely it supports those who built it.

Breaking Point

What is unfolding in Iran is no longer a story of protest alone. It is a story of rupture between a state that increasingly governs through fear and a society that appears to have crossed the threshold of endurance. The demonstrations that erupted after the country's currency collapsed were, at first, familiar in form. Economic anxiety has driven unrest before. What followed, however, was unprecedented in scale and severity. Within days, peaceful gatherings turned into scenes of mass bloodshed, with security forces deployed to quell the protests. The scale and sweeping detentions across major cities. What distinguishes this moment is not only the number of deaths, but the intensity of loss. Protesters speak not of distant casualties, but of friends, neighbours and relatives killed in front of them - shot in streets, struck by pellets aimed at faces, or dying later from untreated wounds due to fear of arrest. In many cases, death did not end with the bullet. Families were allegedly pressured to pay large sums to retrieve bodies or to accept falsified records that reclassified protesters as members of the security forces. Such practices served both to punish dissent and obscure the true human cost of the crackdown. Independent rights monitors working from outside the country have begun assembling a grim ledger. Thousands of deaths have been confirmed, with many more under investigation, including children among the victims. Their insistence on linking fatalities to names and locations stands in stark contrast to official claims portraying the unrest as criminal violence rather than civic revolt. The widening gap between these competing narratives has itself become politically consequential. As information disappears and communication collapses, truth becomes contested terrain. This internal crisis is unfolding alongside escalating external pressure. As the regime confronts its deepest legitimacy challenge in decades, the United States has intensified military posturing and revived threats tied to the country's nuclear programme. The convergence has proved destabilising. Officials continue to project defiance, insisting authority remains intact. Yet the scale of the crackdown suggests vulnerability rather than confidence. Governments secure in consent rarely need to fire live rounds at crowds; force dominates when persuasion fails. What now confronts the leadership is not merely unrest, but erosion. The economy shows little sign of recovery. Public trust has frayed. Each funeral, each detained body, each silenced family deepens the divide between ruler and ruled. History offers few examples where repression of this magnitude produces durable stability. Streets may be cleared temporarily, but political relationships are reshaped irreversibly. Once citizens witness indiscriminate violence, fear loses its binding power. Iran may succeed in suppressing demonstrations for now. Yet beneath the imposed calm lie accumulated grief, unresolved anger, and a widening moral breach. A state that dominates public space, but cannot easily reclaim lost legitimacy. The tragedy unfolding is therefore not confined to casualty figures alone. It lies in what the violence reveals: a leadership running out of arguments, and a society no longer convinced that silence ensures survival.

Dangerous drift

For a country built on pluralism and linguistic nationalism, this represents a profound ideological rupture. Bangladesh is not merely unstable; it is slipping toward radicalisation by design. The tragedy of the Yunus regime is not malevolence but miscalculation. The assumption that technocracy alone could stabilise a deeply political crisis has proven false

When Muhammad Yunus assumed charge of Bangladesh's interim government in August 2024, the moment carried a symbolic weight. A Nobel laureate stepping in after mass unrest was meant to reassure investors, calm the streets and restore faith in institutions that he alleged had crumbled under Sheikh Hasina's tenure. Yunus promised his people technocratic governance, political neutrality, and overall stability; he promised the reset of order in Bangladesh after years of political polarisation. Eighteen months later, those promises lie in ruins. From a slowing economy to the collapse of law and order, from the breakdown of the garment export backbone to a sharp rise in communal violence, Bangladesh under the Yunus regime has entered a phase of systemic instability. The deterioration is not confined to one sector or one crisis. It is across the board - be it economic, social and institutional, and the cumulative effect is pushing the country into a zone of chronic fragility. This is not merely a story of poor performance. It is a story of state drift, where non-performance has created space for radical forces, criminal networks, and sectarian intolerance to flourish. The most immediate signal of decline is economic. Bangladesh's GDP growth fell to 3.7 per cent in FY2025, down from 4.2 per cent the previous year, a sharp deceleration for an economy that once was marching on a consistent 6-7 per cent growth rate. The IMF has been explicit about the causes of this decline as it pegs it to the political disruptions following the July 2024 unrest, production stoppages, policy uncertainty and weakening investor confidence. Inflation has remained stubbornly high, eroding purchasing power and driving urban discontent. Foreign exchange reserves currently remain under pressure, forcing the government into a humiliating dependence on IMF disbursements just to meet external obligations. What was sold domestically as 'stabilisation' by the Yunus administration



has in reality been survival finance. Bangladesh is now operating under an expanded IMF rescue package exceeding \$5.3 billion, including ECF, EFF, and RSF facilities. Each tranche comes with painful conditions marked by tax hikes, currency liberalisation and cuts to subsidies that the Yunus government has struggled to implement politically. The result is a complete paralysis as reforms are announced then delayed and diluted, then re-announced, while the cycle of uncertainty persists and the economy drifts. No sector better illustrates Bangladesh's decline than the Ready-Made Garment (RMG) industry, the country's economic spine and employer of over 4 million workers. Since Yunus took over, between 113 and 260 garment factories have shut down, depending on the time window used by industry bodies and labour monitors. Job losses range from 96,000 to more than 220,000. Export orders have fallen and margins have collapsed. The small and medium manufacturers are disappearing from the economic ladder. The causes are both structural and political. Bangladesh blames it on weak global demand, but its problems go deeper as the rising production costs, energy shortages, labour unrest, and above all, policy drift has stalled its economic growth engine. As factories shut, entire districts have slipped into economic distress. For many households, the garment sector was the last barrier between stability and poverty; its erosion is now feeding social volatility and crime. If economic decline is the first warning, lawlessness is the confirmation. Police

records and national crime data show a sharp rise in criminal activity in 2025 compared to 2024. Robbery cases jumped over 40 per cent. Snatching surged by more than a third. Murders increased. Total registered criminal cases crossed 181,000, up significantly from the previous year. This is not just about numbers. It reflects a deeper breakdown in state authority. Local communities increasingly rely on informal networks for security and the criminal syndicates operate with growing impunity inside Bangladesh. Political uncertainty combined with complete political hegemony has weakened the policing morale and command structures. The interim government's inability to restore confidence in the rule of law has allowed fear to replace order, a classic marker of state decay. Perhaps the most dangerous transformation has been social. Between August 2024 and June 2025, civil society groups documented over 2,400 hate crimes targeting religious minorities, Hindus, Buddhists, and Christians. These included killings, sexual assaults, rapes, temple desecration, arson, and mass intimidation. This spike did not occur in a vacuum. Political paralysis has created space for radical religious actors to reassert themselves on the streets of Bangladesh with near impunity. The Yunus government's response has been hesitant, reactive and at times silent. Its failure to decisively protect minorities has sent a dangerous signal to the radicalised

organizations that now read the signal as intolerance now carries limited or no consequences. For a country built on pluralism and linguistic nationalism, this represents a profound ideological rupture. Bangladesh is not merely unstable; it is slipping toward radicalisation by design. The tragedy of the Yunus regime is not malevolence but miscalculation. The assumption that technocracy alone could stabilise a deeply political crisis has proven false. Yunus entered office with moral authority but without a political machine, without electoral legitimacy and without control over entrenched bureaucracies. In trying to remain above politics, his government became irrelevant to it. In trying to be neutral, it became ineffective. As performance declined, accountability vanished. As institutions weakened, intolerance grew. As the economy slowed, crime accelerated. Each failure compounded the next. Bangladesh today is paying the price of governance without authority. The country is now at the edge of permanent instability. The question now is not whether the Yunus government has failed its promises. The real question is whether Bangladesh can arrest the slide before instability becomes structural, before economic fragility hardens into social fragmentation, and before religious radicalism fills the vacuum left by a retreating state. What began as an interim experiment in moral governance has turned into a cautionary tale that good intentions cannot substitute for power, legitimacy and performance. Bangladesh's crisis is no longer transitional. It is systemic and unless the trajectory changes soon, the country risks entering a decade defined not by growth and resilience, but by drift, division and decline.



RAJA MUNEER
The writer is an independent journalist and columnist

THE KATHMANDU POST

Melting Himalaya, melting morality

Today's Nepal is passing through a transitional period in which democracy exists, but democratic culture is weak; there is a constitutional crisis, the constitution is questionable. And there is political freedom, but the absence of moral responsibility is clearly visible. In such times, remembering Mahatma Gandhi is not merely historical worship but becomes a necessary ideological intervention. The question is not whether Gandhi is still relevant today or not, but whether present Nepal's political ecosystem can learn from Gandhian thought for a better future. Nepal, today, is facing two crises simultaneously: One visible and the other slowly seeping into the veins of society. The first crisis is climate change, manifesting in the form of melting Himalayan glaciers, erratic monsoons, floods, droughts and livelihood crises. The second crisis is the erosion of social harmony, which is deepening due to identity politics, unequal development and power-centric discourse. The mistake of viewing these two crises

separately is Nepal's greatest political and moral failure. Gandhi's vision teaches us that violence done to both nature and society ultimately springs from the same moral decay. For Gandhi, the meaning of politics was the impact on the life of the weakest person. If Gandhi were to see Nepal today, he could ask: Isn't the burden of the climate crisis falling first on the poor, Dalits, indigenous groups, Madheshis and marginalised hill communities? And isn't this merely an extension of social injustice? In Gandhi's vision, the climate crisis is not a technical problem but the result of a greed-based development model. Nepal's current development discourse speaks the language of this very greed, such as excessive mining, uncontrolled road expansion, the exploitation of rivers and the turning of forests into 'project sites'. The Himalaya is not merely a geographical structure but the foundation of civilisation.

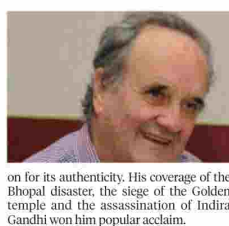
In Gandhi's vision, the relationship with nature is not one of use but of coexistence. But today, the Himalaya is being viewed as a resource in the language of electricity, stone, tourism and profit. When glaciers melt and sudden floods occur, it is called a 'natural disaster', whereas in Gandhi's language, this is human-made violence. This violence is not neutral. Its greatest burden falls on those very communities whose voices do not reach the corridors of power. This is the point at which the climate crisis begins to break social harmony because unequal suffering ultimately gives birth to unequal politics. Nepal's diversity is its strength - ethnic, linguistic, cultural and geographical. Gandhi considered diversity not as a cause of conflict but as the basis for dialogue. But when the state consistently leaves certain regions and communities behind in the name of development, diversity produces discontent rather than harmony. Today, social tension in Nepal is not merely a question of identity but of the distribution of resources, like who

owns the water, whose land, whose forest and who decides. Gandhi said that harmony without justice is an empty slogan. The same is necessary to confront the climate crisis through a genuine participation of local communities in decision-making processes. But today, even environmental decisions are imposed from above. Neither is the consent of affected communities taken, nor is their knowledge valued. Gandhi would consider this a violation of modern Ahimsa (non-violence), where no bullets are fired, but the basis of life is snatched away. Climate justice and social justice are the same struggle. The central tenet of Gandhi's politics was justice. Today, at the global level, there is talk of 'climate justice', but in Nepal's context, it remains incomplete until it is linked with social justice. A society that is divided from within cannot protect nature. And development that advances by crushing the poor cannot be sustainable. Gandhi's solution was less technical and more moral, i.e., simplicity, restraint and community.

Letters To The Editor ✉ editor@thestatesman.com

Left a mark

Sir, Eulogized as the BBC's 'voice of India', Mark Tully won the hearts and minds of millions in India and around the world. He held iconic status in Indian journalism. His was an easily recognizable face. He was a broad, disarming, beatific smile. He started theology to become a clergyman, but ended up becoming a world-famous journalist. He adhered to the golden rule of journalism, 'Facts are sacred, comment is free'. The BBC correspondent saw history in the making and chronicled it truthfully. Millions listened to his voice with rapt attention in this part of the world for over three decades. His reporting was authoritative, sensitive and free from 'sermonizing' and reflected India's vibrancy and diversity. His on-the-spot reporting of tumultuous events was relied



themselves became news stories. The criticism that he was indulgent of dehumanizing poverty and caste inequalities was unfair in that he was empathetic to their victims. Even as he identified himself as a Christian, he valued all faiths and held them in respect. His broadcasts and books conferred a certain immortality on him. The legendary Mark Tully made no secret of the sense of belonging he felt in India. He described himself as an Overseas Citizen of India and sometimes as 'a relic of the Raj' and made India, the land of his birth, his home. Yours, etc., G. David Milton, Maruthanode, 26 January.

Kuyili stands out in Indian history for her extraordinary courage and heroic contribution to the early resistance against British colonial forces. Beyond the dramatic moment of her sacrifice, Kuyili's legacy lies in what her courage represented: the role of women as active and indispensable fighters in India's freedom struggles long before the more widely known movements of the 19th and 20th centuries. Her leadership in the battlefield challenged contemporary norms and highlighted how determination, loyalty, and strategic action could face down superior military powers. Though her name is less familiar in mainstream narratives, Kuyili remains a powerful symbol of fearless resistance and selfless devotion to her land and people. Yours, etc., Narayanan Kizhundayayur, Thiruvur, 27 January.

Women's role

Sir, This refers to the article by Manas Das remembering India's first woman martyr Veeramangai Kuyili (Jan.26). Veeramangai

SATURDAY INTERVIEW

'Health systems will be resilient'

Over the last two years, Chhattisgarh has undertaken a steady recalibration of its public health system, with emphasis on primary care, workforce augmentation, and disease prevention. Moving beyond crisis-driven responses, the State has sought to strengthen institutions and expand access in underserved regions.

In this interview, Chhattisgarh Health Minister Shyam Bihari Jaiswal spoke with Shishir Roy Chowdhury about how these reforms, particularly at the grassroots level, are shaping long-term health outcomes in the state.

Q: What has guided health sector reforms in Chhattisgarh over the last two years?

A: The central objective has been to shift from a reactive model of healthcare to a preventive and systems-oriented approach. Strengthening institutions, improving early diagnosis, and ensuring continuity of care have been key priorities. A resilient public health system can only be built through consistent investment in primary care, especially in regions that have historically remained underserved.

Q: How has the State addressed long-standing human resource gaps in healthcare?

A: Human resources are fundamental to healthcare delivery. Recruitment has therefore been prioritised across

medical, nursing and paramedical cadres, with additional appointments currently underway. The introduction of regular online recruitment for specialist doctors has also improved transparency and reduced delays.

Q: What role has infrastructure expansion played in improving service delivery?

A: Infrastructure development has been guided by the need for regional balance. New district hospitals, civil hospitals, mental health facilities, Maternal and Child Health (MCH) hospitals and primary health centres have been sanctioned across the State. At the same time, public health laboratories are being strengthened to enhance diagnostic capacity and disease surveillance.

Q: Ayushman Arogya Mandirs are increasingly central to primary healthcare. How are they being strengthened?

A: The strengthening of Ayushman Arogya Mandirs is aligned with the vision articulated by Prime Minister Narendra Modi and Chief Minister Vishnu Deo Sai to build a healthier Chhattisgarh through robust primary healthcare. The focus is on comprehensive services that integrate prevention, wellness, and treatment at the community level.

Large-scale health and wellness camps and expanded screening and telemedicine services have improved access, particularly in remote and

tribal areas. As an administrative step, the renewed strengthening programme has been initiated from Jangla village of Bilapuri, underscoring the commitment to extend healthcare reforms to the most remote and vulnerable populations.

Q: How is the State responding to the rise in non-communicable diseases?

A: Early detection is crucial. Large-scale screening for hypertension, diabetes and cancer has been undertaken, enabling timely intervention and helping reduce long-term complications and financial strain on families and the healthcare system.

Q: Maternal and child health outcomes are often seen as indicators of system strength. What progress has been made?

A: Maternal and child health remains a core priority. Immunisation coverage has crossed 94 per cent, and targeted health and nutrition support has been extended to thousands of malnourished children. These outcomes reflect sustained frontline engagement, supported by strengthened primary healthcare platforms such as Ayushman Arogya Mandirs.

Q: What has been the approach towards communicable diseases like TB and malaria?

A: The focus has been on early detection, treatment completion,



and community participation. TB treatment success rates have improved, several gram panchayats have been declared TB-free, and malaria positivity has declined sharply due to sustained elimination efforts. Extensive screening has been carried out in tribal regions, with identified patients linked to continuous medical care. The emphasis is on long-term disease management rather than isolated interventions.

Q: What are the department's priorities going forward?

A: The next phase will focus on quality certification of health institutions, strengthening public health laboratories, expanding digital health services, and reinforcing preventive healthcare. The aim is to ensure that the system remains resilient and responsive across both routine and emergency situations. Sustained investment in primary healthcare, particularly in remote and tribal regions, is essential to ensuring that improvements in access translate into lasting public health outcomes.

100 Years Ago



Front page of The Statesman dated 31 January, 1926

OCCASIONAL NOTE

NEWS about Russia emanating from Riga is often of an alarmist character, but there is no reason to doubt the statement that friction between the Soviet and the Mukden Government still continues. After all in spite of his apologies and promises it is hardly likely that the heart of General Chang is changed. We are told that on the one hand Chang while releasing some prisoners is making others and on the other the Bolsheviks are following up their first demands with more vigorous ones. The astute Chinese inspecting general probably hopes to obtain Japanese aid. The Russians on their part seem to be hoping that Japan, having remained neutral so far, will continue to forbear whatever happens. Certainly the speech made in the Diet by Viscount Kato just before his death indicated the existence of some anxiety in Japan to maintain good relations with the Soviet. There is in that country now a powerful labour party which is not in sympathy with the imperial ambitions of the wealthy and aristocratic classes. It might make trouble if the Government threatened a war with Russia to protect the interests of Japanese traders in Mukden. At the same time, so intense is the patriotism of the Japanese people, if a war did come the Labour party would hardly dare to continue to protest against it.

Delivery, not intent, defines governance

T.K. RAMACHANDRAN

Two path-breaking interventions by the Government have had a great impact on planning, execution and monitoring of large projects — PM Gati Shakti and PRAGATI. We look at the latter in this piece.

The 50th high-level review under the PRAGATI (Pro-Active Governance and Timely Implementation) framework marks a fundamental shift in how the Indian State approaches governance, moving from intent to delivery, procedural compliance to outcomes, and fragmented authority to coordinated, timely execution. PRAGATI is thus not merely an administrative innovation; it represents a deliberate re-engineering of governance architecture. How did this model of governance deliver results when others have failed?

Delays in public projects have become almost axiomatic. Yet they rarely stem from a lack of policy clarity or financial sanction. They arise because governance systems are fragmented. Ministries function vertically; States and the Centre act sequentially; and disputes circulate without a forum empowered to impose resolution. Accountability diffuses even as activity multiplies. The core problem is weak coordination and silo-based review mechanisms.

As a result, the broader objective of project delivery is often lost. Many projects remained stalled for years due to land issues, environmental or forest clearances, regulatory approvals, contractual disputes, or inter-State coordination challenges. In a multi-ministry and multi-State political economy where each entity lords over the domain it controls, it is difficult for anyone to convince the other.

When several States and Ministries have to contribute to project completion, the old approach of having meetings,



discussions, field visits, constituting committees and endless correspondence is ineffective. This was an approach in which discussion was mistaken for decision, activity for work, movement for progress and mere intent for achievement.

PRAGATI addresses these persistent structural failures by redesigning how decisions are taken, synchronised, and enforced. Functioning as a system integrator, it brings decision-makers across Ministries, States, and districts onto a single institutional and digital platform. It collapses delays caused by file movement, jurisdictional ambiguity, and inter-departmental correspondence. Most importantly, it restores a bird's-eye view of execution, allowing leadership to identify where the system is constrained rather than where a file is pending.

The Prime Minister's role in chairing PRAGATI reviews is central to its effectiveness. His direct engagement sends an unambiguous signal that delivery is a national priority and that execution failures will receive

attention at the highest level. It facilitates decisive action and transforms review into a binding framework for results. Decisions taken during these reviews are final, time-bound, and digitally recorded, ensuring accountability is clear and enforceable.

Technology acts as a critical enabler. Real-time data, geo-spatial visualisation, and live interaction with field authorities eliminate information asymmetry between stakeholders and ensure that decision-making is grounded in evidence. Importantly, technology strengthens administrative judgment rather than replacing it, reinforcing leadership responsibility within the system.

What distinguishes PRAGATI from earlier review mechanisms is its insistence on closure. Issues remain live until resolved and are continuously tracked by the Cabinet Secretariat and the Prime Minister's Office. Explanations no longer substitute outcomes. Over time, this discipline has reshaped administrative

behaviour, encouraging Ministries and States to anticipate and resolve problems before escalation becomes necessary.

The outcomes are clearly visible and measurable. Projects worth over Rs 85 lakh crore have seen accelerated progress. In recent years, ten projects of the Ministry of Ports, Shipping and Waterways (MoPSW) were reviewed under PRAGATI, enabling early resolution of bottlenecks and faster execution. I will use two projects as examples.

The National Maritime Heritage Complex at Lothal is a single project involving many Ministries at the Centre like Culture, Defence, External Affairs, Railways and Highways as well as the Government of Gujarat. Also, since several coastal State pavilions are to be set up, the concerned States are also part of the project. Bringing the NMHC project onto the PRAGATI agenda last year immediately spurred action at multiple levels. Usually, the agenda is notified a few months before it is taken up for review by the Prime

Minister, providing an opportunity for different stakeholders to address issues with a sense of urgency. The result is that most issues that can be sorted at an official/ministerial level are already sorted out and only intractable residual items requiring guidance or direction are taken up during the actual review.

Similarly, the Lal Marg Vikas project, which is being implemented on NW-1 that passes through Uttar Pradesh, Bihar, Jharkhand, and West Bengal was reviewed under PRAGATI twice. This project is now at completion stage with most pending issues resolved. PRAGATI underscores a critical truth: public value is created not merely by announcing schemes, but by ensuring that sanctioned investments translate into outcomes. Stalled projects have progressed not because policies were rewritten, but because execution pathways were simplified and accountability enforced. Equally significant is PRAGATI's contribution to cooperative federalism. By placing Chief Secretaries and Union Secretaries on a single real-time platform, it replaces fragmented responsibility with shared ownership of results.

PRAGATI@50 stands as evidence that governance outcomes are a function of institutional design. Dismantling silos, restoring a bird's-eye view of execution, and prioritising closure, PRAGATI demonstrates that effective governance is not just about doing more, but also about doing what is already sanctioned, faster, better, and together. Timely execution accelerates access to services, boosts the economy, reduces regional disparities, and strengthens public confidence in the State's capacity to govern.

PRAGATI is both a record of leadership-driven delivery and a blueprint for governing complexity. The global attention and applause that it is receiving are proof of this.

(The writer is ex-Secretary, Ministry of Ports Shipping and Waterways.)

News Items

PRINCE'S HUNTING FIELD MISHAP

REVIVAL OF NATION'S FEARS

(FROM OUR SPECIAL REPRESENTATIVE)

LONDON, JAN. 29

THE thirteenth hunting mishap of the Prince of Wales has revived the controversy whether he should not restrict his dangerous pleasures. The Daily Express says that the Prince's ardour in the hunting field is causing serious concern. The Prince is an asset of the Empire and is not a private but a national figure. While nobody wants to see the heir to the Throne molly-coddled it is surely possible for him to ride to hounds without taking unnecessary risks.

The Daily Graphic hopes that the accident will not inspire another silly agitation for the restriction of the Prince's sport. Falls are a daily occurrence during the season and nineteen out of twenty pass unnoticed, but the Prince's position and personal popularity are the cause of fears.

JAPAN'S PART IN WORLD PEACE

DISORDER ELEMENTS IN FAR EAST

(BRITISH OFFICIAL WIRELESS)

RUGBY, JAN. 29.

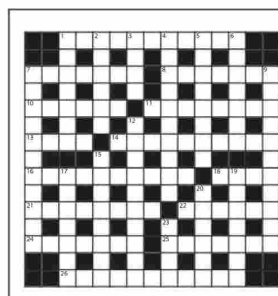
A BANQUET in honour of Prince Chichibu of Japan, who is making a prolonged sojourn in England to study social and other conditions, was given by the Japan Society last night.

Prince Chichibu said that during his short study in England he had already learnt to know much of the charm of England, her scenery, her ancient buildings, her culture and that knowledge which made him realize the value of work which the society could do in extending the knowledge of Japan and Japanese art, literature and life. It was his sincere hope that East and West might continue to learn much from each other to the lasting advantage of both and to the lasting peace of the world.

Lord Salisbury, after expressing his profound condolences with Japan on the great loss sustained by the death of Viscount Kato, alluded to the smoothness with which diplomatic relations with Japan invariably proceeded. The tendency was now towards the combination of the Powers. Locarno was an example of the effort for an inclusive one great international agreement. The League of Nations was another example of the same great tendency towards universal agreement along the path of peace.

In various parts of the world, and in the Far East especially, the elements of disorder were profoundly alarming, and it was of vital importance that the Powers, which by long tradition and the habit of national discipline were able to act as a check and a control on the forces of disorder, should themselves as nearly perfect as possible. Japan was one of these Powers. — Reuter.

Crossword | No. 293361



YESTERDAY'S SOLUTION

SUPERHERO OBTAIN
T I A B E C O
A P E N T U R E D O W N M A
B I L I T Y S E E
L O A D I N G D O U B L E
C O U S E
L I G H T O C I A R I O M A N
A R O U S E Y E S
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A W E M E N T A L D I S T R E
S S
M A R H O U T C H A R A C T E R
S
S U P E R I O R I M P A T I O

ACROSS

- Engineer claims idea involving old interactive websites (6,5)
- Greek character from university returning cured of speech impediment? (7)
- Rural virus, mostly accompanied by stomach pain (7)
- Unpleasant atmosphere when old lady goes behind this writer's back (6)

- Backache after beginning to prune plant (8)
- Mix 3 ingredients for sandwich filling (4)
- President observed going around hotel in grand fashion (10)
- Many got so confused about right art of fine dining (10)
- Wife quits golf club in bitterness (4)
- Number really disconcerted over worker's status as rent payer (8)
- Dubbing for film musical (6)

- Pester captain boldly going to effect military evacuation (7)
- Demanding individual, ultimately manager to you and me (7)
- They discern thoughts of fear stopping workers going underground (10)
- Support American being consumed by shame (7)
- School bus many regularly filled, forming queue (6)

- Relative having a cheerful manner without any frills (4)
- Anger breaks over TV chef in Maine making US trailer (6,4)
- Party with peanuts provided regularly for Will, maybe? (8)
- No fewer than Fifty invaded a revolutionary state (2,5)
- Absolute timing a dour represented (11)
- Honour Holland typically announced (6)

- displaying royal Uncle, man lacking money and close to despair (10)
- Briefly test coupling that holds new rotating pin (8)
- Clerics decide a Conservative is accommodating (7)
- Band of very cold weather reported (6)
- Star doesn't go conversing in Spanish (4)

NOTE: Figures in parentheses denote the number of letters in the words required. (By arrangement with The Independent, London)



A job well done

The Survey has laid out an ambitious economic and governance plan

Through his Economic Survey 2025-26, Chief Economic Adviser (CEA) V. Anantha Nageswaran has once again shown the value of level-headed analysis while eschewing sensationalism. With the global economy in flux and the Indian economy displaying stability, the need of the day is pointed analysis of current data for future policy. In this, the Survey has delivered. It has charted out a broad framework for a medium-term economic and governance strategy, highlighting the concept of an 'entrepreneurial state' that is more risk-taking, agile, and willing to experiment. The CEA is pushing for a forward-looking dynamic shift to policymaking that is willing to fail and learn in the quest for much-needed growth acceleration. Now past the turbulent COVID-19 pandemic, it is time to look ahead with policy filling the economy's sails. The Survey acknowledges that this will not be easy. Indeed, it assigns a 10%-20% probability to the global economy, in 2026, descending into a crisis worse than that in 2008. Even its best-case scenario is a worsening of conditions as they were in 2025. Yet, the Survey does paint a favourable picture of India's economy, backed with facts and figures. It also does not shy away from pointing out some emerging risks and developing problems.

At the macro level, it points out that the falling rupee does not reflect India's economic fundamentals, and the depreciation is due in large part to capital flowing to countries with more developed AI industries and to safe-haven assets. A weak rupee is good for exporters, but India predominantly depends on imports – and those have become more expensive. If trade negotiations have revealed anything, it is that India is not strategically vital to any merchandise supply chain. To address this and other structural weaknesses, the Survey outlines an ambitious plan to focus on strategic resilience and, eventually, develop "strategic indispensability". It also argues for greater fiscal flexibility for the Centre to address geopolitical and geo-economic uncertainties, but, simultaneously, cautions States against fiscal populism. The reasoning is clear: while the Centre has managed to more than halve its fiscal deficit ratio in five years, an increasing number of States have fallen into revenue deficits in this period. This cannot be ignored, despite the political attractiveness of unconditional cash transfers. It is noteworthy that four major States go for elections this year, only one of which is currently led by the BJP. The Survey points out several other emerging problems, such as the impact of ethanol production on food security, the real costs of the ongoing shift to renewable energy, the lack of adequate fodder, and, not insignificantly, the impact of "compulsive scrolling" on smartphones. Each of these merits attention, and the Survey has done its job well by highlighting them.

Stay the course

Equity rules may need modifications, but they are essential

On Thursday, the Supreme Court of India stayed the University Grants Commission (UGC)'s Promotion of Equity in Higher Education Institutions rules, calling them "too sweeping". Notified in January, the rules sought to address all forms of discrimination, in particular caste-based, on campuses after years of activism, litigation and tragic suicides such as Rohith Vemula that shocked the nation's conscience. The Court had mandated the UGC to draw up these rules. The 2012 UGC framework on this issue had been almost completely ignored by HEIs. Caste and caste-based discrimination is a persisting reality and addressing it should be a political, social and educational priority. Many students have faced it, leaving lifelong scars, and sometimes ruining lives. UGC figures show that the number of such complaints in HEIs has more than doubled in the last five years. The draft rules were made public last year for discussion and the rules have been notified with changes. There is a case that the new rules are a dilution of the 2012 framework that identified many more and pressing forms of discrimination, and had separate sections that dealt with problems faced by SC/ST students such as not fulfilling reservation norms. But what is different is that the new rules seek to implement the setting up of equal opportunity centres, equity committees, equity helplines and squads, and time bound complaint resolution through better monitoring, oversight and representation in the inquiry committees. An HEI's non-compliance with these rules can invite UGC action, potentially bolstering compliance.

Campuses in parts of northern India have seen protests against the new rules on two counts. The rules define caste-based discrimination as only those against SC/STs and OBCs, and there is no provision for action against false complaints. At one level, the former may seem unfair to general category students who appear to have been denied recourse. Though it is self-evident that caste-based discrimination is almost exclusively against lower castes, the Court could consider leaving out the explicit definition. This may mar the political signalling in the context of what led to the original Court directive but could be considered so as to achieve the overall goal of the new rules. Also, the draft rules of 2025 offered provisions for addressing false complaints. Putting them back in could have a chilling effect on complainants from marginalised sections. But a solution could ensure that only complaints proven to be motivated to frame someone were actionable, not all complaints that were merely unable to prove discrimination.

Green steel can shape India's climate goals trajectory

India stands at a defining moment. Last year, while addressing COP30 delegates in Belém, Brazil, Union Environment Minister Bhupendra Yadav committed the country to submit a revised, more ambitious Nationally Determined Contribution (NDC). This is an opportunity for the country to position itself as a leader – not just with a revised pledge, but with clear plans for the economy-wide decarbonisation needed to meet it, including in those sectors that are hardest to decarbonise. No industry is more critical here than steel.

A chance to lead

As one of the largest growing economies, the steel sector is the cornerstone of India's growth, driving infrastructure and industrial development. In fact, to reach the country's latent potential, steel production would need to more than triple from the current approximately 125 million tonnes a year to more than 400 million tonnes by mid-century. This is unprecedented growth in the given time and will surely come at a cost. The sector accounts for around 12% of the country's carbon emissions today, largely due to its continued reliance on coal.

Much like other emerging economies, India faces a twin challenge of ensuring continued development, while meeting long-term climate targets.

Vital to achieving both of these goals will be avoiding locking in high carbon infrastructure. The investments made in the steel sector today will determine the long-term outlook of the steel industry. Absence of ambition on the transition could lock in billions of dollars of carbon inefficient technologies. This would not only be environmentally disastrous but also render the Indian economy unattractive in the medium to long term.

Global markets have spoken. Around the world, we are seeing countries take important strides to transition the steel sector. China, for example, is slated to ramp up its scrap-based secondary steel making production and investment in green hydrogen to reduce reliance on coal in steel making.

Meanwhile, the European Union has been on the de-carbonising journey for around two decades. Its Carbon Border Adjustment Mechanism (CBAM) is driving the shift to cleaner steel making for those exporting steel to the region.

Countries unable to demonstrate low-carbon production will face steep border charges, risk losing access to premium export markets and being called out as laggards in energy transition that the world really needs to make. Early movers in green steel will secure a decisive competitive advantage. India's steel sector cannot afford to



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delay. These warnings have long been noted by India's steel sector, which is already taking steps in the right direction. Tata Steel has piloted injection of hydrogen in blast furnaces, scaled renewable power purchase agreements, and explored carbon capture solutions. Meanwhile, JSW Steel and JSPL are exploring green hydrogen integration, while the Steel Authority of India Limited (SAIL) is modernising blast furnaces and exploring low-carbon production routes.

This change has been driven from the very top of companies. It requires bold strategic choices and sustained investment in innovation. And while this progress is important, the sector can and should be doing more.

It must move quickly from pilots to demonstration plants, and then to full-scale near zero technologies. Small- and medium-steel manufacturers also have to adapt to the reality of climate emergency by adopting best available technologies and raw materials to produce more carbon efficient steel.

The sector should no longer be investing in business-as-usual high carbon intensive blast furnace technology. All new capacity needs to be low to near zero carbon, as soon as possible.

Policy progress so far

Making these bold moves requires responsible executives and boards to have confidence in the trajectory of the sector. This is where consistent policy signals to guide long-term industrial planning come into play.

India has made important strides to set direction for the steel sector. The release of the government's Greening Steel Roadmap in September last year set a practical pathway for the sector's decarbonisation. This publication of Green Steel Taxonomy in December 2024 made India the first country to formalise such a definition. The National Green Hydrogen Mission, expanding renewable capacity and carbon emission intensity targets for 253 steel units under the Carbon Credit Trading Scheme (CCTS), demonstrates momentum.

Yet, a year on from the Taxonomy launch, the policy incentives to really shift investment away from coal-based blast furnaces are yet to materialise and India risks being the only country to continue to add expensive age-old technologies in its economy.

The barriers to green steel are significant but solvable: limited supply and the high cost of green hydrogen; insufficient renewable energy dedicated to industry; limited availability and the informal nature of the scrap market in India; consistent and assured availability of reasonably priced natural gas as the transition fuel; identification and development of natural carbon sinks for sequestration; lack of long-maturity, low-cost debt for green steel projects and the

need to de-risk them; and the need for workforce upskilling and technology support. Many of these are challenges of policy and investment, areas where India has demonstrated rapid transformation when it wanted to, as seen in renewable energy over the past decade.

To seize this opportunity, we need the government to act as a fair regulator for the sector and set clear, stringent short-, medium- and long-term carbon emission targets for industry to roll its capital investments. This would include rolling out the carbon price regime at the earliest, which would provide an appropriate mechanism for dispersing this cost of green steel through the value chain.

In Europe we have seen that near zero emission technologies could become viable only after the carbon price reached \$90-\$100 a tonne of CO₂. India can learn from this experience when it comes to scheduling its own carbon emission targets.

We need to see the Green Steel Taxonomy socialised well, creation of a domestic market through a public procurement policy for green steel and promotion of greener products with appropriate certification mechanisms and labelling in place.

Natural gas will be a transition fuel for the steel industry as it moves towards hydrogen-based production. The government needs to make natural gas availability for the steel sector a priority. Companies would find it difficult to afford infrastructure for green electricity, green hydrogen or pipelines for natural gas or pipelines for evacuation of captured CO₂ on their own. The government needs to set up hubs in key areas for development of green steel where costs of this infrastructure can be shared.

With low-carbon manufacturing capacities having a capital intensity which is approximately 30% to 50% higher, these policies are expedient and become urgent in the Indian paradigm. Steel producers may need some fiscal support too, to make this transition possible. The smaller players will definitely need some additional support to ensure that the transition is equitable.

A strategic imperative

Green steel can no longer be optional. It is central to India's climate goals, economic future, and global leadership in sustainable industrialisation. India has already demonstrated global leadership in renewable energy deployment, climate diplomacy, and clean-tech scaling. Steel is now the next frontier: a critical test and an unprecedented opportunity.

By combining decisive corporate action with a robust, market-aligned policy framework, India can decarbonise steel, secure economic competitiveness, and shape global industrial standards.

Locking in billions of dollars in carbon inefficient technologies will be environmentally disastrous and harm the Indian economy

The 27th amendment, Pakistan's democratic dilemma

Last year, between November 12 and 13, Pakistan's legislature passed the 27th Amendment, or PCA, which subsequently received presidential assent. Presented as a measure to reorganise aspects of the military command structure, the amendment has consequences that reach far deeper into the constitutional order. The PCA significantly diminishes the central role of the Supreme Court in Pakistan's constitutional order. By transferring original jurisdiction over constitutional interpretation, fundamental rights and federal-provincial disputes to a newly created Federal Constitutional Court, or FCC, the amendment sidelines the Supreme Court from the most consequential questions of governance.

In recent years, it was precisely this jurisdiction that enabled the top court to adjudicate landmark political cases, including the Panama Papers case and the Memogate controversy. Stripping the top court of this authority not only fragments constitutional adjudication but also weakens its position as the final guardian of the Constitution, leaving it vulnerable to institutional marginalisation under executive influence.

Strains in the region

The passage of the PCA must be viewed against a broader regional backdrop. South Asia is navigating a period marked by political instability, security concerns and institutional strain. These pressures are not confined to national borders. For countries in the Global South, where institutions are often tested by competing imperatives of security and governance, constitutional choices carry long-term consequences.

For India, examining such developments in its neighbourhood is neither voyeuristic nor adversarial. As the region's largest constitutional democracy, India has a direct interest in how constitutional norms evolve – or erode – around it. The weakening of judicial independence or the normalisation of executive dominance elsewhere in South Asia carries cautionary lessons.



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At the core of constitutional governance lies what English jurist A.V. Dicey famously described as the rule of law, a doctrine premised on the absence of arbitrary power, equality before the law, and the central role of independent courts as sentinels of rights. In Dicey's conception, the law exists to restrain authority, with courts serving as the institutional bridge between power and liberty. It is precisely this equilibrium that the PCA unsettles.

By diluting the Supreme Court's position as the final arbiter of constitutional questions and vesting that authority in a newly-constituted FCC, the PCA risks weakening institutional independence. Courts, in Dicey's framework, are not mere forums for adjudication but constitutional guardians tasked with keeping executive power within bounds.

The federal constitutional court question

It is in this constitutional light that Pakistan's creation of the FCC warrants scrutiny. While specialised courts are not inherently problematic, removing constitutional adjudication from the Supreme Court unsettles a balance that was carefully restored by the 18th Constitutional Amendment. It sought to depoliticise judicial appointments by strengthening the Judicial Commission of Pakistan and also insulated the judiciary from executive dominance.

What is more troubling is the scope that it creates for executive influence over the FCC's composition and functioning. Constitutional courts derive legitimacy from independence, not mere existence. When constitutional interpretation is shifted to a newly constituted forum that is vulnerable to executive preferences, judicial review risks becoming an extension of power.

In early 17th century England, King James I asserted that, as sovereign, he could personally adjudicate disputes. This claim was firmly resisted by Sir Edward Coke, then Chief Justice, who declared that the king was subject to the law and could not sit in judgment. Coke's refusal to allow royal intrusion into judicial proceedings

marked a defining moment in constitutional history.

This episode established a principle that continues to animate modern constitutional democracies, that is judicial authority must remain independent of executive will. Courts cannot function as neutral arbiters if they operate under the shadow of political power. The struggle between Coke and James I was not merely personal. It was foundational, affirming that the rule of law requires courts to be insulated, even from well-intentioned rulers.

Why it matters for India

The latter half of the 20th century marked the birth of new nations, as societies emerging from colonial and monarchical pasts embraced written constitutions and republican governance. Constitutional texts became instruments of restraint, designed to bind power. The 21st century, however, presents a more unsettling picture. Across regions, republics are increasingly reshaping their constitutions not to deepen democratic guarantees but to legitimise concentration of power.

The PCA reflects this troubling shift. By reconfiguring judicial authority under the shadow of executive influence, it risks transforming the Constitution from a shield into a tool of governance. In inter-war Europe of the 1930s, democratic breakdown did not occur through abrupt coups but through formally valid legal changes that steadily hollowed out institutions. Power was acquired electorally, and then consolidated by rewriting constitutional checks in the name of stability and necessity.

For India, the lesson is not one of comparison, but of caution. Constitutional democracy does not survive on text alone but on the continued independence of courts, respect for institutional boundaries, and a shared commitment to restraint. How republics treat their Constitutions today will determine whether this century is remembered for democratic renewal, or for the quiet dismantling of the spirit of constitution from within.

The amendment has consequences that will deeply affect the constitutional order

LETTERS TO THE EDITOR

Censorship and democracy

The order remanding the issue of grant of censor certificate to the film *Jana Nayan* will only further delay its release. Apart from the producers of the film being hurt, people too would lose an opportunity to get to know what the film is all about. Freedom of

expression, particularly in movies, is important for the dissemination of ideas and views. It is a right guaranteed under Article 19(1)(a) of the Constitution. The landmark judgment of the Supreme Court, in *S. Rangarajan vs P. Jagjivan Ram* (1989), emphasises in more than one place that

freedom of expression cannot be suppressed on account of threats of violence. The Court further held that such an act would "tantamount to negation of the rule of law and a surrender to blackmail and intimidation. It is the duty of the state to protect the freedom of expression since

it is a liberty guaranteed by the State." Though a reasonable restriction can be placed under Article 19(2), it cannot supersede the right itself. The way the situation is going about, it appears as if the fundamental right to freedom of speech and expression is subordinate to

the restrictions imposed upon it.
N.G.R. Prasad,
Chennai

Legends never quit
Novak Djokovic has done it again after four hours and nine minutes of tennis that pushed his body and mind to the limit. It was a

testament to resilience, focus, and relentless determination. In those high-pressure moments, Djokovic did not just survive. He thrived.
A.P. Thiruvadi,
Chennai

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

GROUND ZERO



Students protesting against the 2026 UGC regulations at Delhi University. SUSHIL KUMAR VERMA

Cracks on campus

Students from the general category or upper castes believe that the UGC's 2026 regulations, introduced mainly to address caste discrimination on campuses, will create a divide and villainise them. They worry about several of its provisions, including the lack of protection against false complaints. While the Supreme Court has stayed the regulations, anger has not yet subsided, report **Abhinay Lakshman and Mayank Kumar**

In a crisp January morning, 22-year-old Amit Mishra from Ballia, a first-year student at Lucknow University, marched from the faculty of law to gate number 3 of the campus – a 3-kilometre walk. He was joined by 60 others. The banners they carried did not bear logos of political parties or student unions or associations.

The students had come together to protest the 2026 regulations of the University Grants Commission (UGC), a statutory body that regulates higher education in India. Called the Promotion of Equity in Higher Education Institutions Regulations, 2026, these rules were introduced primarily to address caste discrimination on campuses across the country.

As protests at the university picked up, demonstrations against the UGC's new regulations intensified – not only in parts of Uttar Pradesh, but in Delhi, Madhya Pradesh, and Uttarakhand as well. Claiming that the regulations would "divide" campuses along caste lines and "villainise" general category students, the agitators demanded that they be rolled back immediately.

"We cannot permit the future of our upcoming generations to be jeopardised," Mishra said.

What the new regulations say

The 2026 UGC regulations, notified in early January, replaced the version in effect since 2012. In the new regulations, the UGC, for the first time, introduced the term 'caste-based discrimination,' defining it as discrimination on the basis of only caste or tribe against members of "Scheduled Castes (SCs), Scheduled Tribes (STs), and Other Backward Classes (OBCs)". This was also the first time that the UGC was explicitly protecting OBC students from caste discrimination. The representation of OBC students on campuses has been rising ever since reservations for the category were introduced in higher education in 2006 and operationalised in the subsequent years.

The UGC introduced this term, along with stricter provisions for grievance redressal mechanisms and institutional accountability, to address concerns that the previous regulations had been inadequate. In 2019, the mothers of Rohith Vemula and Payal Tadi – students from marginalised caste and tribal backgrounds, who had died by suicide in 2016 and 2019, respectively, alleging caste discrimination – had approached the Supreme Court. They had emphasised that it was essential to revisit the 2012 regulations.

After seven years of hearings in the Supreme Court, the UGC notified the new regulations on January 13, 2026. Immediately, protests broke out. Students belonging to the general category principally took issue with the definition of 'caste-based discrimination' and the removal, from the final draft, of provisions to act against complaints believed to be false. They argued that the UGC's definition of caste-based discrimination made clear who could be a potential victim. This, they claimed, discriminated against "general category" or "upper caste" students by leaving them out of its scope. Several leaders from the ruling Bharatiya Janata Party (BJP) also opposed the regulations.

Petitions were filed in the Supreme Court of India, challenging these aspects of the 2026 regulations. On the 16th day of the agitation, a Bench led by the Chief Justice of India, Justice Surya



I entered DU with a score of over 80%. I was told I had 'gobbled up a seat' because I had availed myself of SC reservation.

ANIKET GAUTAM
Student
Delhi University

Kant, stayed the regulations, calling for the UGC to revert to the 2012 rules.

But by this time, the regulations and the discourse around them had already exposed a crack inside campuses along caste lines. Widening for over a decade, this crack simply culminated in a flashpoint this January.

Rising anger

One morning, outside the Delhi University (DU) Arts Faculty building in north Delhi, students shouted, "Tum jaitvad se todoge, hum rashtravad se jodenge (You break us with casteism, we will unite us through nationalism)". With more than a dozen officers of the Delhi Police keeping watch from across the road, students, mostly men studying law, began gathering at the gate. One of them held up a copy of the new regulations, explaining why these should be protested.

Naaveen Pandey, a third-year LLB student at DU's Law Centre 1, pointed to the definition of caste-based discrimination in a copy of the new regulations. "Does the UGC mean to say that caste discrimination is always going to be committed by general category students," he asked. "Are they saying that general category students do not face caste discrimination?"

Another student said, "This will only create further division on campus. Reading this, students from the general category may hang out only with other students from the same category, fearing false complaints."

In front of Lucknow University's Vivekananda Dwar, 489 km away, Mishra said, "These regulations allow swift action against accused students without sufficient safeguards. Our concern is not with acting against genuine offenders; it is that in the absence of provisions, those making false allegations will not be penalised."

Vishal Singh, a sociology student at Lucknow University, added, "As per the regulations, a supposed victim's identity will be kept confidential if requested. This is a big loophole. It will be exploited by divisive elements on campus. It is against the concept of natural justice."

In front of DU too, protesters argued that the secrecy of the complainant's identity would prevent them from defending themselves.

Students agitating against the regulations in Delhi, Lucknow, Varanasi, Allahabad, Gorakhpur, and Meerut said that the protests began to

take shape after solidarity groups emerged on social media platforms, including WhatsApp, Instagram, and X, where a "simple gist of the loopholes in the UGC regulations and their likely adverse consequences" were shared.

Outside the DU's Arts Faculty gate, Pandey pointed to one such chat group. "We left access to the group open so that students from all walks of life could join the protests," he said. "But let me show you what happened within hours of setting it up." He scrolled through the chat till he arrived at one message. It read, "Jisko UGC se upatti ho, vo gurukul taraf chale jaye. Wahan toh Dronacharya ji hain (Whoever has an issue with UGC can just go to a gurukul, or traditional Indian residential education system. There you will also find a Dronacharya)."

Pandey looked up. "What would you call this," he asked. "Is this not caste discrimination against those of the general category and upper castes?"

The message referred to the gurukul run by Dronacharya, a master archer and teacher of warcraft, in the Hindu epic, *Mahabharata*. Dronacharya was precluded from teaching anyone but the royal Kshatriyas of the kingdom of Hastinapur. The obligation forced him to refuse training to Eklavya, who belonged to a caste considered lower than the Kshatriyas.

He then scrolled further till he found another message, by a fellow student of the law centre, mocking the reservations for Economically Weaker Sections (EWS), introduced in 2019 by the Union government. Pandey said, "They call it the Sudama quota and make fun of us by calling us 'Sudama quota wale'. [Sudama, a poor Brahmin, is known as Lord Krishna's childhood friend in the *Mahabharata*.] Can we file a complaint against this under 'caste-based discrimination'?"

In one of the petitions filed before the Supreme Court challenging the 2026 regulations, Mrityunjay Tiwari, a post-doctoral researcher at the Banaras Hindu University, has cited slogans and graffiti in higher educational institutions as signs of caste discrimination against general category students or upper castes. The petition referred to slogans such as 'Brahmins leave the campus' being graffitied in December 2022 on a wall inside Jawaharlal Nehru University, and 'Brahmin-Baniyawad Mardabad (Down with Brahminism-Baniyawad)' being raised at Ashoka University in Haryana in 2024.

It also recalled chants by the Birs Ambekar Phule Students' Association in Jawaharlal Nehru University last year, echoing the Marathi slogan "tilak-tarazu-ur talwar, inko maaro joot chhar" – which means that the vermilion mark representing Brahmins, the balance scales representing the Baniyas or trading community, and the sword representing the Kshatriyas or warrior class should be hit with shoes.

"I can promise you that the students chanting these slogans do not understand the difference between Brahmanwad (Brahminism) and Brahmins," Pandey said, asserting that there is only one way of perceiving these slogans – hostility towards upper caste people. "How will these regulations help us report these complaints as caste-based discrimination?"

Neha Upadhyay, a first year LLB student at DU, who was among the few women at the protest, added that these new regulations "are further dividing the campus into caste categories". Explaining why she was at the protest, Upadhyay pointed to an incident she had seen on social media. "In Sri Ram College of Commerce (SRCC), a reserved category student complained of caste discrimination when a general category woman he had asked out on a date rejected him. How is this okay," she asked.

On January 29, the SRCC put out a public statement. Acknowledging the rumours circulating on social media, it clarified that "no such alleged act/incident has been reported in the college".

Being 'casteist'

While the protests highlight the divide between the reserved and unreserved categories, this rift

has been shaping experiences of students across higher education campuses for a few decades now. The death of Vemula in 2016 accelerated the formation and activism of student groups such as the Ambedkar Periyar Phule Student Circle, which advocate for stricter implementation of the 2012 anti-discrimination guidelines.

Even as Dalit, Bahujan, and Advaiti students narrated their lived experiences of caste discrimination – manifested in derision towards reserved categories, caste-based questioning, and "casteist" remarks passed off as "ice-breakers" – those from the unreserved category, or students from the general category or upper castes, said that it is they who are facing discrimination on campuses.

A 2019-20 student survey conducted among about 550 undergraduate students in the Indian Institute of Technology, Delhi, had found that 11% of respondents across the SC, ST, OBC, and general categories reported knowing professors or administrative staff who had made casteist remarks. The survey added that 6% of general category respondents, 9% of OBC respondents, and 26% of SC and ST respondents had reported this.

Observing the protesters chanting slogans outside the DU campus, Aniket Gautam, a postgraduate student at the political science department, said, "I come from an SC background. I entered DU with a score of over 80%. I remember the remarks I had received for 'gobbling up a seat' because I had availed myself of the reservation. Some people even said they wished they could get SC certificates to enter college campuses."

Gautam, who is associated with the Students' Federation of India, a Left-affiliated outfit, added, "If they want to label these casteist remarks 'banter', should we also say that referring to a 'Sudama quota' is banter? How is the EWS quota anything but a reservation for upper castes?"

Yet, a few dozen metres away, Pandey asked, "With these new regulations in place, would we ever be able to have free and democratic political discourse? We are terrified of what will happen when universities like DU hold student union elections. Will allegations made by some general students in the heat of campaigning be understood as caste discrimination?"

Drawing comparisons

While the agitation largely centred on the claim that the 2026 regulations divide campuses, some protesting students have also called for explicit representation of the general category in the monitoring and accountability mechanisms that the UGC plans to establish as part of the regulations.



They [students who are not in the general category or who are not upper caste] call the quota for Economically Weaker Sections the Sudama quota and make fun of us by calling us 'Sudama quota wale'. Can we file a complaint of caste-based discrimination?

NAVEEN PANDEY
Student, Delhi University

However, largely, the protesting students said that the 2026 regulations are better than the 2026 ones. Other sections of society also believe this, though for the opposite reason: they argue that the new regulations have diluted the definition of "discrimination," leaving its determination open to interpretation.

The 2026 regulations had defined 'discrimination' and covered varied forms of it, including specific types of discrimination faced by SC and ST students. On the other hand, the 2026 regulations have introduced the term 'caste-based discrimination' and shortened the definition of 'discrimination'. They have eliminated a sub-section on the types of discriminations faced by SC and ST students at various stages of their university education, such as admissions and interviews.

The 2026 regulations have provided for institutions to set up equity squads and equity committees, calling for fair representation in these mechanisms of SCs, STs, OBCs, minority groups, women, and persons with disabilities. The 2026 regulations had provided for the assignment of just one official as a liaison officer on campuses to monitor implementation of regulations.

The 2026 regulations also have stricter accountability measures, prescribing punishments for institutions found not following these rules. These include loss of accreditation and being debarred from offering degrees. These provisions were absent in the 2012 version.

While hearing petitions seeking the strengthening of the 2012 regulations, the Supreme Court was informed about the status of their implementation, including the establishment of SC/ST Cells and Equal Opportunity Cells (EOCs). According to an affidavit submitted to the Court by the UGC, only 3,522 higher educational institutions out of more than 50,000 in India had responded to the regulatory authority's call for reporting. Of these, 3,067 had set up an EOC and 3,273 had set up an SC/ST Cell.

But even as the Court stayed the 2026 regulations, the anger has not subsided. There are calls for a Bharat Bandh, or nationwide strike, on February 1, demanding a full rollback of the 2026 regulations. This anger has largely been directed towards the BJP by upper caste groups in parts of north India, particularly U.P., which is heading towards Assembly elections in 2027.

As Asad Rizvi, a Lucknow-based political observer, noted, "Upper castes are the core voter base of the BJP and the key driver of the party's success in the State. Upper caste office bearers of the party have even resigned from party posts in some districts, expressing displeasure with the UGC regulations. If they think the ruling party is not protecting their broader interests, it may negatively impact the BJP regime."

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Protests against the regulations, in Lucknow. SANDEEP SAXENA



Opinion

SATURDAY, JANUARY 31, 2026



● BETTING ON GROWTH

Chief Economic Adviser V Anantha Nageswaran

If global financial markets and the political situation do not deteriorate to the extent that sentiment gets affected in financial markets and in the business community, then I think the upper end is well within reach

● POWER POINT

BUDGET IS NO LONGER—IF IT EVER WAS—THE SOLE OR EVEN PRIMARY VEHICLE FOR REFORM

Resilience over applause

In an uncertain world, fiscal prudence and competitiveness matter more than ever

THE UNION BUDGET for 2026-27, to be unveiled on Sunday, is being framed under an unusually heavy cloud of external uncertainty. The global economy is fragmenting, geopolitics is intruding directly into trade and capital flows, and the rules-based order that once offered predictability is steadily eroding. For India, this means the familiar playbook of growth, fiscal management, and external financing can no longer be taken for granted. Trade is increasingly a theatre of strategic rivalry rather than simple commerce, with tariffs, subsidies, and technology controls deployed as instruments of statecraft. Add volatile energy markets, climate-related disruptions and the risk of financial contagion, and the backdrop for policymaking could scarcely be more challenging. Against this backdrop, the Budget's primary task is not to chase short-term applause but to reinforce resilience. India cannot fully insulate itself from global shocks, but it can reduce vulnerability.

That requires resisting fiscal adventurism even as demands for spending intensify. The credibility earned over recent years through gradual consolidation must not be squandered. Markets will scrutinise not just the headline deficit number, but the quality of expenditure and the realism of revenue assumptions. Public capital expenditure will rightly remain the centrepiece of the Budget, having supported demand and helped crowd in private investment. But that alone cannot carry the burden indefinitely. The next phase must focus on lowering the cost of capital, easing regulatory frictions, and restoring private-sector risk appetite. External uncertainty also sharpens the need to rethink India's growth drivers. Services exports have provided valuable ballast, but they cannot be the sole engine in a world where technology access, data flows, and visa regimes are increasingly politicised. Manufacturing exports, deeper integration into global value chains, and greater scale in goods production are no longer optional.

The Budget must therefore align incentives, trade policy, and logistics reforms to make Indian firms globally competitive, not merely protected. A volatile global environment also places a premium on domestic savings and financial stability. The Budget must avoid aggravating structural imbalances through populist measures. Fiscal prudence, however tempting politically, risks raising borrowing costs for households, firms, and the sovereign alike—precisely when global capital is becoming more selective and risk-averse. At the same time, uncertainty is no excuse for inaction. If anything, it strengthens the case for difficult reforms. Disinvestment and asset monetisation, sporadically pursued, need renewed urgency. Recycling capital locked in underperforming public assets can fund infrastructure, ease fiscal pressure, and signal seriousness to investors without adding to public debt. Equally important is support for the economy's shock absorbers—micro, small, and medium enterprises, exporters, and workers. Targeted credit support, faster refunds, simpler compliance, and predictable policy can help smaller firms navigate global turbulence.

The Economic Survey released this week revised India's potential growth rate upward from 6.5% to 7%—a respectable number. But potential growth means little if the external account remains hostage to global risk aversion and geopolitical fractures. In uncertain times, confidence itself becomes a policy variable. A credible medium-term fiscal path, transparent assumptions, and consistent messaging can anchor expectations even when external conditions deteriorate. This Budget will not have the luxury of optimism. But it does not need pessimism either. What it needs is realism—about the world as it is, the risks India faces, and the reforms required to grow despite them. In an age of global disruption, the strongest signal the Budget can send is that India is prepared—not just to weather uncertainty, but to outgrow it.

China's carmakers should take a page from Xiaomi

FOR THREE YEARS, China's auto sector has been defined by a profit-sapping price war. Now, one company is bucking the trend and changing more. If others follow, they could potentially deliver a critical win for the industry and for China. Xiaomi, the consumer electronics maker that outdid Apple by successfully breaking into the market for electric vehicles, earlier this month unveiled a new edition of its bestselling SU7 sedan. What surprised the public was the price: 229,900 yuan (\$33,000), a hike of 6.5%.

Facing a market contraction at home and protectionism abroad, this year will be challenging for Chinese carmakers. But if Xiaomi can build a genuine community of customers willing to pay a fair price, others should consider a similar approach. Doing so would put the sector on a more secure footing, and those that don't survive can help spark a period of healthy consolidation. Tesla kicked off the discounting trend when it slashed prices on its Shanghai-made models in October 2022. Eventually, others joined in, creating a cycle of *neijuan*, or involution, a broad social concept that refers to this case to intense competition marked by price wars. The government began to crack down on the phenomenon in the middle of 2025. In fact, a week after the Xiaomi launch, China's top market regulator gathered major car makers to warn them, yet again, against aggressive discounting.

A company raising prices in response to demand may seem like a simple business truism. But that's been the paradox of the China car market: sophisticated technology at affordable prices. BYD is a prime example. In February last year, it set the bar for providing an advanced driver assistance system in some of its most basic models without raising prices, sending its shares to a record high—an example rivals would follow. So far, no other major manufacturer is jumping on the Xiaomi bandwagon. More than a dozen brands including BMW and Volkswagen have cut prices or rolled out incentives since the beginning of the year to lift sales, according to Bloomberg News.

Perhaps Xiaomi's trajectory is too unique to mirror exactly. Chief Executive Officer Lei Jun built the company into the world's third-largest handset maker around its Android-based software from its 2010 origins in Beijing. A year later, it launched mobile phones and now has more than 18,000 retail stores selling everything from washing machines to robot cleaners.

Lei has maintained a massive following on social media and no doubt has leveraged it to grow the EV business. (His status as one of the original CEO influencers is said to be saving Xiaomi one billion yuan in marketing costs a year.)

But while his influencer status may be hard to emulate, other carmakers should consider whether they have—or can build—a connection with customers to enable them to raise prices. This is particularly important in a year when costs are rising.

Higher prices for essential metals have increased the production cost of battery cells by 15% in the past three months, according to Bloomberg Intelligence analysts Joanna Chen and Jason Zhao. The chief executive of EV maker Nio, William Li, has reportedly said the price of memory chips is surging like "crazy". But he has downplayed the idea of passing the costs to consumers, in another sign of the fierce fight for their patronage. With 150 different brands producing passenger vehicles, China's car industry is too big for its own good. While consolidating won't be easy, that's exactly the path it should take. Even if the government's crackdown on discounting seems to be working, it is not enough. Collective profits for the automobile industry eked out a small gain last year, compared to a 8% decline in 2024.

As I've written before, China's ambitious but risky bet on its industrial giants hasn't yet paid off economically. By daring to raise prices, Xiaomi is taking things in the right direction. But many others must follow for the strategy to be a success.



JULIANA LIU
Bloomberg

THE UNION BUDGET has steadily acquired the trappings of a national event. Markets hold their breath, television studios turn theatrical, and expectations build that a single speech will unveil tax cuts, reform breakthroughs, and growth accelerators all at once. Yet a closer examination of policymaking under Finance Minister Nirmala Sitharaman suggests that this annual hype is increasingly unwarranted. Many of the most consequential economic measures of recent years have been conceived, announced, and implemented well outside the Budget framework.

This is not a peculiarity of one year or one government. It reflects a deeper shift in how economic governance now works. In a large, complex, and fast-changing economy, policymaking has become continuous rather than episodic. The Budget remains important, but it is no longer—if it ever was—the sole or even primary vehicle for reform.

Consider some of the most impactful decisions taken during this government's tenure. The sharp cut in corporate tax rates in September 2019, which reset India's investment proposition, was introduced through an Ordinance, not a Budget speech. The production-linked incentive (PLI) schemes, which now underpin India's manufacturing push across electronics, pharmaceuticals, and automobiles, were rolled out through cabinet approvals and detailed notifications, largely outside the Budget spotlight. Labour law reforms—long regarded as politically fraught but economically necessary—were enacted through Parliament, not announced in Budget day.

The same pattern is visible in the financial sector reform. The clean-up of bank balance sheets, recapitalisation of public sector banks, consolidation of state-owned lenders, and repeated refinements to the Insolvency and Bankruptcy Code were not Budget-centric exercises. They unfolded over several years through regulatory

action, legislation, and administrative decisions. Market reforms—from changes in bond market microstructure to tighter disclosure norms and improved settlement systems—have similarly emerged through regulators rather than Budget pronouncements, yet have arguably done more to deepen India's financial architecture than many headline fiscal measures.

Even in fiscal management, where the Budget ostensibly reigns supreme, reality is more incremental. Subsidy rationalisation, adjustments to food and fertiliser support, changes in import duties, calibrations of windfall taxes, and shifts in capital expenditure priorities have often been executed between Budgets. These decisions, taken in response to inflation shocks, global commodity swings, or supply disruptions, can materially influence growth and fiscal outcomes—yet they rarely command the attention reserved for February 1.

This divergence between perception and practice helps explain why Budgets are often declared "disappointing". Each year, commentators and markets load the exercise with unrealistic demands: sweeping tax cuts, instant consumption revival, transformational reforms across land, labour, and capital, and painless fiscal consolidation. The Budget, constrained by arithmetic, politics, and macroeconomic realities, can seldom meet these expectations. When it does not, the verdict is swift

and harsh, even if the document performs its core function competently.

To be clear, the Union Budget is not irrelevant. It remains the principal statement of the government's fiscal strategy. It allocates resources, signals priorities, sets deficit targets, and anchors accountability to Parliament. But its role is frequently overstated, especially in an era when many policy levers lie outside the annual budgetary cycle.

Indeed, some of the most far-reaching decisions are better taken away from Budget day precisely because they require flexibility. Tax rate changes, for instance, may need to respond to global developments or domestic shocks rather than an annual timetable. Regulatory reforms often demand consultation, iteration, and sequencing that do not lend themselves to one-off announcements. Structural changes—in labour markets, logistics, energy, or digital governance—are typically legislative or administrative in nature, unfolding over multiple years.

There is also a political economy dimension. The Budget has become such a high-stakes event that it can deter boldness rather than encourage it. Announcing major reforms in a televised speech, with instant market and political reaction, raises the cost of missteps. By contrast, rolling out reforms incrementally—through consultation papers, pilot projects, or ph-

ased notifications—allows course correction and reduces disruption. In that sense, the shift away from Budget-centric reform may reflect greater policy maturity.

The obsession with the Budget also distorts public understanding of economic governance. It fosters the illusion that growth, investment, and jobs can be jump-started by a single fiscal document, rather than by sustained improvements in regulation, administration, and state capacity. It encourages a short-term focus on giveaways and headline numbers, at the expense of longer-term institutional reform. None of this is to deny that Budgets matter politically or symbolically. They remain moments of democratic accountability, when the government lays its fiscal cards on the table. They shape narratives and signal intent. But narratives are not outcomes, and intent is not implementation. The real work of reform happens in the months and years between Budgets—in ministries, regulators, and legislatures.

Perhaps the problem, then, is not with the Budgets themselves, but with the expectations placed upon them. As India's economy grows larger and more complex, governance will inevitably rely more on steady, technocratic decision-making and less on annual set pieces. A more mature public discourse would recognise this shift. Dismantling down the hype around the Union Budget would not diminish its importance; it would put it in proper perspective. It would allow Budgets to be judged on what they are meant to do—manage public finances responsibly—rather than on what they cannot realistically achieve. And it would focus attention where it increasingly belongs: on the quieter, less glamorous but far more consequential business of policymaking beyond the Budget glare. India's economic ambitions will be better served when decisions are taken when they are needed, not when the calendar demands a grand annual rally. As former US Treasury Secretary Larry Summers once said, "Economic policy is not an event; it's a process."

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As India's economy grows larger and more complex, governance will inevitably rely more on steady, technocratic decision-making and less on annual set pieces

Only policy can build confidence



SEEMA KEJRIWAL

Partner, BMR Legal Advocates

If Budget focuses on narrowing overly broad definitions, issuing practical circulars, and removing friction points, it can create the tax environment global investors look for

A CLEAR PATTERN in India's tax landscape is now hard to miss—the Supreme Court (SC) has, in several cases, overturned high court rulings that favoured taxpayers. While a SC verdict brings finality, it exposes a larger structural concern. Businesses continue to operate under laws whose scope is wide, interpretation often varies, and impact becomes clear only after years of litigation. In such an environment, long-term investment and commercial planning inevitably suffer.

At the same time, a stable tax policy cannot mean drafting laws with broad, catch-all provisions. Laws that can technically apply to almost every situation but are enforced only in some cases create unpredictability. Selective enforcement, whether intentional or incidental, adds a layer of arbitrariness fundamentally at odds with sound tax policy. Similarly, circulars that heavily favour the administration tend not to be used by taxpayers, yet they influence audit positions on the ground. This makes them ineffective as guidance and distortive in practice.

The experience with India's safe harbour rules is a case in point. Introduced to calm high-pitched transfer pricing assessments, they were intended to provide a simple, low-dispute path for routine transactions. But the rigid conditions and unrealistic margins have kept most taxpayers away. Recent efforts to widen eligibility are welcome but they don't address the core problem. If the safe harbour is misaligned with commercial reality, companies will avoid it while the revenue department

may continue to treat it as a de facto floor.

On the other hand, detailed operational guidance has historically worked better. The Central Board of Direct Taxes' (CBDT) 2013 circulars for R&D centres helped resolve long-standing confusion on how Indian captive units should be characterised. The rollout of Place of Effective Management regulations to tax passive offshore income of non-resident firms controlled from India showed similar restraint, with clear carve-outs, particularly the turnover threshold of 50 crore, preventing unnecessary scrutiny. These examples demonstrate that clarity and specificity reduce disputes without eroding the tax base.

The SC's decision in the Tiger Global case has, however, raised a new concern—the status of CBDT circulars themselves. By holding that older circulars may no longer apply if the legal landscape has changed, it has introduced uncertainty for businesses that have long relied on such guidance. A straightforward clarification from the CBDT that a circular remains valid until explicitly withdrawn would go a long way in restoring predictability. Understandably, some circulars have outlived their importance and should be withdrawn with an explanation.

The upcoming Budget also presents an opportunity to address provisions where broad drafting creates avoidable friction.

One example is India's withholding tax mechanism for payments to non-residents. Buyers often face a heavy burden of deduction on payments to non-residents even when treaties clearly grant relief, leading to extended negotiations and transaction delays. A clear circular outlining situations where withholding is not required will meaningfully ease investment flows.

Transfer pricing is another area in need of sharper boundaries, especially in the new Income Tax Act. The concept of "control", which underpins several definitions, remains abstract and subjective. Courts had historically linked it to concrete indicators like shareholding to avoid unnecessary disputes; but a recent SC ruling has not only created a new frontier for tax and transfer pricing disputes in India but may also create precedent for Indian brands seeking to grow global franchises.

Employee Stock Ownership Plan taxation remains an area of practical difficulty. Today, companies issue a wide range of instruments like phantom units, restricted stock units, reverse-vesting shares, etc. A CBDT circular explaining valuation and timing of taxation for each would help global firms implement consistent, compliant employee incentive plans. Most high court matters decided in favour of taxpayers are now awaiting the apex court to hear the revenue's case, which the tax-

payers would be expected to defend.

Across emerging sectors, regulation hasn't kept pace with rapidly evolving business models. Gaps remain—for instance, unclear rules on digital lending algorithms, emerging battery-storage frameworks, tax treatment of crypto-assets, and classification of platform-based digital services. Giving businesses a clear, safe pathway that protects them from penalties when genuine interpretive differences arise would go a long way in building confidence across emerging industries.

As the Economic Survey reminds us, investors do not benchmark a country against its own past; they compare with all other available opportunities. Change in goal posts—be it by way of law, administrative practices, or reversals of lower court decisions—often rattle them. Perceptions of tax certainty, administrative fairness, and regulatory clarity matter as much as headline policy reform. India's tax system does not lack legal provisions. It lacks predictability and periodic guidance or its consistency. Courts can close disputes, but they cannot build the confidence needed for new investment. That responsibility rests squarely with policy. If the Budget focuses on narrowing overly broad definitions, issuing practical circulars, and removing avoidable friction points, it can create the tax environment global investors look for—fair, clear, and dependable. That is what will ultimately strengthen India's position as a preferred investment destination.

LETTERS TO THE EDITOR

Shift towards equities

The Economic Survey highlights a cultural shift from traditional savings towards equities. In absolute terms, individual investor holdings have risen to ₹84 lakh crore in September 2025 from ₹8 lakh crore in FY14, even as deposits fell from 58% in FY12 to 35% in FY22. This must be seen to signal a structural maturity rather than fixation on returns. Our economy resembles earlier phases of advanced economies

in the 1980s-90s, when households gradually migrated from deposits to capital markets as inflation fell, financial intermediation deepened, and market access widened. Deposits still dominate, but equities are being layered on top. That said, uncertainty would linger over low real deposit returns, asset inflation, and anxieties on future employment and retirement. Equity participation is being shaped as much by aspiration as by anxiety, reflecting confidence in our growth

story and a hedge against macro-financial stress.

—R Narayanan, Navi Mumbai

Need for reform

Apologies of "Reform or drift" (FE, January 30), the government has managed fiscal deficit well and projected GDP is at 6.8-7.2%, but sustaining that in a complex geopolitical scenario will be tough. Also, if foreign investors are hesitant about India due to complex tax rules and regulatory hurdles, the

government must address it seriously. Indeed, the government, private sector, and households have to do their part to keep our economy on the right trajectory. High capital cost and a lack of optimum utilisation of current facilities is forcing the private sector to invest in greenfield projects. Cutting red tape at all levels and fast-tracking legal reforms will help the economy.

—Bal Govind, Noida

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{ OUR TAKE }

Unleashing animal spirits

Amid the global churn, the budget must convey the message to the political executive and bureaucracy that it can't be business as usual

Everybody in India has demands of the budget. The range varies from structural reforms to specific reliefs such as taxes or a new scheme targeted at a poll-bound state. The government, of course, has its own priorities such as the fiscal glide path. In normal course, the balance is often decided by the larger political economy cycle; pre-election budgets tend to be more populist while prudence is prioritised when political concerns are not so pressing.

The Narendra Modi government prioritised prudence even in its pre-election budget before the 2024 Lok Sabha elections. The markets rewarded it — India received three ratings upgrades last year — but there is good reason to believe that the BJP did lose a bit of political capital because of this decision. It has more than recovered from those setbacks by now.

The 2025-26 Economic Survey, tabled in Parliament on January 29, suggests that fiscal prudence will continue to guide the budget's approach this year as well. This also means that the budget might not score very big on the populist parameter. So far, so good.

However, the Survey has also made it clear that just a balanced fisc is not going to be enough to take India forward on the path of becoming a developed country. It has said so because it believes that the external environment has changed discernibly, and a large disruption awaits despite India doing nothing wrong in the domestic economy. This, in a way, raises the bar for the budget which will be presented on Sunday. Being responsible is not going to be good enough. The need of the hour is to be radical.

What more can the budget do to build a firewall against external headwinds and rejuvenate animal spirits in the domestic economy? The survey has made it clear that the approach cannot be one of autarky or giving up on manufacturing. That the Economic Survey and the Union Budget are being presented in the same week when India signed an FTA with the EU, which embraces trade openness at a level hitherto not seen in India, is not just a coincidence. What is even more important is the Survey's suggestion that India's problem is not so much about intent and ideas for reform, but the inability to align the larger incentives to make sure that all economic stakeholders act in sync. It has been courageous enough to flag that the bureaucracy is often risk averse rather than proactive, the political class is populist rather than prudent, and even capital is pursuing narrow interests rather than acting in a way which would further national interest. Unless this vicious cycle is broken, India's economic trajectory will continue to face an almost insurmountable gravity.

Can the budget take this problem head on? Last year, it announced steps such as an Administrative Reforms Commission. The finance minister, while speaking at the Hindustan Times Leadership Summit last year, highlighted the importance of convincing states to not get carried away by the short-term political gains of measures such as cash transfers. Will the 16th Finance Commission awards — they will likely be tabled along with the budget on Sunday — provide any institutional nudges to improve the quantity as well as the quality of states finances without making the states feel that their fiscal autonomy is being squeezed?

One could go on adding individual things to the list — but the larger point is more important. The world, as we know it, is changing. The transition will not be painless. Business as usual cannot be an option for India at this moment. The budget must convey this larger message unequivocally.

The moment has come for reliable renewable power

Budget could push renewable energy round-the-clock to the centre of India's power strategy

Budget 2026 will be a decisive moment for India's energy transition and the Viksit Bharat 2047 goal. State utilities and public sector buyers are expected to sign long-term power purchase agreements that will shape India's electricity mix — and public finances — for the next two decades. These contracts, often running for 20-25 years, will determine whether India's future power system remains anchored to coal or pivots towards clean, reliable alternatives.

This inflection point comes when India's renewable energy story is both impressive and incomplete. Installed renewable capacity has crossed 260 GW, and non-fossil sources now account for over half of total installed power capacity, well ahead of the country's 2030 commitment. Yet, India's past energy budgets, through public spending and policy support, prioritised capacity creation over system reliability. Despite rapid renewable growth, coal still dominates electricity generation during evening and night-time peak hours, when demand and rising variability are already imposing high costs on the power system.

Electricity demand is projected to grow at 6-7% annually through the next decade. Faced with the political and economic risk of power shortages, states are increasingly tempted to fall back on coal-based procurement as the "safe" option.

In the absence of firm and dispatchable clean power, India risks locking itself into a paradox where renewable energy grows on paper, but coal remains indispensable in practice. Renewable energy round-the-clock (RE-RTC) must move to the centre of India's power strategy.

By combining solar, wind, energy storage and flexible generation into a single dispatchable product, RE-RTC closes the reliability gap

that has long limited renewable energy's ability to meet baseload and peak demand, reframing clean power not as an alternative but as a credible substitute for conventional thermal generation. The economics are now aligning with this shift. Battery energy storage costs have fallen by over 80% over the past decade, and recent Indian bids show storage-backed renewable tariffs in the range of ₹21-28 per unit for storage services, making bundled RE-RTC power increasingly competitive with new coal. Crucially, RE-plus-storage projects can be commissioned within two to three years, allowing the power system to respond more quickly to rising demand.

Yet this raises a more fundamental policy question for Budget 2026: If reliability is now the binding constraint of India's clean energy transition, are public finances aligned with this goal? And if RE-RTC is to become the backbone of India's future power system, where must the budget intervene to unlock it at scale?

Transmission infrastructure remains the second critical bottleneck. Renewable capacity has expanded far faster than evacuation and balancing infrastructure, leading to congestion, curtailment, and under-utilisation across multiple renewable-rich corridors. Studies by the Central Electricity Authority indicate that transmission additions are lagging demand growth and renewable deployment, with several interstate corridors already operating under stress.

Budgetary support must, therefore, prioritise high-capacity green energy corridors, dynamic line rating technologies, advanced substations and grid digitalisation. Capital support through special funds in current budgetary frameworks, while faster regulatory approvals and risk-sharing mechanisms, is essential to ensure that renewable power can move seamlessly from generation centres to demand hubs.

Storage is the second pillar of reliability and the weakest link in current budgetary frameworks. While falling battery costs have attracted private interest, grid-scale storage remains capital intensive and commercially risky without public support. Budget 2026 must



Aparna Roy

How customs reform can help India's export strategy

The government of India had set an ambitious target of achieving \$1 trillion in merchandise exports. However, India remains far from realising this goal, with merchandise exports standing at around \$437 billion as of FY 2024-25. This shortfall is also reflected in India's low and largely stagnant share in global exports, which has hovered around 2% for some years. In the current global environment, characterised by supply-chain realignments, India has an opportunity to significantly expand its export footprint. To seize this opportunity, the Union Budget 2026 should prioritise a competitiveness-led trade reform agenda. A guiding principle to keep in mind is that cost-efficient imports are essential for scaling exports. Accordingly, a key element of any competitiveness strategy must be the facilitation of imports of intermediate and capital goods, which are critical for domestic production, export competitiveness, and deeper integration into global value chains.

Following significant reforms in FY 2025-26, including income tax and Goods and Services Tax rationalisation, the next major reform priority should be customs, as indicated by the finance minister, Nirmala Sitharaman, at the HT Leadership Summit. Customs reforms are essential to facilitating ease of importing, which in turn supports higher exports. In this regard, there are several concrete areas where the Union Budget can deliver meaningful gains. This article discusses three broad aspects of customs reform.

First, rationalisation of the customs duty structure is essential to simplify import compliance and attract greater foreign investment. Currently, imports into India are subject to multiple layers of duties and cesses, making the process of importing both burdensome and costly. While last year's budget reduced the number of basic customs duty (BCD) slabs to eight by merging several rates, many products were made subject to additional levies such as cesses, the social welfare surcharge (SWS), and the agriculture infrastructure and development cess (AIDC), which has meant there is little change in the effective customs duty ultimately faced by importers.

If the aim is to meaningfully improve the ease of doing business in India, this layered tariff structure needs to be addressed in the upcoming budget. At present, India's customs schedule combines relatively high tariff rates with a complex duty structure, which sends adverse signals to foreign producers considering locating their operations in the country. To this end, it is also important to present a comprehensive view of all applicable import duties and charges, including customs duties, anti-dumping duties, other levies, and GST, so that importers can properly assess the total cost of importing a product.

As a step towards participatory conservation and the wise use of wetlands, the government launched Mission Sahibganga in May 2022. This aims to enable community-driven efforts for the conservation and management of India's wetlands. The Save Wetlands Campaign was also launched as part of this Mission. India's approach to wetland conservation is inspired by the belief that transformative change begins with individuals and commu-

Second, and closely related, is the urgent need to correct the problem of inverted duty structures (IDS) in the customs schedule, particularly where intermediate inputs and capital goods face higher tariffs than the final goods. As of 2023, nearly half of India's imports consist of intermediate inputs, capital goods, and raw materials that face tariff rates above 5%.

This suggests potential cost inefficiencies when downstream industries utilise these inputs. For instance, sorbitol, a key intermediate used in pharmaceutical production, attracts a BCD of 20%, while several finished pharmaceutical products face a lower BCD of 10%. Similarly, in the automobile sector, certain truck parts attract a BCD of 15%, whereas fully built truck imports are taxed at 10%. In the electronics sector, static converters, critical intermediates, are subject to a BCD of 20%, while compressors that use these converters attract a lower BCD of 15%.

Such cases illustrate the persistence of inverted duty structures, which weaken domestic supply chains and discourage efficient production. As a guiding principle, intermediate goods across the customs schedule should attract lower tariff rates than finished products, to support cost-effective manufacturing and deeper global value chain integration. Addressing these distortions should, therefore, be a priority in the upcoming Union Budget.

Third, the focus must shift to customs procedures and port-level delays, which continue to disrupt supply chains and can adversely affect the timely fulfilment of export orders, an increasingly important determinant of competitiveness in global markets. Delays in customs clearance raise transaction costs, create uncertainty for exporters, and weaken India's reliability as a production and sourcing destination.

To address this, the Union Budget should allocate resources for faster and more efficient customs clearances, with a strong emphasis on end-to-end digitalisation of customs processes. Such reforms would not only improve supply-chain efficiency but also enhance India's attractiveness for global value-chain participation. For India to achieve its export targets and establish itself as a strong player in global value chains, it must adopt an import strategy that enables access to cost-efficient inputs. In this context, customs reform can play a critical role by addressing key challenges such as the multiplicity of duties, inverted duty structures, and delays in customs clearance. If designed and implemented effectively, customs reforms can help India leverage emerging opportunities in the global economy and provide a much-needed boost to the manufacturing sector.



Purna Prabhakar



Budget 2026 must recognise that the success of the energy transition will be judged not by megawatts installed, but by megawatts delivered.

HT ARCHIVE

move beyond pilot allocations and create a clear financial architecture for storage deployment. This includes viability gap funding for battery energy storage systems, concessional long-tenure financing through public sector lenders, and targeted support for domestic storage manufacturing under existing production-linked incentive (PLI) frameworks. Pumped hydro storage, which offers long-duration balancing critical for multi-day reliability, also requires upfront public investment for site development, transmission connectivity and environmental clearances. Without these interventions, storage will scale too slowly to meet the reliability demands of a high-renewables grid.

Equally important is the procurement and market design framework that underpins power reliability. India's electricity system remains locked into long-term coal-based power purchase agreements that prioritise fixed capacity over flexibility. These contracts constrain utilities' ability to procure innovative products such as RE-RTC and impose long-term financial liabilities as costs rise. Budget 2026 should support reforms that enable aggregated RTC procurement, facilitate market-based ancillary services, and strengthen real-time and day-ahead power markets. Public funding for digital platforms, forecasting tools and system operators can significantly improve grid responsiveness and reduce balancing costs, making RTC renewables commercially viable at scale.

India's renewable sector attracted a record

\$3.4 billion in foreign direct investment in FY25, reflecting strong global appetite for clean energy assets with predictable returns. Yet investors increasingly differentiate between capacity and reliability. Projects that offer firm power, long-term offtake certainty and grid integration attract lower-cost capital. Budgetary instruments such as sovereign-backed guarantees, blended finance facilities and credit enhancement mechanisms can help crowd in international finance for RE-RTC projects, lowering the cost of capital and accelerating deployment without overburdening public finances.

By displacing coal generation across all hours of the day, RE-RTC delivers sustained reductions in air pollution, not just marginal emissions gains. Cleaner air translates into lower health expenditures, higher labour productivity and improved quality of life-outcomes that are central to a developed economy but rarely priced into energy planning. As the climate crisis increasingly disrupts economic activity, the resilience benefits of a clean, flexible and reliable power system will only grow. Budget 2026 must recognise that the success of the energy transition will be judged not by megawatts installed, but by megawatts delivered — reliably, affordably and cleanly. Anchoring public spending around RE-RTC is not a departure from India's clean energy strategy; it is its necessary evolution.

Aparna Roy is fellow and lead, climate change and energy, ORF. The views expressed are personal

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Conserving wetlands to nurture nature, society

The World Wetlands Day marks the signing of the Ramsar Convention, a treaty for the conservation and wise use of wetlands globally. The theme for this year, *Wetlands and traditional knowledge: Celebrating cultural heritage*, rings close for India as it spotlights the timeless role of traditional knowledge in sustaining wetland ecosystems and preserving cultural identity. The importance of wetlands in sustaining vital ecosystems, forming a critical link between land and water with lakes, rivers, floodplains, marshes, mangroves, peatlands, and lagoons, can't be stated enough. They are agents of water security, climate regulation, food production, and livelihoods. Wetlands have sustained India's civilisational journey for millennia, from the Himalayan high-altitude lakes to the floodplains of the Ganga and

the Brahmaputra, from the tanks of the Deccan plateau to coastal mangroves and lagoons. Over the past decade, the Union government has strengthened wetlands conservation through policy reforms, institutional mechanisms, and international engagement. One of the most notable achievements has been the rapid expansion of India's Ramsar network. The number of sites has risen to 96 in 2026 in 2014 (an increase of about 26%) — the highest in Asia, and third-highest in the world. The network currently covers 1.36 million hectares (10% of the known wetland extent of the country). A recognition of Udaipur and Indore as Wetland Cities stands testimony to embedding wetlands in urban development plans and programmes.



Bhupendra Yadav

Wetlands conservation in India is supported by a strong foundation of environmental laws and regulations. The national environmental policy recognises wetlands as a vital freshwater resource and calls for their prudent use. A national-level programme for conservation and management of wetlands has been in place for over four decades. MOEFCC's flagship scheme, the National Plan for Conservation of Aquatic Ecosystems (NPCA), aims to mainstream the full range of wetland biodiversity and ecosystem services within developmental plans and programmes at various levels.

As a step towards participatory conservation and the wise use of wetlands, the government launched Mission Sahibganga in May 2022. This aims to enable community-driven efforts for the conservation and management of India's wetlands. The Save Wetlands Campaign was also launched as part of this Mission. India's approach to wetland conservation is inspired by the belief that transformative change begins with individuals and commu-

ties. The nationwide network of wetlands *mitras* (friends of wetlands) mobilises citizens, youth, and local communities as stewards and ambassadors of wetlands. At the 15th Conference of Parties of the Ramsar Convention held in 2025, in Zimbabwe, India introduced and secured the adoption of the resolution on Promoting Sustainable Lifestyles for the Wise Use of Wetlands, marking a global endorsement of Mission LIFE as a tool for wetland governance. A key feature of our approach has been the growing recognition that conservation cannot be separated from culture and livelihoods. By acknowledging this, the Centre has sought to move towards participatory governance. Conservation and management interventions ensure integration of traditional knowledge and practices for wise use. By placing culture at the heart of wetland conservation, India is strengthening community-led stewardship, enhancing climate resilience, and ensuring wetlands nurture both nature and society.

Bhupendra Yadav is Union minister for environment, forest & climate change. The views expressed are personal

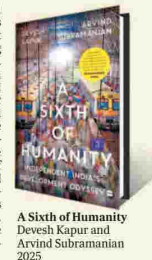
{ EDITOR'S PICK }

HT's editors offer a book recommendation every Saturday, which provides history, context, and helps understand recent news events

MAPPING INDIA'S DEVELOPMENT PATH

With the Union Budget due on February 1 — amid external headwinds — the focus is on keeping to a development path that serves India well. To do this, learning from history is as important as looking to the future.

Against this backdrop, political scientist Divesh Kapur and former chief economic adviser Arvind Subramanian's *A Sixth of Humanity: Independent India's Development Odyssey* offers clear-eyed insights. The book looks back at the journey so far, unravelling implicitly in each case why familiar narratives about India's economy may not always be adequate. A key part of the book outlines the paradox of a State that both overreached and undershot remit in specific contexts.



A Sixth of Humanity
Divesh Kapur and
Arvind Subramanian
2025

the hindu **businessline.**

SATURDAY • JANUARY 31, 2026

Golden lessons

Sovereign gold bonds offer some policy lessons

As gold prices head for the stratosphere, this is turning up the heat on an unexpected entity, the Government of India. As rising global prices and a depreciating rupee propel bullion prices to over ₹16,000 per gram, the Government is having to sharply hike its budgetary allocation to redeem maturing Sovereign Gold Bonds (SGBs).



A report in this newspaper estimates that in the upcoming Budget, the ₹700 crore outlay earmarked for the Gold Reserve Fund may need to be revised significantly higher. FY25 outlays for these bonds turned out to be over three times the budgeted number. This may be a recurring issue for the government as long as gold prices remain elevated. The government issued 67 tranches of SGBs between FY16 and FY24. The FY18 and FY19 tranches coming up for redemption now, were issued at a face value of between ₹2,800 and ₹3,300 per gram, while current market prices hover at over ₹16,000 per gram. While the government has been getting a lot of flak for this miscalculation, the criticism is unfair.

When they were first introduced in 2015, SGBs were seen as a policy instrument to allow Indian households to park their savings in their favourite asset, without adding to the country's import bill or skewing its current account balance. At that time, gold had delivered a mere 5 per cent return in the previous five years and ruled at ₹2,600 per gram. Initial SGB issues in fact met with tepid response, despite the government sweetening the offer with an annual interest and a capital gains tax exemption. At the time, hardly any market participants anticipated that gold would soar to such astronomical heights. It must also be recognised that while the SGBs have proved a very expensive form of borrowings for the government, they have delivered stellar returns to retail investors who bought them. This is not such a misfortune. Even after recent gold price gains, SGBs account for less than ₹2 lakh crore of outstanding government borrowings, which is quite manageable for the fisc.

Having said this, there are useful policy lessons to be drawn from the SGB experience. One, whenever the government decides to rely on non-Rupee denominated borrowings, it would be prudent to hedge against price risks. In this case, buying physical gold to match outstanding SGBs would have been self-defeating, but hedging against adverse price movements in the currency or commodity derivative markets could have been explored. Two, the government probably went overboard in offering complete capital gains tax exemption on SGB proceeds, at a time when other forms of bullion investments were taxed.

Finally, when issuing market-linked instruments, regular investments that smooth out price risks are better than lumpsum investments that are highly influenced by point-to-point price movements. This holds good both for the buyer and seller. Any future gold deposit scheme to two retail savers should learn from mutual funds' Systematic Investment Plans.

OTHER VOICES.

The Guardian

Military strikes won't help civilians facing brutality

The brutality of Iran's crackdown on protesters is almost unfathomable. Despite the authorities cutting off communications and destroying evidence, it is clear that a regime never reluctant to shed its citizens' blood has done so with unprecedented zeal, sensing an unprecedented threat from unrest across the country, challenging not only its policies but its very existence. Officials have reported 3,000 deaths, but human rights groups have killed many more, and a network of medical professionals has estimated that 20,000 could have been killed. Security forces shot people dead as they fled a fire and are arresting doctors for helping the wounded. Alongside the fury at this vengeful regime is anger at another leader: Donald Trump, who urged Iranians to keep protesting and promised them that "help is on its way" — then played down the slaughter. LONDON, JANUARY 29

CHINADAILY

Military adventurism risky Middle East bet

The clamor caused by the United States' unilateral actions against Venezuela and its land-grab attempt of European territory shouldn't mask the fact that tensions in the Middle East have reached a critical point due to its transactional geopolitical calculus. Over three months after the first phase of the ceasefire deal in Gaza was reached, Israeli military strikes have yet to stop. As China's Permanent Representative to the United Nations Fu Cong urged in a UN Security Council meeting on Wednesday, it is incumbent on all parties, Israel in particular, to fully comply with the ceasefire agreement and work toward a comprehensive and lasting ceasefire. The humanitarian situation in Gaza remains grave. BEIJING, JANUARY 29

Quantum deadline: Adapt or be exposed

NATIONAL SECURITY ISSUE. Regulators, governments must respond to impending cyberwarfare threats and prepare post-quantum cryptography plans

AJAI CHOWDHRY
AJAY SINGH

The capture of Nicolas Maduro succeeded not through sheer military might but through digital disruption, sending shockwaves across the world, showing that cyberwarfare can topple regimes without traditional combat. Yet as disruptive as this was, it pales in comparison to the looming quantum threat — "Q-Day" — the moment when quantum computers will be capable of breaking today's encryption standards, unleashing systemic havoc across every sector of society.

Knowing that classical encryption like RSA and ECC is vulnerable to quantum algorithms, adversaries are undertaking "harvest now, decrypt later" attacks through which they are stockpiling encrypted data today to unlock tomorrow. Without migration to post-quantum cryptography, sensitive financial, military, and health records face exposure. This is not just an IT issue; it is a critical boardroom priority and national security challenge demanding urgent action.

Imagine a scenario where global banking systems collapse overnight as transactions are decrypted and manipulated, accounts drained, payment networks disrupted, and stock exchanges thrown into chaos. The ripple effects would trigger market crashes, erode trust in financial institutions, and destabilize economies worldwide.

Also consider the possibility of military communications, satellite controls, and encrypted command

systems being taken over. Adversaries might spoof signals, disable radar, or hijack drones, on a global scale, undermining deterrence and sovereignty.

In another scenario, hospitals could lose access to patient records, with data stolen or altered, endangering lives, while power grids, water systems, and telecom networks are simultaneously disrupted, plunging cities into chaos. The interconnectedness of modern infrastructure means that a quantum-enabled attack could cascade across multiple sectors at once.

The urgency of preparing for Q-Day cannot be overstated. The three-year horizon suggested by IonQ's CEO Niccolò de Masi is already alarmingly short.

Bain's latest study delivers a wake-up call. The study predicts that 70 per cent of executives expect quantum-enabled cyberattacks within five years while the rest believe it could happen in just three. Yet most organizations are still stuck in passive mode—waiting for someone else to lead the response.

Quantum computing research is accelerating, and breakthroughs often arrive earlier than expected. Complacency is dangerous. Moreover, the "harvest now, decrypt later" strategy means that even if Q-Day is years away, the damage is already being prepared. The threat is not hypothetical; it is active

Regulators should enforce post-quantum cryptography adoption in banks, payment networks, and stock exchanges, with quantum-safe protocols for SWIFT transfers

and ongoing. Regulators across sectors should prepare detailed post-quantum cryptography (PQC) migration plans, replacing vulnerable methods like RSA and ECC with quantum-resistant algorithms even before the more powerful quantum computers arrive may be from China.

Organizations must also generate Cryptographic Bills of Materials (CBOMs) — inventories of cryptographic assets, protocols, and dependencies. CBOMs reveal where weak algorithms are embedded, enabling prioritized migration. Without them, institutions may not even know their risks.

Regulators should launch PQC pilots without waiting for full certification, since real-world testing exposes interoperability and performance issues early and ensures migration is underway before Q-Day. Alongside PQC algorithms, which use mathematics to resist quantum attacks, Quantum Key Distribution (QKD) adds a physics-based layer of protection by making key interception detectable. This defence-in-depth approach is vital for sectors managing sensitive, long-lived data, and organizations can accelerate resilience by partnering with established firms and start-ups offering quantum-safe solutions.

ROADMAPS AND TIMELINES

In finance, regulators should enforce PQC adoption in banks, payment networks, and stock exchanges, with quantum-safe protocols for SWIFT transfers and interbank communications.

In energy and utilities, regulators must require PQC integration into Supervisory Control and Data Acquisition Systems (SCADA) systems and grid controls, with redundancy built into power and water systems to

mitigate disruptions. In healthcare, regulators should ensure PQC for patient data storage and transmission, with hospitals required to maintain quantum-safe backups.

In defence, regulators must accelerate the deployment of quantum-safe communications, satellite encryption, and secure command systems to ensure military readiness. QNu Labs, an Indian start-up in collaboration with the Indian Army and the Department of Science & Technology's National Quantum Mission, has already demonstrated India's first extensive quantum-safe communication backbone through a 500-km quantum key distribution (QKD) network.

TRAINING, A PRIORITY

Regulators should require organizations to educate personnel on quantum risks and quantum-safe practices, ensuring that migration plans are not confined to technical teams but understood across leadership.

Organizations must plan to upgrade data centres, communication systems, and critical infrastructure to withstand quantum attacks. Scenario-based exercises simulating quantum-enabled attacks should be initiated as well, revealing vulnerabilities, testing response protocols, and building resilience.

The quantum threat is real, imminent, and systemic. Migrating to PQC will not only help ward off current threats to data, communications, and infrastructure, but ensure that they remain protected for at least the next 25 years, while safeguarding against the impacts of Q-Day.

Chowdhry is the Co-Founder of HCL, and Singh is the author of *Cyber Storm: Unleashing the Power of Quantum Computing & Artificial Intelligence*. Views expressed are personal.

Canada breaks away, India hedges its bets

The US President's belligerence and erratic policymaking is splintering alliances and redrawing new ones

THE WIDER ANGLE.



PARAG BALAKRISHNAN

Will the US recover from the reign of King Donald? The question remains an open one, but the damage to America's standing abroad is already plain. Across capitals from Ottawa to New Delhi to Brussels, the "Trump Effect" has forced allies and rivals alike to reassess a US that now appears erratic, transactional and coercive.

No country has felt the rupture more keenly than Canada, which Trump has repeatedly mused about making the 51st state. When Canadian Prime Minister Mark Carney spoke at Davos, he tolled the death knell of the old global order.

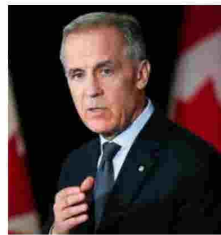
While the post-war system of open trade and shared rules had delivered unprecedented prosperity and stability, it was over, Carney said. In its place was a harsher, more fragmented world in which middle powers like Canada would have to diversify its trading partners and build new coalitions rather than rely on any single superpower. The speech infuriated Trump, who mocked Carney

as "Governor Carney".

The fallout from Trump's belligerence has been significant. Canada has been decisively decoupling from its once closest ally. Canadian travel to the US is down 40 per cent. US alcohol has been stripped from Canadian shelves, prompting bourbon maker Jim Beam to shut its main distillery for a year. Canadian supermarkets now carry labels identifying domestically made products.

Then there is Trump's so-called "Board of Peace", his farcical attempt to sideline the UN and replace it with a personal creation. The countries most enthusiastic about joining have been a clutch of authoritarian and semi-authoritarian regimes. Membership comes with a \$1-billion price tag, which looks less like diplomacy and more like a cash grab. Notably, India has steered well clear of this project.

So where does India fit into this new world order, with the US acting as the class bully, stomping on allies while conspicuously sparing Russia? Ever since the 2020 Galwan clash with China, India has been grappling with how to stand up to an increasingly aggressive Xi Jinping. The uncomfortable truth is that India's strategic options remain narrow. It still needs US backing to counter a hostile China.



MARK CARNEY. Making a point: Carney

One hope was the Quad — the US, India, Australia and Japan — which could provide that ballast. But a recent meeting of the four ambassadors only reinforced suspicions that Trump has little interest in the grouping.

Despite Modi's visit to China, India's Beijing problem has not gone away. While India and China have struck conciliatory tones since, progress has been uneven. Chinese companies remain wary of India, concerned they could find themselves in the crosshairs if tensions flare again.

WHAT NEXT?

One answer lies in deeper engagement with other middle powers, particularly across South-East Asia, from Indonesia and Thailand to Malaysia and the Philippines. Last August, three Indian Navy ships took part in exercises with the Philippine Navy, a country on the front line of maritime confrontations with China. There is also India's new free trade deal with Europe.

Complicating everything is Trump's apparent enthusiasm for dividing the world into spheres of influence. Under this vision, China would dominate Asia, Russia would loom over Europe, and Washington would control the Americas.

For India, the implications are stark. How dependable would US backing really be in the event of another confrontation with China? Relations have already been strained.

Presidents come and go, and Trump will eventually exit the stage. But as Carney warned, the damage to trust is enduring. No country is likely ever again to place the same faith in the US that it did during the eight decades following World War II. A new international order is taking shape, one far more uncertain, fragmented and perilous than the one we knew.

✉ **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.

More reforms needed

The Centre and the States both can't be complacent about growth. When there are sizeable unspent amounts even in flagship government schemes, we can well imagine the serious coordination gaps with States in giving impetus to the inclusive upward growth sentiment.

Reforms can't be an ad hoc exercise. Further our manufacturing has to be cost competitive too for export surpluses as services export model always has lesser permanency. MSMEs need to be given a clear

growth path by stable policy.

Brij B Goyal
Lucknow

Growth imperatives

Appropos the Editorial (January 30), with the robust fundamentals, the Economic Survey has projected an optimistic view of growth. All out efforts must be towards building a current account surplus. Though satisfactory food stocks, comfortable forex reserves, low inflation, manageable NPAs and robust corporate balance sheets will help weather the current

geopolitical storms, volatility in the financial markets, unstable trade tariff scenarios and climate change loom as threats on the horizon. Disinvestment, asset monetization and aggressive investments by private sector must be given the required thrust.

RV Baskaran
Pune

Appropos 'Growth strategy' (January 30), the Editorial brings out the Economic Survey's balanced view quite well: robust near-term growth outlook and solid fundamentals, yet

the medium-term path hinges on turning the current account deficit into a surplus through manufacturing-led exports. The caution against over-reliance on services and volatile capital flows is sensible. What deserves attention now is the push towards manufacturing. Alongside this, sustained investment in human capital — through education, vocational training, and health — remains crucial if we are to replicate East Asian models.

SM Jeeva
Chennai

On businessline.in

Economic Survey 2025-26: Signals and silences

The Survey presents a picture of economic stability but underplays the worries over unemployment and inequality, says **Sankalpa Bhattacharjee**



Amarendra Nandy

<https://tinyurl.com/k68zrt4t>

The Editorial Page

SATURDAY, JANUARY 31, 2026

● WORLDLY WISE

In matters of conscience, the law of the majority has no place.
— Mahatma Gandhi

● WEB EXCLUSIVE
'At the Critical Minerals Ministerial, India should list four priorities.'
— By Shobhankita Reddy
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The Indian EXPRESS
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RAMNATH GOENKA
~ IN 1932 ~

BECAUSE THE TRUTH
INVOLVES US ALL

RTI isn't idle curiosity, it's accountability

THE ECONOMIC Survey has done a commendable job in underlining the country's resilience in an increasingly uncertain world. It has highlighted the deficits that could stall the growth momentum and rightly pointed out that increasing innovation, scaling up the country's manufacturing ecosystem, and enhancing export competitiveness will require the government to become an enabler — not a heavy-handed controller. The Survey, however, is misplaced in interpreting civic scrutiny of governance as antithetical to the entrepreneurial spirit. It calls for a re-examination of the Right to Information Act, particularly the provisions related to the disclosure of deliberations that inform policy making. The observation that such disclosures "unduly constrain governance" is a narrow reading of administrative efficiency. Public access to documents illuminates the evolution of a policy and provides a context for why certain ideas were accepted or rejected. They are a precious tool for citizens to force the bureaucracy to share information concerning public policy and the delivery of services and goods. A transparent bureaucracy is, in turn, fundamental to a stable, predictable, and fair economic environment.

By reducing information asymmetry between citizens and state, the RTI has redefined the relationship between the two. The argumentative ethos fostered by the disclosure provisions has been critical to keeping bureaucrats on their toes. They are not "tools for ideal disclosure," as the Survey notes. The law's roles in exposing major scams — the Vyapam scam and the Adarsh Housing Society scam, for instance — is a testimony to its role as a governance enhancer. The Act has also been used to question the RBI during the banking scams. The financial probity catalysed the Supreme Court's verdicts in the *Girish Mittal* (2021) and *Jayantilal Mistry* (2016) cases, wherein the SC held the Central Bank must disclose names of willful loan defaulters and details of Non-Performing Assets of public sector banks. At the same time, however, the Act's enabling provisions have been substantially attenuated in recent years. The Digital Personal Data Protection Act, which came into force last year, exempts from disclosure "information which relates to personal information," which has no relationship to any public activity or interest. The government has reportedly also tried to evade public scrutiny by claiming it does not have data on migrant workers who died during Covid, paper leaks in competitive exams and on farmers' suicides.

The Economic Survey does acknowledge that the RTI Act is a "powerful tool for reform." The government would do well to go by the Survey's overall governance-centred ethos, and not heed the suggestion to re-examine RTI.

In Uttarakhand, judiciary is guardrail

LAWYERS THAT carry harsh criminal penalties are justified because they protect citizens from harm and ensure that perpetrators are held accountable for the injury they cause. It is precisely because they empower the state to take away the rights to life and liberty enshrined in Article 21 of the Constitution that they must be trusted and deployed with the utmost care and address genuine harm. The Uttarakhand Freedom of Religion Act (UFRA), passed in 2018 by the BJP state government — its penal provisions were made harsher last year — fails to meet these criteria. As an investigation by this newspaper has shown, the alleged instances of "forced conversions" the law sought to address have been few, and in a vast majority of the cases, they did not stand up to judicial scrutiny.

Of the 62 cases registered under the UFRA in the last seven years, the Indian Express obtained the court records of 51. Of these, only five have completed trials, and in all of them, the accused were acquitted. Seven more were dismissed during trial, and in the vast majority of the remaining cases — about 75 per cent — the accused have been granted bail. It is clear from court records that evidentiary standards have often not been met, consensual relationships criminalised, and there are procedural lapses in investigation and prosecution.

The so-called "anti-conversion" law is prima facie a textbook case of using legislative and executive power to chase a chimera conjured for ideological ends. But, as the acquittals, dismissals and grants of bail show, a vigilant judiciary can undo some of the damage, intended or otherwise, of a bad law. The trial courts, Uttarakhand High Court and even the Supreme Court have heard citizens' pleas and granted them bail. While acquitting Vinod Kumar, who was accused of "criticising" Hinduism and praising Christianity to convert people, a trial court in Teri Garhwal observed, "Every person is free to profess, practise and propagate any religion, so long as in doing so they do not infringe upon the civil rights or any legal rights of another person." The courts have lived up to their constitutional mandate and protected citizens from executive excesses. The Uttarakhand legislature and government must now reflect on why the judiciary needed to do so, and what purpose the UFRA truly serves.

For peace of mind, make like an apeman

IN MAN'S evolution, he has created the city/And the motor traffic rumble/But give me half a chance/And I'd be taking off my clothes and living in the jungle," sang the Kinks in 1970. 'Apeman' is a song of its time, and there are things about it that wouldn't go over well today — not least Ray Davies' Caribbean accent. Some things, however, remain just as relevant if not more so, such as the frantic pace of modern urban life. Or indeed, the fear of dying in a nuclear war. The fleeing, unscrupulous wish to escape it all and flee to jungles literal or figurative is a human constant. There's a word for such weak desires, something one vaguely wants but not enough to act on: it's "Velleity". That said, there are always those who do go through with it, who quit the rat race and are happier for it. Perhaps Arit Singh is the best example — at all, a hugely successful urban lifestyle playback singer to focus on making music that's truly his own isn't the same position as an ordinary, burnt-out employee. It may be more a question of boredom, as he has said, and creative freedom. There is, however, a goal that Singh, the "quiet quitters" who were trending a couple of years ago, and the hippies 'Apeman' was arguably satirising, all share: Peace of mind.

It may be an elusive goal in a world that's going to the stress-inducing dogs, but the resolve to get it in the face of pressures, expectations and even one's own professional ego is to be admired. Perhaps it's a trend that will pick up in the coming years, at least among those who can afford it. Because, to return to The Kinks and 'Apeman', "the air pollution is a fogging up my eyes".



V ANANTHA NAGESWARAN,
CHANCHAL C SARKAR
AND MIRA SETHI

INDIA'S MANUFACTURING sector has reached momentum at a time when global production networks are being reconfigured amidst geopolitical uncertainties. Supply chains are diversifying, firms are seeking alternatives to single-country dependence, and industrial policy has returned to the centre of economic strategy worldwide. Against this backdrop, India's manufacturing revival has created a strong foundation for the next phase of industrial growth. As the Economic Survey highlights, sustaining this momentum will depend on strengthening competitiveness and augmenting manufacturing capabilities by integrating into the global value chain.

Over time, India's manufacturing policy has increasingly focused on lowering entry barriers through targeted incentives, infrastructure investment, and improving ease of doing business. These efforts have helped attract investment and strengthen business confidence. The task ahead is to complement existing schemes with stronger ecosystems and move from capacity creation towards deeper capability building.

Countries that command critical technologies, complex manufacturing processes, and trusted production capabilities enjoy greater bargaining power. For India, this implies that the next phase of industrialisation must prioritise strategically important and technology-intensive sectors, while scaling up traditional manufacturing, even if this entails more tolerance for firm-level failures.

ing up traditional manufacturing, even if this entails higher experimentation and more tolerance for firm-level failures.

India's manufacturing profile is beginning to move up the value chain, with gains visible in sectors that combine higher technology content, value addition, and export potential. In electronics, for instance, production has expanded roughly six-fold, and exports have grown nearly eight-fold in the last 11 years. Similarly, India's pharmaceutical industry is among the world's largest by volume, supplying over half of global vaccine demand and a significant share of generic medicines. These sectors combine scale, technology intensity, and tradability. Extending the transition across a broader set of industries will require improved private participation, stronger R&D based innovations, deeper industry-academia linkages, faster absorption of advanced technologies by firms, and more robust skilling systems.

As manufacturing capabilities deepen, the spatial organisation of industry becomes increasingly important. India needs to intensify its approach to industrial clusters, particularly by addressing issues of scale. While clusters remain an important organising principle, many are too small or too fragmented to deliver meaningful productivity and capability gains. The focus should therefore shift from simply creating clusters to enabling larger, deeper, and more integrated industrial ecosystems. The next generation of industrial clusters is likely to be anchored increasingly in Tier 2 and Tier 3 cities. They will offer several advantages, including more affordable land and real estate, lower operating and wage costs, large labour pools, improved infrastructure, and better livability compared to congested metros.

Competitiveness also depends critically on the quality of infrastructure and logistics that connect firms to markets. India has made steady progress on this front. Logistics costs have been declining and were estimated at around 7.97 per cent of GDP in FY 2023-24, broadly comparable with global benchmarks. Port efficiency has improved, with several Indian ports featuring among the top 100 in the World Bank's Container Port Performance Index 2024. Initiatives such as PM Gati Shakti and the National Logistics Policy, combined with an accelerated pace of highway construction, are improving connectivity and coordination across transport modes. There is scope to further reduce logistics costs by rebalancing the freight mix. Road transport continues to carry a dominant share of freight, while rail and coastal shipping — more cost-effective for long-distance and bulk movement — remain underutilised. Greater multimodal integration, with a higher share of freight shifting towards rail and waterways, can unlock the next round of efficiency gains.

The next phase of industrialisation must prioritise strategically important and technology-intensive sectors, while scaling up traditional manufacturing, even if this entails more tolerance for firm-level failures

Quality Control Orders can also play a constructive role in strengthening manufacturing competitiveness, particularly in strategic and safety-critical sectors by progressively aligning with the international standards. By enforcing minimum quality and standards compliance, they can incentivise domestic firms to upgrade capabilities and build credibility in global markets. Their efficacy hinges on careful calibration — phased implementation, adequate testing infrastructure, and close consultation with industry. This would ensure they enhance competitiveness, and not constrain scale or raise input costs.

MSMEs are the backbone of India's manufacturing ecosystem, contributing significantly to employment, output, and exports. However, they face a finance gap. Recent gains in formalisation, im-

proved access to finance, and deeper supply-chain integration have strengthened their role in industrial growth. The next opportunities lie in deeper MSME participation in strategic value chains — as suppliers of components and specialised services — supported by efforts to bridge credit gaps, strengthening skilling, accelerating technology adoption, and expanding quality infrastructure at the ecosystem level.

While regulatory reforms have improved formal ease-of-doing-business conditions, manufacturing firms respond most strongly to speed, predictability, and consistency. Delays in land acquisition, utilities, regulatory approvals, and dispute resolution affect investment decisions and scale outcomes. As manufacturing becomes more spatially concentrated, the role of state and local governments will be decisive. Stable regulatory regimes, functional single-window systems, and time-bound approvals can significantly improve project execution and encourage investments. Ease of doing business, in this sense, is defined less by rankings and more by the daily experience of firms on the factory floor.

India's next manufacturing leap will be defined not just by how much it produces, but by what it produces and how strategically indispensable it becomes. The proposed National Manufacturing Mission offers a platform to align reforms, skilling, infrastructure and innovation under a long-term industrial strategy. While these enablers are essential, the ultimate objective must be deeper technological capability, stronger R&D systems, and globally competitive firms embedded in strategic sectors.

Nageswaran is chief economic adviser, Government of India. Sarkar is economic adviser, Department of Economic Affairs and Sethi is joint director, Department of Economic Affairs. Views are personal

India-EU FTA restores trust in rules-based trade order



HARSH PATI
SINGHANIA

THE CONCLUSION of the India-EU FTA marks a pivotal moment in the trajectory of global commerce. More than a bilateral accord, it is a reaffirmation of the relevance of a rules-based trade order at a time when international trade faces unprecedented strain. Multilateralism is weakened, dispute settlement mechanisms are paralysed, and supply chains are disrupted by geopolitical tensions. The FTA demonstrates that constructive engagement and adherence to international norms remain not only possible but indispensable. It serves as a template for how nations can negotiate complex trade deals while upholding the integrity of the global trading system. It has been described as the "mother of all deals", just as mothers nurture, guide, and set standards for others to follow, this accord is poised to shape the future of trade.

The agreement underscores the capacity of two major economies — together accounting for about 25 per cent of global GDP, one-third of global trade and a combined market of 2 billion people — to reach a consensus while respecting domestic sensitivities. India's agricultural red lines were safeguarded, while the EU maintained its stance on CBAM. The number of tariff lines covered by the FTA is a testament to the complexity of the deal. Bilateral merchandise trade stood at \$136.54 billion in 2024-25, with India exporting \$75.85 billion to the EU. The FTA is expected to unlock \$75 billion in fresh exports, including \$33 billion in labour-intensive sectors. Similarly, the tariff cuts offered by India will save \$4 billion per year in duties on EU products. The FTA is a reminder that trade must be anchored in rules, ensuring stability for businesses, workers, and consumers alike.

Of even greater significance is the harmonisation of standards. Product safety and environmental requirements often determine market access more decisively than tariffs. While the burden of tariffs can be absorbed or passed on, non-compliance with standards can shut out trade completely. By aligning specifications, the FTA ensures that market access is governed by predictability rather than arbitrary barriers. The agreement also helps to diversify trade flows, reducing overdependence on any single corridor and enhancing resilience. It creates a de-risked \$136 billion trade corridor between two reform-oriented economies, linking India's fast-growing \$4.1 trillion market with the EU's integrated \$25.1 trillion economy.

For the International Chamber of Commerce (ICC), this approach resonates deeply. Through initiatives such as the ICC Compact for Trade, Growth and Jobs, we have consistently advocated for agreements that expand opportunity while safeguarding the principles of fairness and sustainability. The FTA embodies this vision: Liberalisation accompanied by safeguards, market access paired with sustainability, and economic integration without compromising sovereignty. The agreement also arrives at a critical juncture for the WTO, ahead of the upcoming 14th Ministerial Conference (MC14) in March. The EU has reiterated that WTO reforms should be based on predictability, fairness and flexibility. With the paralysis of the WTO's Appellate Body undermining the credibility of dispute settlement, the FTA serves as a model for how nations can resolve disputes through rules-based order, they unlock opportunities that benefit businesses, workers, and consumers across continents. The task ahead is clear: Replicate this success, restore the credibility of the WTO, and embed resilience into global supply chains. Only then can trade continue to serve as a driver of growth, stability, and inclusive prosperity.

The writer is first vice chair, International Chamber of Commerce (ICC), Paris, and director, J.K. Organisation

Gandhi's prayer matters more than ever



RAJNI BAKSHI

ON THE morning of January 30, 1948, an American journalist and photographer came to interview Mahatma Gandhi. After the invention of the atomic bomb, isn't nonviolence now irrelevant, Margaret Bourke-White asked him. On the contrary, Gandhi replied, nonviolence is all that is left in the field. Bourke-White challenged Gandhi by asking what he would do if an atom bomb was about to fall on him. Gandhi replied that he would certainly not run towards a bomb shelter — instead, he would go outside, bow and pray for the soul of the planet and its people.

This story tends to irritate some people. One set takes it as proof that Gandhi made nonviolence inaccessible by putting it in extreme terms. For pure materialists, it is ridiculous because they don't know, or cannot access, the realm of prayer. If you are sympathetic to the materialists, the events of January 30, 1948 can be claimed as decisive proof in your favour. Nathuram Godse fired a pistol at point-blank range and Gandhi was killed. What difference did it make, they might say, that in that moment before he fell to the ground, Gandhi said "Hey Ram". The formal memorial of our epochal visionary is inscribed with those words. Our ancestors, who ensured this inscription, were apparently not irritated by Gandhi's answer to Bourke-White. Why does this matter today? The first demand the inscription makes of us is to rise above disputes about "mere Ram" or "tere Ram". Yes, Tulsi-das's "Siyar Ramachandra" has been adopted as a tool of partisan politics. That still does not alter the spirit, the *bhava*, which was on Gandhi's final breath.

The second call of the moment is to recall the depth of the lived experience that Gandhi inspired. This is why millions of people would not have been at all surprised that hours before he was killed, Gandhi made that statement about praying for the pilot. It was the same millions who did not eat that night — for that is what happens in a moment of deeply personal loss. One of the most touching manifestations of this phenomenon was recorded by Vincent Sheean, an American journalist. He travelled on the train that carried Gandhi's ashes to Allahabad for immersion in the *sangam*. That crowds would gather at every station along the way to pay tribute was no surprise. What struck Sheean was that even in the stretches between stations, people were waiting beside the track — with folded hands and prayers.

The easiest and most defeatist thing we can do today is to see these as moments from another time. To succumb to this would be self-destructive. Why not instead keep fragments of some memories even closer to our hearts? For instance, Sheean reported that, as the procession carrying Gandhi's ashes from the station to the *sangam* went by, it passed a church. Waiting out of it were the sounds of Gandhi's favourite hymn, "Lead, Kindly Light". What if, as we are so sufficiently evolved to look up and pray for the pilot, we are, each one of us, capable of seeking to be led by the Kindly Light.

The writer is founder of the YouTube channel 'Ahimsa Conversations'

40 YEARS AGO

January 31, 1986



Indira Gandhi murder case

THE DELHI High Court rejected the plea of Kehar Singh and Balbir Singh, convicts in the Indira Gandhi murder case, to quash the death sentences. Justice R.N. Aggarwal and Justice Malik Sharif-ud-Din agreed in their order in the writ petition that the additional district judge did not conform to the rules of the CrPc while sentencing the convicts to death, but the High Court did not give a ruling on the basis of these omissions.

Akali Dal shelved plan

THE RULING Akali Dal shelved its plan to drive

the militants out of the Golden Temple complex using physical force following a directive from the Centre. The directive came after the first attempt to "liberate" the complex from the followers of the Damdami Taksal and the All-India Sikh Students' Federation on January 19 ended in a fiasco.

Homage to Mahatma

THE MARTYR'S Day, coinciding with the 39th death anniversary of Mahatma Gandhi, was observed. The President, Zail Singh, the Vice President, R Venkataraman, and the Prime Minister, Rajiv Gandhi, visited Rajghat early in the morning to offer floral

tributes at the Mahatma's samadhi.

Fertiliser prices go up

THE GOVERNMENT announced an increase of up to 10 per cent in fertiliser prices with immediate effect. The measure will help to reduce subsidy levels for fertilisers, which are likely to touch Rs 2,000 crore in the current financial year. The exact reduction in subsidy was not officially given. The prices of the principal fertilisers, urea and diammonium phosphate, will go up from Rs 2,150 and Rs 3,350 per metric tonne to Rs 2,350 and Rs 3,600 per metric tonne respectively.

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• **WHAT THE OTHERS SAY**
 Military intervention is not the answer
 — but neither is indifference to the
 suffering of Iranian civilians
 — *The Guardian*

The Ideas Page

SATURDAY, JANUARY 31, 2026

Signing of FTAs is a start. Their success will be judged by gains in global market



SHOUMITRO CHATTERJEE

INDIA HAS recently concluded major trade agreements with the EU, the UK, and Australia, reversing a period of more inward-looking trade policy. The EU and the UK together account for about 30 per cent of global imports of low-skill manufacturing products such as apparel, footwear, and assembled electronics. Free trade agreements with these markets give Indian exporters zero-duty access to a \$3.5 trillion market, creating a strong platform for export growth. How large the gains are will depend on how these agreements are implemented and reinforced in practice.

For years, competitors enjoyed preferential access that India lacked. Bangladesh exported apparel to Europe at zero duty. Vietnam has had an EU FTA since 2020. Indian exporters faced tariffs of 10-12 per cent in apparel and up to 17 per cent in footwear — margins that often decide who wins or loses. That disadvantage is now gone. The government deserves credit for closing this gap.

These agreements also change how global firms view India. By signalling policy stability, they make long-term investment decisions more viable for companies seeking alternatives to China. Manufacturing in India for European markets makes commercial sense. The China-plus-one, Vietnam-plus-one, and Bangladesh-plus-one opportunities have re-opened.

India's export opportunity is large and measurable. The chart compares countries' market shares in Europe in low-skill manufacturing relative to their labour endowments. Bangladesh, Vietnam, and Indonesia export close to their potential, while China is a large outlier. India, by contrast, exports about 18 percentage points less than its potential — equivalent to roughly \$160 billion in annual export headroom. Signing an FTA is an important step, but market access must be matched by domestic readiness. Converting these agreements into sustained export gains will require action on four fronts that sit outside the FTA text.

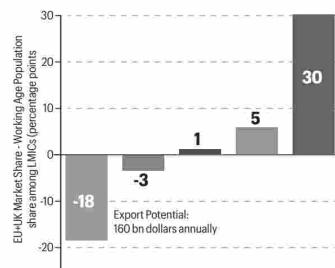
The first challenge is standards. As the latest World Development Report makes clear,



ILLUSTRATION: C/S SAKSHI KUMAR

product-safety and environmental requirements — not tariffs — now shape which goods can reach global markets. Non-tariff measures affect 90 per cent of world trade today, up from 15 per cent in the late 1990s. Compliance costs are high, especially for firms in developing countries. The larger problem, however, is that non-compliance by even one exporter can damage an entire industry's reputation. India has experienced this repeatedly. Failures by individual pharma firms, shrimp processors, or agricultural exporters have led to inspections, bans, and delays that hurt compliant firms as well. One bad shipment can shut a market. Industry associations must play a stronger role in self-regulation. Government can support compliance through testing infrastructure and technical assistance. But it is better for a shipment to be rejected in Mumbai than in Rotterdam.

The second challenge is complexity. India's trade regime remains unnecessarily complicated. Complexity raises compliance costs and creates scope for discretion. Consider the UK FTA. The UK schedule has three categories: Zero duty, excluded, or quota-based access. India's has more than 20. The MFN tariff schedule is full of exceptions and conditionalities. It includes more than 140



unique ad valorem rates and many specific tariffs. This complexity invites disputes. Volkswagen was recently asked to pay \$1.4 billion for importing auto parts in separate consignments taxed at \$15 per cent rather than as a single shipment taxed at over 30 per cent. From the firm's perspective, this reflected tariff design. From the authorities' perspective, it was evasion. Either way, complexity damages credibility. India learned this lesson with GST, where rate rationalisation came only after years of friction. The same logic applies to tariffs.

The EU FTA risks repeating this pattern. Wine tariffs have been cut from 150 per cent to as low as 20 per cent — but only if the wine is priced above 2.5 euros. Customs officials are now expected to verify prices at the border. Firms will respond by invoking the cut-off and adjusting prices later. Enforcement will come years down the line,

through audits and penalties. This is how red tape is created. Simplicity is not cosmetic; it is central to export competitiveness.

Third, FTAs open export markets but do not ensure access to the best inputs and machines. That depends on the MFN tariff regime. Many capital goods and process machines in the UK agreement reach zero duty only after long phase-outs. Some of the best equip-

ment comes from countries with which India has no agreement. As the Economic Survey has recognised, protection risks raising economy-wide costs, dampening competitiveness, slowing upgrading, and weakening export potential. FTAs thus cannot substitute for low, uniform tariffs across the board. Support to critical industries should instead rely on other instruments, preferably subsidies, rather than tariffs.

Fourth, India has a record of undermining its own trade agreements after signing them. Phased commitments create time for domestic lobbies to seek protection through other instruments. New research by economists Abhishek Anand and Naveen Thomas documents how anti-dumping duties and quality-control orders restricted handmade fiber imports from Indonesia despite an FTA. The short-term aim was to protect domestic producers. The result was higher input costs and weaker garment exports.

Some of these QCOs, especially on man-made fibers, are now gone. But the mindset that produced them needs to change. Protecting upstream producers often harms downstream exporters. Erratic regulatory orders weaken India's credibility as a trade partner. Commitments matter only if they are sustained.

To be sure, the government has handled some negotiations well, including with the US, where talks have continued through back channels despite public pressures and temptation to abandon them. One hopes for a positive outcome soon. Several domestic reforms are moving in the right direction — simplifying labour codes, rationalising GST rates, expanding solar infrastructure, and setting up a deregulation commission to name a few. But one constraint looms large: High input costs, chiefly power and credit. As the Economic Survey points out, "For export disciplines to work in India's favour, competitiveness must be achievable and affordable."

The success of India's FTAs will not be judged by signing ceremonies but by a single metric: Gains in global market share. The opportunity is large. Delivering on it requires credibility with global firms and trading partners — built on standards compliance, simpler regulation, access to competitive inputs, and sustained commitments after agreements are signed.

The writer is assistant professor at Johns Hopkins University

In his last days, a dilemma the Mahatma couldn't resolve



RAM MADHAV

ON JANUARY 30, 1948, Nathuram Godse killed M K Gandhi for crimes that he believed the latter was responsible for. He accused Gandhi of acting "very treacherously to the nation by consenting to the partitioning of it". Had Gandhi opposed Pakistan sincerely, neither M A Jinnah nor the British could have created it, he argued.

That Godse was wrong in killing Gandhi goes without saying. But was Godse also wrong in his reasons for killing Gandhi? Gandhi took inspiration from two prominent figures — Buddha and Jesus — for his principle of peace. Interestingly, all three met with unnatural deaths. While Buddha accepted death by consuming contaminated food because he didn't want to offend his host Cunda, Jesus accepted death because the rulers failed to understand him. In Gandhi's case, the reason appears to be both. Gandhi never wanted India to be partitioned. But in June 1947, he stood in defence of his colleagues who accepted it, as a fait accompli.

Gandhi tried to convince Jinnah to give up the demand for Partition in 1945, but failed. When the Cabinet Mission arrived in 1946 with the proposal to divide the country into three parts on purely communal lines, Gandhi again conveyed his opposition to the Congress Working Committee. But the Congress leadership — that included Jawaharlal Nehru, Sardar Patel and Maulana Azad — had made up its mind to accept the Plan because it came with the first-ever offer of transfer of power to them. Dejected, Gandhi left the meetings saying, "I admit defeat. I shall now leave with your permission. You should follow the dictates of your reason." On earlier occasions, when Gandhi said something like that, the leaders would have urged him to stay, with the promise that they would follow his instinct. But not that day. Pyarelal gives a graphic account: "What do you desire? Is there any need to detain Bapu any further? The Maulana Saheb asked. Everybody was silent. In that hour of decision, they had no use for Bapu. They decided to drop the pilot."

Gandhi was agast when he came to know about Viceroy Mountbatten's proposal in March 1947, with a definite indication of Partition. He hoped that the Congress would reject it after consulting with him. It did not. In the CWC meeting in the first week of March 1947, Congress demanded the partition of Punjab on communal lines. Later, at a press conference at Madras, J B Kiplani indicated that the same principle could be applied to Bengal.

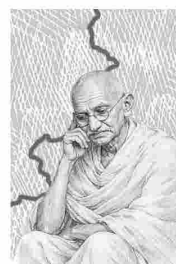
Agitated by the news of Congress recommending the partition of Punjab, Gandhi wrote letters of protest to both Nehru and Patel. A terse reply came on March 24. "It was adopted after deepest deliberation. Nothing has been done in a hurry without our full thought", it said, adding, "It is difficult to explain to you", "Such a thing would have been inconceivable in old days", rued Pyarelal.

Gandhi rushed to Delhi, and, in a desperate final attempt to prevent Partition, met Mountbatten on March 31. He proposed that power over all of India could be transferred to Jinnah. Nehru and Patel were strongly opposed to this, while Jinnah dismissed it as "one of those wily tricks of Gandhi". The new proposal for partition was presented by Mountbatten before the Indian leaders Nehru, Patel and Acharya Kripalani from Congress, Jinnah, Liaquat Ali Khan and A K Nisar from the League, and Sardar Baldev Singh. On June 2, 1947, Once those leaders agreed, Mountbatten immediately called a press conference to announce the Partition plan, known as the "June 3rd Plan".

Gandhi faced the same dilemma that Buddha faced several millennia ago. Unable to publicly disown the decision of his junior colleagues, although he was opposed to it, he blamed the "circumstances". "Sometimes, certain decisions, however unpalatable they might be, had to be taken. Out of evil, sometimes good came out", he contended before the agitated Congress leaders in June 1947.

Gandhi cannot be completely absolved of his role in creating "circumstances" that led to the Partition. But could he be singularly held responsible? Godse thought so, but the country did not. Indian politics, "in the absence of Gandhiji", would surely be better, Godse opined. He was proved wrong. India became a vibrant polity, but not in Gandhi's absence but through his eternal presence.

The writer, president, India Foundation, is with the BJP



LETTERS TO THE EDITOR

Economic Survey

WHILE MACROECONOMIC indicators may suggest economic expansion and moderating inflation, a disturbing contradiction persists in the steady erosion of the Indian rupee against the US dollar (Eco Survey flags the key problems, solutions await, IE, January 30). This persistent depreciation undermines the very foundations of economic progress, regardless of optimistic growth narratives. It is imperative that planners, economists and policymakers urgently deliberate on reversing this trend and securing a resilient rupee insulated from market volatility.

Jiji Panicker K, Alappuzha

IF FOREIGN investors are hesitant to invest into India due to complex tax rules and regulatory hurdles then GoI will have to seriously look into it (Eco Survey flags the key problems, solutions await, IE, January 30). High capital cost and lack of optimum utilization of current facilities is forcing private sector hands to invest into capex or greenfield projects. Cutting red tape at all levels and fast tracking legal reforms and faster resolution for disputes will help the economy.

Bal Govind, Noida

Commendable step

THE NEW regulations, stayed by the Supreme Court for the moment, mark a decisive and progressive shift by formally acknowledging caste-based and social discrimination within universities (UGC regulations force a needed reckoning, IE, January 29). By replacing outdated frameworks with stronger grievance redressal mechanisms, the UGC has taken a commendable step towards creating safer and more inclusive academic spaces. The inclusion of OBCs under the equity framework reflects an expanded understanding of social justice and aligns with constitutional values of equality and dignity.

Gaganpreet Singh, Chandigarh

NIKIT ABHYANKAR
AND SAMIR SARAN

FOR DECADES, India's power sector grappled with scarcity and affordability issues even as it undertook complex and ambitious power-sector reforms. Today, we add 40 GW of renewable capacity every year, far more than in most developed economies and cheaper than in most geographies. The task is to organise markets, institutions, and demand. Absorption is becoming a constraint with nearly 42 GW of renewable capacity awarded through auctions yet to find buyer utilities. Distribution companies are cautious about additional clean energy commitments. To sustain clean-energy momentum, the pool of buyers must expand. Two structural shifts make this possible.

The first is the fall in clean-energy prices. Recent reverse auctions have closed at around Rs 3 per unit for solar power paired with storage — with prices remaining flat in nominal terms for 12 to 25 years.

These projects can deliver near round-the-clock supply at the same prices. The second factor is a product of institutional reform. Open access and captive procurement allow large industrial and commercial consumers to buy power from anywhere in the country by paying network charges. Roughly a quarter of India's renewable capacity addition is now driven by this.

India's cheapest power needs new buyers

Manufacturing clusters, export-oriented industries, and data centres can procure clean electricity through open access or captive routes, gaining long-term cost certainty while absorbing large volumes of new capacity

This transition will allow utilities to evolve into strong grid and reliability platforms while new demand absorbs low-cost clean power. Where will new demand come from?

First, manufacturing clusters, export-oriented industries, and data centres can procure clean electricity through open access or captive routes, gaining long-term cost certainty while absorbing large volumes of new capacity. Such clusters, offering Indian exports an edge under carbon border measures such as the EU's CBAM, could unlock FDI and green finance, accelerating industrial growth and clean-power deployment. Second, nearly half of India's industrial energy demand is to process heat, with a large portion supplied by imported oil and gas. Electric heat pumps and high-temperature heat batteries allow this demand to shift towards clean electricity.

Third, fertiliser and steel are important sectors, yet depend on imported gas and coking coal. Recent green ammonia auctions reveal fertiliser production using clean electricity is competitive. With continued cost declines, green steel could follow a similar path. Fourth, electrifying buses, commercial fleets, and freight corridors can create a large and flexible demand source for domestic clean power. When charging is aligned with daytime solar

output, electricity demand rises when clean power is most abundant. Fifth, distributed rooftop solar across commercial buildings, MSMEs, and homes lowers bills and improves resilience. For utilities, it reduces peak demand, losses, and subsidy burdens.

Large buyers could transition faster if long-term clean-energy contracts were aggregated and securitised through dedicated finance platforms. Smaller consumers will need India Stack-connected fintech products to reduce transaction friction. Expanding demand for clean electricity is also the most effective way to absorb India's excess solar panel manufacturing capacity. One concern is that key components, particularly batteries, are often imported. India has shown through solar manufacturing that such dependencies can be reduced with scale and policy certainty. Batteries can follow a similar trajectory, supported through partnerships with allied economies to secure critical minerals.

Robust domestic demand has always been the Indian economy's greatest strength. It can now also work for its energy transition. India's cheapest power has arrived. Building the markets, institutions, and end-use pathways will define the journey to Viksit Bharat.

Abhyankar is co-faculty director of the India Energy and Climate Centre at University of California, Berkeley. Saran is president, ORF



SUNANDA MEHTA

THE SYMBOL of the National Congress Party, the clock — is frozen at 10.10 am. But on January 28, it was at 5.44 am that time stood still for Baramati.

The stillness was palpable in the town known as the home turf of the Pawars, as it absorbed the news that Ajit Pawar was no more. People downed the shutters on their shops, locked homes and started to move towards the airport, the hospital and finally the grounds of the Vidya Pratishthan where his mortal remains would be brought for a final glimpse.

Despite decades as a journalist, I have

written about Ajit Pawar only a few times — with the story almost always being far from flattering. This got reinforced when I spent two days in Baramati during the 2024 Lok Sabha elections campaign. Ajit Pawar's wife Sunetra faced the incumbent MP, his cousin Supriya Sule. Political analysts predicted a win for Sunetra, given Ajit Pawar's hold over Baramati and the redoubtable sugar mulls of Maharashtra. Yet, speaking to the residents, I found an unmistakable undercurrent of support for Saheb, Sharad Pawar, who was still seen as the real architect of Baramati. For them, Dada, Aji Pawar, was only carrying forward the work of his mentor. Many also expressed unhappiness at the split that they felt he had manoeuvred in the party and the family. Sule did end up winning, and

by a comfortable margin.

The Baramati I visited on January 28 was a vastly changed one. And it was not just because of the tragedy. The grief here did not seem to stem from a short-term feeling of loss. It seemed to have hit home. In the grounds of the Vidya Pratishthan, the women's support for the man who had instituted the Laddi Bahin scheme was apparent — and touching. Thousands sat silently and patiently on the steps, just out-

From the upstairs that Ajit Pawar had been labelled as not so long ago, he had finally become the mentor he always aspired to be

side the periphery of the stage, stony-faced, teary-eyed, deeply moved.

On the stage, VIPs and politicians, usually eager to give bites to the media, responded to their requests with folded hands. A few who did speak choked up midway and trailed off. And then there was the sight of the first family of Baramati. As Supriya Sule strode on to the stage, one arm around Sunetra Pawar, the other stretched out to shield her from the crowds, years of family differences seemed to melt away.

The next day as the crowd swelled from thousands to lakhs at the funeral, one needed little proof to deduce that the winds had quietly but certainly changed at Baramati. From the upstairs that Ajit Pawar had been labelled as not so long

ago, he had finally become the mentor he always aspired to be.

Looking back, the decisive sweep of his party in the municipal council elections in December 2025 had given that indication. While the union NCP was trounced in the corporation elections in January, the coming together was a small win in its own right. Soon after, the two parties announced a joint battle for the Zilla Parishad elections — and this time under the combined symbol of the clock, a contentious issue between the two parties since the split. It seemed time was finally on Aji Pawar's side, until it tragically wasn't.

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In Baramati, a long goodbye — and winds of change

● LAW

What's in a name? In the Beckham family feud, it's a trademark

Amal Sheik
New Delhi, January 30

BROOKLYN BECKHAM did not set out to spark a discussion on how trademarks work. As adult children of famous parents increasingly do, he simply posted on Instagram to say that things were not great at home. But buried in the family drama was a claim that made lawyers sit up — that his parents had pressured him to sign away the rights to his own name.

Brooklyn, 26, is the son of the iconic footballer David Beckham and pop star-turned-fashion designer Victoria Beckham. He claimed that his parents had "pressured and attempted to bribe" him into signing away the rights to his name before his 2022 wedding. He added that resisting that pressure "affected the payday" and how he was treated thereafter.

Business of names

Public records from the UK Intellectual Property Office show that the trademark "BROOKLYN BECKHAM" was registered a decade ago, with Victoria Beckham as the proprietor. The registration covers a range of domains, including clothing, cosmetics, and entertainment.

This is not unusual in celebrity families. Registering a child's name early keeps outsiders from monetising it and allows parents or managers to shape commercial use.

One popular assumption is that once a child becomes an adult, ownership of their name reverts to them, but that is not the case. Brooklyn's complaint is not that the trademark should never have existed, but about being pressured, as an adult, to formally give up or limit rights connected to his name. What exactly was put in front of him is not public, as most celebrity branding arrangements live inside private contracts.

Right to use a name
Under UK law, trademark owners have exclusive rights, and those using the trademark commercially without consent can face infringement claims. A limited defence allows people to use their own names for business, but it applies only if the name is honest and does not confuse consumers or trade by relying on an existing brand's reputation.

In families where a surname already anchors a sprawling commercial universe, with endorsements and media ventures, defining "honest use" can be difficult. For decades, the Beckhams have built a tightly managed commercial ecosystem. Brooklyn's public break disrupts that pattern. His posts suggest a tension familiar in celebrity families — where personal boundaries collide with commercial ones. He has tried, with varying success, to establish an independent identity through photography, food ventures and fashion. The irony, that distance is hardest to achieve when your name is already doing so much work for you, and without you.

What courts consider
If such disputes reach courts, judges consider trademark registrations, contracts, licences, evidence of commercial use. Past cases involving relatives with shared surnames have hinged on consumer confusion and ownership records, not on who feels wronged. Generally, such conflicts never reach that stage. Renegotiations, coexistence agreements or limited licences are far more common methods of resolution, since litigation risks damaging not just relationships but the very brand everyone is angling over.

BECKXIT TIMING
● The "BROOKLYN BECKHAM" (above) trademark is due for renewal later this year.
● Renewal would preserve existing ownership, and letting it lapse would reopen questions of control in a very public way.
● For now, the Beckhams dispute sits in an awkward space between family disagreement and brand management.

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Right to use a name
Under UK law, trademark owners have exclusive rights, and those using the trademark commercially without consent can face infringement claims. A limited defence allows people to use their own names for business, but it applies only if the name is honest and does not confuse consumers or trade by relying on an existing brand's reputation.

In families where a surname already anchors a sprawling commercial universe, with endorsements and media ventures, defining "honest use" can be difficult. For decades, the Beckhams have built a tightly managed commercial ecosystem. Brooklyn's public break disrupts that pattern. His posts suggest a tension familiar in celebrity families — where personal boundaries collide with commercial ones. He has tried, with varying success, to establish an independent identity through photography, food ventures and fashion. The irony, that distance is hardest to achieve when your name is already doing so much work for you, and without you.

What courts consider
If such disputes reach courts, judges consider trademark registrations, contracts, licences, evidence of commercial use. Past cases involving relatives with shared surnames have hinged on consumer confusion and ownership records, not on who feels wronged. Generally, such conflicts never reach that stage. Renegotiations, coexistence agreements or limited licences are far more common methods of resolution, since litigation risks damaging not just relationships but the very brand everyone is angling over.

BECKXIT TIMING
● The "BROOKLYN BECKHAM" (above) trademark is due for renewal later this year.
● Renewal would preserve existing ownership, and letting it lapse would reopen questions of control in a very public way.
● For now, the Beckhams dispute sits in an awkward space between family disagreement and brand management.

Public records from the UK Intellectual Property Office show that the trademark "BROOKLYN BECKHAM" was registered a decade ago, with Victoria Beckham as the proprietor. The registration covers a range of domains, including clothing, cosmetics, and entertainment.

This is not unusual in celebrity families. Registering a child's name early keeps outsiders from monetising it and allows parents or managers to shape commercial use.

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● ECONOMY

Budget 2026: The 3 big macro worries for India



UDIT MISRA

ON SUNDAY, Finance Minister Nirmala Sitharaman will present the Budget for the next financial year that spans from April 2026 to March 2027.

A Budget has limited space — both monetary and policy — to fundamentally alter things. For one, while all past Budgets were annual financial statements, in each of them, the government has a lot of committed expenditures. For instance, salaries of its employees cannot be changed from one year to another, nor can the tax rates be tweaked every year. Moreover, often what the FM can and cannot do or what she should or should not do is affected by the state of the government finances in the year that is ending — that is, the current financial year, which started in April last year and will end in March 2026.

For instance, if in the current financial year, a section of the Indian economy is affected — for instance, Indian exports after the steep US tariffs — it may set the stage for the FM to address that issue in the next Budget. So, often enough, looking back at the year gone by can provide good clues as to the main concerns that the FM may attempt to address in the next year's Budget.

What does the data from the current year tell us?

There are many issues one can point to, but at the macroeconomic level, there are three main concerns:

1. WEAK GDP GROWTH
This may sound odd since all stories about India's economic growth (measured by Gross Domestic Product or GDP) have been resoundingly upbeat. However, most agree that present India is the fastest growing major economy are talking about "real" GDP growth. When it comes to the making of the Union Budget, what matters more is "nominal" GDP and its growth rate.

To be sure, what we count first is the nominal GDP — that is, the total value of all goods and services in today's prices. To arrive at "real" GDP, we take away the effect of inflation so that we get to know how we "really" grew — how many more apples, trucks and shirts we produced this year as against the last.

There is a reason nominal GDP matters more. It is the observed value and forms the starting point for all Budget calculations. For instance, if a government wants to know how much it will earn in tax revenues in the next financial year, it has to know the size of the nominal GDP before it can apply a tax rate and arrive at its tax revenues.

If the nominal GDP doesn't grow as fast as the government anticipated, it can upset all its calculations. Here's how.

Suppose the government assumes that the nominal GDP of India will grow by Rs 100, and as a result, with a tax rate 15%, it will get an additional Rs 15 in the coming year to spend. But if, for some reason, the nominal GDP grows only by Rs 50, then the total additional money in the government's hands will be Rs 7.50.

That will either force the government to borrow an additional Rs 7.50 from the market — which, in turn, would mean less funds for you to borrow for buying your car or home, and as a result, lead to higher interest rates for everyone in the economy. Or, if the government chooses not to borrow more, it will have to cut its expenditure; this cut could be in the shape of lower R&D funding in India's defence or lower subsidies for the poor.

The point is, when it comes to the making of the Budget, it is the nominal GDP and its growth rate — not the real GDP growth rate — that is typically heard about — that matters. India's nominal GDP growth rate has been decelerating for years. Chart 1 shows

country should be achieving under normal circumstances: A higher pace comes with the risk of inflation, and a slower pace with the potential rate implies that the country is not fully utilising its resources.

It follows that to raise a country's GDP growth rate, issues like the manner the government must attempt to raise the potential growth rate. The potential growth rate depends on three main factors (see table).

● **One**, the capital stock in the economy. This refers to all the physical assets in the country — roads, bridges and machinery, etc. — that can generate growth.

● **Two**, the labour input. This refers not just to the number of people but also their capacity, their skills.

● **Three**, total factor productivity (TFP). This refers to the efficiency with which labour and capital are used in an economy.

The RBI's research shows that India's potential growth rate had been falling over the years. In the 2003-2008 phase, which was India's highest growth period ever, the

country should be achieving under normal circumstances: A higher pace comes with the risk of inflation, and a slower pace with the potential rate implies that the country is not fully utilising its resources.

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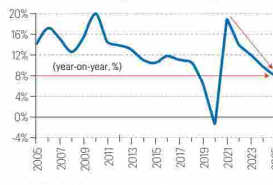
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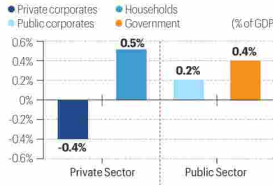
● CONCERNING SIGNALS

Chart 1: Decelerating nominal GDP growth rate



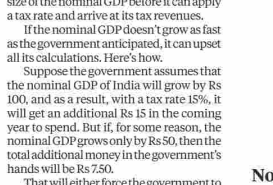
SOURCE: CENTRE FOR MONITORING INDIAN ECONOMY

Chart 2: Underwhelming tax collections



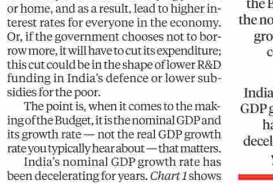
SOURCE: CEC, HSB

Chart 3: Gross capital formation, clear laggard



SOURCE: CEC, HSB

Chart 4: Declining capital inflows



SOURCE: CEC, BLOMBERG, HSB

Ahead of the Budget presentation on Sunday, a look at the key issues facing India: Nominal GDP growth, tax collections & private investment

Something similar is happening to government finances in the current financial year. As chart 2 shows, none of the tax collections are keeping pace with the rate at which the government assumed at the start of the year. The black bars are the rate at which the government had assumed a particular tax collection would grow, and the red bars alongside show the rate at which they have actually grown year-to-date (YTD).

There is one more detail in chart 2, sourced from a recent research report by HSB's Chief India Economist, Pranjal Bhandari. The growth rate of gross tax revenues of the government is far below even the weak nominal GDP growth rate (shown as a red line at 8% level). What this means is that tax buoyancy is going for a toss. As against an assumed tax buoyancy of 1.1 at the start of the financial year — that is to say that if nominal GDP grows by 1%, then tax revenues will grow by 1.1% — the actual tax buoyancy is half that rate (0.6).

3. WEAK VPT CORPORATE INVESTMENTS
If there is one consistent policy goal of the incumbent government, then it is to boost the private sector's involvement in the economy. It follows from PM Modi's view of "minimum government" where the role of the government should be curtailed and efforts should be made to incentivise the private sector to take the primary role of producing goods and services and, in the process, creating jobs and prosperity.

This policy push has been particularly clear since 2019, when FM Sitharaman introduced a sharp cut in corporate tax rates to incentivise private firms to increase their investments in the economy. This was backed up by a historic increase in the government's capital expenditure — that is, spending targeted towards building physical infrastructure like roads, bridges and ports. The idea was to bring down the costs of doing business for the private sector. This was followed by direct subsidies to private firms in the form of the PLI scheme.

When none of this worked as expected, the government started cutting the tax burden on consumers — first by repeatedly raising income tax exemption levels and later by cutting the GST rates — to incentivise demand and create a business case for the private sector to invest in the economy.

Despite these changes and the high growth rates of the economy, data (chart 4) shows that private corporate investment has fallen from the pre-pandemic period (2019). Indian firms are just not selling enough to perhaps make a case for widespread fresh investments. Read the latest GDP column to know more.

What is also worrying is that over the past year or so, global investors have started shunning India (chart 4). This has hit the rupee's exchange rate, and created an economic and a political headache for the FM.

Nominal GDP
When it comes to the Budget, it's the nominal GDP growth that counts.

India's nominal GDP growth rate has been decelerating for years.

In the current year, the nominal GDP is expected to grow by just 8%, but as can be seen from the chart, this level is quite low when one compares it with the record of the past 20 years; it is witnessing a secular deceleration in the recent past.

Last February, the FM expected India's nominal GDP to grow by 10.1%. This was already lower than the past levels. Now, the First Advance Estimates released by the Ministry of Statistics peg the nominal GDP growth at 8%. The first main concern for the FM, then, would be to figure out a strategy to boost the nominal GDP in the coming financial year.

2. WEAK TAX BUOYANCY
In the example above, where at a 15% tax rate, the government expected an additional Rs 15, the assumed tax buoyancy is 1. A tax buoyancy of 1 would mean that if the GDP goes up by 10%, then the tax collections also go up by 10%. But what if this assumption does not come through? What if, apart from nominal GDP going up by only Rs 50 and not Rs 100, the tax buoyancy was also not 1 but 0.5? In such a scenario, the total additional tax revenues with the government will be only Rs 3.75. That is a sharp drop from the original estimate of Rs 15.

Growth revival
● RBI research shows India's potential growth rate was falling for years. The Survey, however, sees green shoots

potential growth rate was 8%. Between 2009 and 2015, it fell to 7%. By 2023, even the CEA acknowledged that around the time the Covid-19 pandemic hit India, the potential growth rate had fallen to 6.5%.

In the latest survey, however, the CEA notes that "cumulative impact of policy reforms", specifically over the last three years, "appears to have lifted the economy's medium-term growth potential closer to 7 per cent". These include manufacturing-

oriented initiatives — such as the Production-Linked Incentive (PLI) schemes, FDI liberalisation, and logistics reforms — that have helped boost India's ability to produce more (read supply).

On the labour front, the survey finds that "labour force consolidation, reduced regulatory compliance and state-level regulatory reforms have begun to lower frictions in the labour market. At the same time, sustained investments in education, skilling and the apprenticeship ecosystem are strengthening workforce quality and employability."

The survey points out that international experience shows that such "step-ups in potential growth are most credible when reforms are persistent rather than episodic, and when macroeconomic stability is maintained." While domestically, "India fulfils both these conditions", the survey does end with the caveat that geopolitical conflicts and their ill-effects on India's back from achieving its potential.

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In chess, a black and white story
Chess, too, has a similar story — also about data, and a strip search.

At the centre of chess's greatest ever black vs white battle — the Hans Niemann-Magnus Carlsen face-off — was technology, unfair advantage and intrigue. The little-known Niemann's victory over chess GOAT Carlsen sparked allegations about the rookie's use of chess engines in deciding his moves.

The use of engines in online chess has been rampant, on-board games also have cheats. "If they want me to strip fully naked, I will do it," said Niemann.

Other sports
Football and basketball don't totally rely on humans to search talent or for draft day picks. Every minute player detail — from skills, jump heights, stamina to even tem-

perament — are fed into a computer. The ratings help decide if the team wants to bet on the unproven, but not untested, newcomer.

Cricket dressing rooms, too, have people with bar charts and graphs. India was late to the game. Once, on a tour to South Africa, opener Virender Sehwag faced an unusual field position in the first over — a catching third man close to the fence. The numbers showed that Sehwag would score the most runs to third man in the early part of his innings. Many times, these were mistimed hits that flew over the inner circle. In the very first over, Sehwag was caught at short third man. It was a victory for those with data.

Data might not be strictly steroids. But in an increasingly cerebral sport like tennis, data insights lead humans' mightiest muscle — the brain — an advantage over those with no access to this tech. High on all those fancy metrics, the Haves won't quite comprehend what the Have-nots are missing. The Australian Open wouldn't have taken the call lightly.

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● SPORT

Data may not be the new steroids, but Aus Open organisers see a line being crossed

Sandeep Dwivedi
New Delhi, January 30

IS DATA the new steroids? Do number-crunching gadgets give athletes unfair advantage on court? Maybe they do.

At least, that's what the Australian Open organisers would have thought when they asked the world's top two men's tennis players, Carlos Alcaraz and Jannik Sinner, to take off the AI-powered fitness monitor under their wrist-bands. The top women's player, Aryna Sabalenka, too, was asked to do the same. That's how the ultra-advanced version of their daily 10,000-step counter came under scrutiny, spotlighting the role of data as a "performance-enhancer" in sports.

Fitness freaks and data geeks

Tennis isn't alone when it comes to fitness tracking. It's actually late to the data binge. Football, baseball, basketball and even cricket have long got number-crunchers to help pick players, frame tactics and decide team composition. The jocks

were finally taking the nerds seriously. It was this mindset change that saw elite athletes embrace wearable technology, programmed to give them workload data that helps in anticipating injuries and recovery.

The makers of the devices that the players wore at the Australian Open, WHOOP, were bending no rules. Nor were the stars being sneaky. The gadget they wore during the game was approved by the ATP and the WTA. Only the Australian Open organisers hadn't yet shown the green light.

They had their reasons. "Some wearables provide athletes with an indication of internal load (measures like heart rate), which can give them a 360-degree view of the work they're doing and how their bodies respond," Tennis Australia said in a statement.

Generally, sports authorities have been fine with a player's external load being tracked — such as the distance they cover and the acceleration of their motion. As for the real-time internal load — such as heart rate — there wasn't a consensus, at least at

the Australian Open.

The device that Alcaraz and others had on their wrist wasn't connected with the world outside, but there are similar gadgets in the market that are designed to provide real-time data analysis with text, voice and even video. What if this on-court data of players reached the coaches' corner? Wouldn't they have an unfair advantage?

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Tennis stars Aryna Sabalenka, Carlos Alcaraz and Jannik Sinner were all asked to remove their fitness trackers at the Australian Open.

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In a social media post, the company's chief Will Ahmed said: "Ridiculous. Whoop is approved by the International Tennis Federation for in-match wear and poses no safety risk. Let the athletes measure their bodies. Data is not steroids."

Within days, Ahmed posted a video announcement. "We are overhauling our Whoop Body collection to all the tennis

players at the Australian Open. The sensor can be worn discreetly and effectively in your new undergarments. It's going to take a strip search to keep 'whoop off the court!'"

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DECCAN HERALD

ESTABLISHED 1948

Water stress signals a looming breakdown

In a new report by United Nations researchers, there is a warning for the world—that it is entering an age of water bankruptcy, where a deepened crisis escalates to a breakdown with no assured paths to recovery. The report, published ahead of the fourth UN Water Conference to be held this year in the United Arab Emirates, says the world is now living beyond its hydrological means in the post-crisis era. It notes that many rivers, aquifers, and wetlands have crossed thresholds beyond which recovery to historical "normal" conditions is unlikely. Analysing global data, it says that what once appeared as temporary droughts, shortages, or pollution shocks have become chronic features. The time for warnings is over; it is now the time for the consequences of not heeding those warnings.

According to the report, these conditions have arisen because water consumption has exceeded nature's ability to replenish the resources; climate change has accelerated the degradation. Nearly half the global population experiences severe water scarcity for at least one month a year. The deficit causes reservoirs to go dry, cities to sink, water to be rationed, crops to fail, and wildfires and dust storms to rise and spread. Iran and Afghanistan are among the worst-affected countries. Tehran is going through a once-in-a-century drought, and prayers for rain are being held across Iran. There has even been a warning, considered extreme, that Tehran may have to be evacuated and residents moved to the south of the country. The crisis is not limited to countries of the Global South. Regions in Europe and the United States are also witnessing a severe crunch.

Water shortage is triggering conflict within and between countries, in line with the predictions for water wars. These frictions will have unpredictable political consequences. The UN report says the situation may still be salvaged if the seriousness of its contents is appreciated and timely steps for mitigation and adaptation are taken. Solutions may vary from place to place because the intensity and fallout are different. India is among the countries that will be most hit because of a shortage of water for drinking, agriculture, and other purposes. The shortage has severely impacted agricultural production in some parts of the country. This is a crisis of life that calls for collective, informed responses. Responsible consumption, scientific conservation and recycling, and the adoption of technology still offer a potent strategy. Results will hinge, as always, on how well this bankruptcy is understood and how proactive the approaches can get.

A fast lane for the entitled

The Karnataka legislature has, once again, demonstrated an ability to elevate a personal inconvenience into a matter of grave public importance. While potholes claim lives, public transport crumbles, and classrooms leak, the House found time to passionately debate the trauma of elected representatives being stopped at toll plazas. The trigger came from Congress legislator S N Subbareddy, who complained that MLAs and MLCs were being "harassed" at toll plazas despite being legally exempt from paying toll charges. The exemption itself is not in dispute. Rule 11 of the National Highways Fee (Determination of Rates and Collection) Rules, 2008, grants state legislators toll-free passage within their own states upon production of a valid identity card. But the leaders would like to believe that this statutory compliance is an act of malice.

Legislators are entitled to 'exempted Fastags', which are recognised by toll plaza readers, allowing vehicles to pass seamlessly without any fee being charged. If the Fastag is inactive or the toll staff suspect that the elected representative is not travelling in the vehicle, they can ask for the identification card issued by the state legislature. These checks are not harassment; they are a response to rampant abuse of exemptions by family members, personal staff, and political freeloaders. For those accustomed to unchecked privilege, accountability feels like an insult. This exposes a deeper malaise—an entrenched VIP racism that treats ordinary citizens as obstacles and equality as an affront. One wonders why a far simpler solution never surfaced in the House. Why not use a regular Fastag and pay like everyone else? The government could easily reimburse the charges or issue annual passes. Even with a standard Fastag, a toll plaza is crossed in mere seconds. But it appears democracy comes under siege when a legislator has to pause for a few seconds behind ordinary motorists.

Predictably, the outrage was palpable across party lines. Opposition leader R Ashoka took the argument further, lamenting the absence of permanently open "VIP lanes" and suggesting that legislators should not be made to wait in line. Speaker U T Khader directed officers to engage with the National Highways Authority of India (NHAI) to address the technical issues. When the NHAI recently reiterated these exemptions, netizens reacted with outrage, questioning why politicians should be treated like kings. But somewhere along the way, legislators seem to have forgotten a basic truth: they are servants of the people, not royalty of a bygone era to demand a fast lane through public life.

The crisis is heading to a point of no return, already impacting half of the world's population

Flawed priorities have led to poor PMKVY outcomes. Skillung must be demand-driven and tied to jobs

SANTOSH MEHROTRA AND HARSHIL SHARMA

The Comptroller and Auditor General (CAG)'s 2025 Performance Audit has underlined the failures in the Pradhan Mantri Kaushal Vikas Yojana (PMKVY). Its verdict is sobering: years of skill programmes have produced mountains of certificates but few employed youth. From 2015-22, three phases of PMKVY were run with a combined outlay of Rs 14,450 crore, yet only about 1.1 crore of the 1.32 crore targeted trainees got certified. Only those certified under short-term training and special projects (56.14 lakh candidates) were tracked for employment outcomes, of whom just 41% (23.18 lakh) secured placements. Indeed, official data show PMKVY claimed a 54% placement rate, but independent analysis pegs the figure at barely 22%. In short, despite high annual budgets, a large share of India's "skilled" workforce remains unemployed or underemployed, or at best, when employed, they are in the unorganised sector. But that is what the poorly educated and school dropouts have done in any case for decades.

The focus of Skill India schemes has been on churning out certificates, often from very short courses, rather than on real learning. PLFS data shows courses longer than two years shrank from 29% (2017-18) to ~14% by 2023-24, while sub-six-month courses rose from 22% to 44%. Recognition of prior learning certifications among current workers soared from 1.45% of the labour force in 2017 to 11.6% by 2023—an inflation of numbers that masks true skill-building. The result is stark: formally certified workers face a 17% rate of unemployment, versus just 4% rate among the informally trained (the latter likely working without credentials). In other words, certificates are not translated into employability.

The CAG audit highlights acute misalignment between where India needs skills and where PMKVY trains people. National Skill Development plans (2015-22) projected over 60% of new skill demand in construction, logistics, hospitality, etc., yet PMKVY's top-trained sectors were electronics, apparel, retail, logistics and beauty/wellness. Apparel alone accounted for 28.4% of all certifications, though

it was not among the top-demand sectors. PLFS data shows that apparel, a labour-intensive sector that should have been creating jobs, saw a fall in employment in the first six years of this government. Similarly, at the state level, >50% of projected gaps were in five large states (Maharashtra, Tamil Nadu, Andhra Pradesh, Uttar Pradesh, and West Bengal), but these saw under 35% of free training. In contrast, Madhya Pradesh, Rajasthan, and Haryana—with relatively lower projected need—accounted for 22% of PMKVY trainees. In plain terms, training was lopsided: e.g. Maharashtra had ~13.2% of skill gap but only ~5.8% of trainees, while Uttar Pradesh had 8.9% of need but 14.8% of trainees.



PMKVY 4.0 (2022-26) was launched with reforms aimed at data and accountability. Candidate registration through Aadhaar-eKYC, Skill India Digital Hub (SIDH) and student guidance through AI were additions. Rewards have shifted from cash to in-kind (kits and training material), and in a big change, placement is no longer a part of these welcome steps. Yet CAG notes they are not fully implemented. As of October 2024, key IT validations still lagged, and in PMKVY 4.0, audits already found under- or unqualified trainees slipping through. Earning the cash reward had at least limited employer demand to the training; removing placement-based incentives could risk further complacency. In short, PMKVY 4.0's e-KYC and SIDH improvements are positive but not sufficient.

Engaging industry on jobs

Beyond these tweaks, the skill mission needs deeper reform. Training must be demand-driven and genuinely industry-led, not just government-mandated. We have long argued, and the CAG data reinforce this conclusion that real employer engagement in curriculum financing, and credentialing is cru-

cial. Other countries operate sectoral training funds or payroll levies that bind firms into the system. More than 40 countries already use such levies to finance vocational training. Brazil's industries impose a 1% payroll tax to fund apprenticeships, and South Africa's "equity training fund" channels corporate levies to upskill marginalised groups. India should explore a similar model: a national skill fund partly raised from firms, not only public coffers. This would incentivise companies to invest in training and provide a much larger and steadier resource base. Public and private sector investment in skills should be complementary—the State building capacity and standards, but firms sharing the cost and owning the content.

The CAG observed that apprentices remain a tiny fraction of the 570-million workforce—only half a million formally—and rightly points out that on-the-job training must grow. We have pointed out that a "collective skill formation" system where firms, colleges, and labour agencies collaborate with clear roles outperforms purely State or purely *laissez-faire* models. The audit itself implies this: it flags that national and state skill missions failed to mobilise industry demand meaningfully. Strengthening Sector Skill Councils with real employer power (and accountability) so curricula match real jobs could be a priority. For this to succeed, the financial involvement of the private sector is necessary.

Finally, skill initiatives must link tightly to jobs. CAG and past studies note the absence of effective labour-market information systems or job-matching. Training without guaranteed placement is wasteful. The Skill India portal could integrate with high-quality job exchanges. Learning from private job platforms and overcoming India's digital divide, a unified "Rozgar Bazaar" linking skills to local vacancies could greatly improve outcomes. Crucially, skill policy should explicitly converge with employment policy, matching trades taught to local demand.

We need a genuine shift towards quality, demand-orientation, and shared responsibility. That means involving the private sector fully in design and finance, building true apprenticeships, and bridging skills and jobs through technology and outreach. A robust public-private skill ecosystem with joint training funds, rigorous curriculum standards, and vibrant job linkages is the way forward. India's demographic dividend depends on it. (Santosh is a research fellow at the IZA Institute of Labour Economics, Bonn; Harshil is a labour economist. Views expressed are personal)

RIGHT IN THE MIDDLE

Walks classified, a taxman's way

Old habits linger as an evening walk turns into a study of human variety

NAJIB SHAH

I live most fortunately in a gated community—an oasis, which seems a million miles away from the cratered roads and the traffic 'hugilia' reality outside. It is a relatively small community—a rough census (no caste or sub-caste details, please) would suggest that the number, including the four-legged furry pets, would be in the region of 400. While all the four-legged variety do go for a walk, many of the other community members also venture out for a walk; to see them walk is most interesting. And I am not talking of the speed.

Some walk looking seriously at the ground beneath their feet, deeply examining their toes or footwear or the asphalt. Not for them the upward glance

at what lies ahead or above. Another lot looks at the distant horizon. Their eyes clouded, almost avoiding any eye contact. The third lot look around for familiar faces, and depending on the time of the day and their disposition at that point in time, smile. You can meet the same person on another day, and they would walk past you with nary a glance. The fourth are the type who wish to say hello and smile but are uncertain about the response. So, they do smile nevertheless and hope that they will get a response.

The fifth, increasingly becoming common, is the type who keeps looking at the phone or with headphones listening to a podcast. They have no time for what is in front of them, beside them or above them. Their mind does not register that they are walking, which is incidental to the activity of seeing or listening. And then there are couples—men invariably seem in a hurry, while women struggle to keep pace. My theory is that the distance between the male and the female is directly proportional

to the number of years of marriage. And then we have children. Loud chatter with even louder guffaws of laughter pierces the late evening, which is when they set out. Full of youthful exuberance, they are not even walking—they are floating in air. And then there are the ambles who walk for the companionship, not for exercise—groups of ladies and gentlemen discussing everything from recipes to the politics of the nation, state and community. And in all these varieties there are those who drag their feet, apparently keen to promote the sales of footwear by rapidly tearing the soles of their footwear.

Talking of varieties, and since I am a (very) retired taxman who cannot resist classification—how else do you tax?—I have also done an exercise of classification of walks. That is a story for another time. But I can tell you my experience—I read that walking backwards is good, and I did it once. A senior citizen saw me with great amazement and a tinge of sympathy. I immediately turned around and have not turned back since!

LETTERS TO THE EDITOR

Missing: Equity in higher education

The Supreme Court's decision to stay the UGC's 2026 regulations on caste-based discrimination raises questions that go far beyond legal technicalities. While the Court's concern about vague definitions and the potential for social division deserves attention, the broader reality of discrimination within higher education should not be brushed aside. At the same time, the Court is right to insist on precision. Regulations that are unclear invite misuse

and erode credibility. What is required is not abandonment, but careful redrafting of definitions that are inclusive, mechanisms that are fair, and safeguards that prevent both exclusion and excess. A casteless society cannot be achieved by denying caste, but by addressing it honestly. The stay should become an opportunity to strengthen, not stall, the pursuit of equity in higher education.

Sruti Bera, Bengaluru

Corrupt system

Appropriately 'Contractors' wars of state-wide stir if Rs 37K or does not cleared' Jan 30, when Congress was in opposition in Karnataka, it aggressively highlighted delayed payments to contractors and alleged commission demands under the BJP government, a campaign that significantly contributed to the BJP's defeat. Today, the Karnataka State Contractors Association files identical charges against the Congress government.

Beyond policy irony, the episode

exposes a deeper systemic failure. Delayed payments and an entrenched commission culture encourage cost-cutting, compromise on craftsmanship, and prolonged execution. N Sadasiva Reddy, Bengaluru

Strategic deal with EU

The India-EU trade agreement marks a pragmatic shift in strategy amidst global disruptions (A deal to deepen trade as strategy, Jan 29). It

wisely moves beyond stalled talks with the US, instead forging a vast economic bloc to bolster mutual resilience. The selective concessions, protecting India's sensitive sectors while opening others, reflect a balanced negotiation. This deal is more than commerce; it is a geopolitical statement. K Chidanand Kumar, Bengaluru

Our readers are welcome to email letters to letters@deccanherald.com (in only letters emailed—not handwritten—will be accepted). All letters must carry the sender's postal address and phone number.

SPEAK OUT



I have never agreed with any wrong comment against Rahul (Gandhi). He is a sincere leader.

Shashi Tharoor, Congress MP

All things are subject to interpretation. Whichever interpretation prevails at a given time is a function of power and not truth.

Friedrich Nietzsche

TO BE PRECISE

Economic Survey calls for re-examination of RTI Act

GOD FORBID SHOULD A JOBBLESS YOUTH ASK WHAT HE'S BEEN DOING SLEEPING BARELY FOUR HOURS A DAY!



IN PERSPECTIVE

Mobility budgets need an equity push

Congestion in cities like Bengaluru can be traced to a skewed budgeting focus on vehicular movement

NITHYA RAMESH AND VENKATKRISHNAN ASURI

Mobility in India's largest cities continues to worsen, with urban sprawl, poor quality of roads, insufficient public transport, and an unchecked increase in private vehicle ownership resulting in increased travel time, productivity drops, and reduced air quality. Nowhere is this connection between broken roads and declining quality of life more evident than in Bengaluru.

Over 2,000 vehicles are added to Bengaluru's roads every day, making it the city with India's highest private car ownership. Bengaluru has 823 vehicles per kilometre of road—a density that has paralysed movement. A Bengaluru citizen spends the equivalent of 3 days and 23 hours in rush hour traffic annually. This translates to an estimated annual loss of Rs 20,000 crore. Road safety, too, is a grave concern with the occurrence of one pedestrian death every 30 hours.

The solution is straightforward and proven globally. Cities cannot be designed for private vehicles; vehicular congestion cannot be solved by building more roads. Instead, cities must prioritise moving people through walkable roads and robust public transit—a combination of buses, trains, and metro. Tokyo and New York City have demonstrated that investing in public transit and managing vehicle demand, rather than endlessly expanding road capacity, delivers better outcomes for citizens and economies.

Yet, Indian cities continue to invest primarily in auto-centric infrastructure: flyovers, signal-free corridors, and ring roads. The problem is not a lack of solutions, but a failure of budget priorities. An equitable budget would enable balanced distribution of resources to address urban mobility holistically.

The first step is to shift the undeniable political and administrative focus on solving for vehicular movement alone, evident from budgetary allocations at the union, state, and city levels. At the union level, there has been inequitable spending on highways vs urban roads. An estimated Rs 7.9 lakh crore has been spent between 2014 and 2023 to build 23,268 km of highways, and Rs 3.96 lakh crore since 2000 to build 8.35 lakh km of rural roads. This has reduced vehicular travel time between cities by up to 50%, and between rural areas and the nearest urban centres by 25-35%. There has been no similar investment in urban roads.

States, too, do not allocate sufficient budgets for urban roads and pedestrian infrastructure—Uttar Pradesh is a

notable exception (the state invested Rs 3,000 crore to develop 285 km of urban roads in 17 municipal corporations with a focus on walkability). At the city level, the pattern of disproportionate spending continues. An analysis of Mumbai, Bengaluru, Chennai, Delhi, and Hyderabad in 2025 shows that on average, 11.8% of city budgets are allocated for mobility infrastructure. Of the entire budget, only 2.98% is earmarked for pedestrian needs and holistic redevelopment of urban roads, with the rest allotted to auto-centric projects. Bengaluru allocated a mere 1.25% for its pedestrian infrastructure—the share was 6.96% for Mumbai, 3.68% for Chennai, and 2.95% for Hyderabad.

An even spread

Solutions must begin with equitable budgets that distribute resources across pedestrian, transit, and vehicular infrastructure. Mobility funding should reflect actual usage patterns, not favour vehicle movement alone. Investing in pedestrian infrastructure moves people faster and improves connectivity to public transport, jobs, and education.

One approach to proportionate allocation: for every rupee invested in auto-centric infrastructure, cities could allocate the same to pedestrian facilities and public transportation. In the 2024 budget, Bengaluru allocated Rs 12,000 crore for the construction of 17 signal-free corridors and Rs 17,698 crore for a 16.7-km tunnel project. Even if Bengaluru matched the tunnel project's budget with equal investment in footpaths and modern buses, the impact would be transformative. At approximately Rs 3 crore per km for a two-metre-wide paved footpath, Rs 8,849 crore would yield around 2,950 km of walkable paths, covering 20% of the city. Allocating the same amount towards modern air-conditioned electric buses, priced at Rs 2 crore per bus, would allow the procurement of around 4,500 new buses. Bengaluru currently has 6,500 buses operational. This approach would move far more people, far faster.

These budgetary allocations need to be supported with mandatory road design standards—such as Tender S.U.R.E., IRC 86, and 103—that focus on pedestrian priority, urban designers in engineering departments to implement the guidelines, and procurement reforms for quality construction and maintenance.

With planning for the 2026-27 budget underway, the newly-formed Greater Bengaluru Authority can pioneer an approach where budgets reflect how citizens actually move, with substantial allocations for pedestrian infrastructure, public transit, and complete streets. For Bengaluru's residents, this decision could shape the quality of life for decades to come.

(Nithya is Director—Planning and Design, Jana Urban Space Foundation; Venkatkrishnan is a student at IIT Madras)



LOKMAT TIMES

Digital prudence

Digital addiction is insidiously colonising Indian children, threatening their holistic development.

The Economic Survey 2025-26 delivers a sobering indictment. Digital addiction is insidiously colonising Indian children, threatening their holistic development. Amid 900 million smartphone users, which includes over 250 million under-18, National Sample Survey Organisation (NSSO) findings reveal 62 per cent of children aged 8-17 spend 4-6 hours daily glued to screens. This shows a 28 per cent surge since 2022. This relentless exposure correlates with shattered attention spans which is down to 47 seconds, as per Microsoft metrics, chronic sleep loss affecting 72 per cent of teens, and a staggering 38 per cent rise in adolescent mental health issues like anxiety and depression. Online gaming disorders now plague 17 per cent of urban youth as TikTok Reels, Instagram Stories, and battles exploit dopamine loops, sidelining academics, physical activity and face-to-face interactions. The Survey prescribes prudence as the antidote and calls for structured screen budgets, vigilant parental modelling, and nationwide digital literacy drives to foster resilient minds.

This epidemic resonates globally, spurring decisive interventions. Australia's trailblazing legislation, enforced from January 2026, outright bans social media for under-16s across platforms like Meta, ByteDance, and Snapchat. Backed by AUD 50 million fines, it deploys advanced age-verification tools such as Yoti's facial scans and government ID cross-checks, with early pilots showing 85 per cent compliance in urban trials. Domestically, Karnataka's ambitious January 2026 pilot arms 5,000 government schools with mandatory app blockers. AI monitors, and 10,000 fines for non-compliant parents. Goa's path-breaking bill, passed in December 2025, extends this to all under-16s statewide, imposing steeper 50,000 penalties, school-level audits, and helplines for violations.

Yet, the devil resides in implementation, a minefield of practical and ethical quagmires. Australia's rollout stumbles with 22 per cent evasion via VPNs, parental proxies, and fake accounts, compounded by privacy uprisors over biometric data retention. India's terrain is thornier with 68 per cent of rural schools lacking reliable internet. It calls for tackling overworked teachers untrained in tech oversight, and multi-device households complicating enforcement. Karnataka's scheme already lags 32 per cent circumvention through secondary SIMs while Goa faces acute urban-rural chasms, with tribal areas underserved. Heavy-handed bans lead to rebellion as youth-driven dark web forums, underground apps, or even emulation of China's stifling Great Firewall, stifle free expression. Prudence goes beyond prohibition to a layered ecosystem. Roll out Aadhaar-verified age gates nationwide, subsidized via CSR mandates for affordability. Infuse CBSE and state curricula with compulsory modules like "unplugged Fridays," peer-led cyber-safety sessions, and gamified wellness apps. Amend IT Rules 2021 to compel platforms for "addiction audits," daily scroll caps akin to Europe's Digital Services Act, and transparent algorithms.

Regressive theocracy

Parliamentarian Fazlur Rehman ignites a firestorm in Pakistan National Assembly

In a stark exhibition that underscores Pakistan's deepening entanglement with regressive theocracy, Jamiat Ulema-e-Islam (JUI-F) chief Maulana Fazlur Rehman has ignited a firestorm in the National Assembly over the proposed Prevention of Child Marriage Act. Rehman's strident opposition, terming the legislation as an assault on Islamic tenets, reveals not just personal bigotry but the iron grip of Sharia proponents on the nation's legislative essence. By whipping up a controversy with fiery speeches and threats of street protests, he exemplifies how religious hardliners continue to rule the roost, thwarting modern reforms and consigning Pakistani women and children to medieval obscurity.

The bill, tabled to uniformly raise the marriage age to 18 for both genders, targets a blight that devastates lives. Over 18,000 girls under-18 are married annually, according to UNICEF estimates, often in rural strongholds like Khyber Pakhtunkhwa where JUI-F holds sway. Child marriage entrenches poverty, spikes maternal mortality, as girls under-15 are five times more likely to die in childbirth. It further perpetuates illiteracy, with married minors dropping out of school en masse. Yet Rehman, flanked by his clerical allies, thundered that it defies Sharia, peddling the toxic notion that puberty equates to consent. His choreographed walkout and rallying cry of "jihad against Western-imposed laws" weren't isolated theatrics; they mirror a systemic blockade.

This dominance stems from Pakistan's constitutional bias, skewed as it is toward theocracy since Zia-ul-Haq's 1979 Islamisation drive. The Council of Islamic Ideology (CII), a powerful body of ulema, routinely issues fatwas torpedoing reforms while declaring or rejecting DNA evidence in rape cases as un-Sharia. Political expediency amplifies this. For instance, Imran Khan's Pakistan Tehreek-e-Insaf (PTI) government infamously diluted anti-rape laws ostensibly under clerical pressure, while Shehbaz Sharif's coalition now buckles down to JUI-F to secure votes. Blasphemy laws, weaponized 1,500 times since 1987 breed bad justice, as seen in the 2023 Jaranwala church burnings. Madrassa networks, numbering over 30,000, indoctrinate youth, fueling Taliban resurgence and cross-border terror. Rehman's resurgence-bolstered by his party's 2024 election gains-signals Sharia's electoral clout. In Khyber Pakhtunkhwa and Balochistan, JUI-F governs, enforcing gender segregation. Until Sharia's Mullahs are dethroned, Rehman's triumphs will echo the screams of child brides, sentencing a nation to perpetual darkness.

'Sanghosti' & 'Paraakaastha' for research

Indigenous philosophical frameworks need to be assessed and adopted for innovation in India



Dr S S Mantha

Today, the education space too, needs to be disrupted like every other. Hundreds of PhD's and thousands of research publications are being produced in the country without a converging theme, and acceptable quality. Shouldn't applied research focus on productization rather than mere thrust on publishing papers? Indian products would not only aid creating new markets, but also create new employment opportunities. Can the disruption however, this time, look at what the ancient wisdom tells us?

Two Hindu philosophical constructs, 'Sanghosti' and 'Paraakaastha' offer profound conceptual foundations. While sanghosti underscores the power of collective dialogue and shared wisdom, paraakaastha ha inspires the relentless pursuit of excellence and transformative impact. Together, they provide a culturally resonant, ethically grounded, and strategically robust framework for national R&D.

Research and Development (R&D) is extremely important to national progress, economic growth, technological advancement, and societal well-being. Most of the contemporary discussions on R&D rely on Western models of innovation systems and knowledge economies. Should we not assess and adopt our indigenous philosophical frameworks? They too offer equally profound insights. Both 'sanghosti' and 'paraakaastha' provide culturally rooted and ethically grounded ideas through which our R&D ecosystems can be conceptualized, strengthened, and sustained. Both emphasize collective wisdom, dialogue, excellence, and the pursuit of the highest potential, values that are deeply relevant to modern research environments.

Sanghosti, refers to a collective assembly, dialogue, or deliberative gathering aimed at shared understanding and decision-making. In ancient India, 'Sanghasthis' were forums where scholars, sages, and thinkers engaged in intellectual debate, knowledge exchange, and problem-solving. In the context of national R&D, sanghosti symbolizes collaborative research culture, interdisciplinary engagement, and inclusive knowledge creation.



Doctoral training, for instance, can be redesigned to emphasize teamwork, ethical reflection, and high-impact research outcomes.

Several modern R&D challenges, such as climate change, public health crises, energy security, and digital transformation are complex and interconnected, requiring collective intelligence rather than isolated efforts.

That said, many of the universities, professional colleges, unfortunately, do not have the environment that motivates the faculty to do research, leave alone sanghosti. Unless the quality of research and knowledge created is of a high order, a paper cannot be published in a top-ranking journal that is cited upon by others. To write such a paper, faculty members constantly have to update themselves by reading, participate in discussions, experience and experiment with innovations, in inter and multi-disciplinary areas and create consultancy linkages with the industry. Research is a philosophy and is as sacred as religion. Sanghosti is the catalyst to drive it. Of course, enormous funding is required, much more than the 0.7 per cent of GDP that is currently spent. Facilities must be created and a research ambience provided, so that the teachers are motivated enough to spend time in the laboratories.

A sanghosti based approach promotes collaboration among universities, research institutions, industries, government bodies, and local communities, fostering an ecosystem where diverse perspectives converge to generate innovative solutions.

In our R&D framework, sanghosti can manifest through institutional mechanisms such as research consortia, innovation clusters, policy dialogues, and pub-

lic-private partnerships. They all encourage open communication, mutual learning, and co-creation of knowledge. Just as ancient 'sanghasthis' valued respectful debate and intellectual humility, modern research environments benefit from openness to critique, replication, and refinement. This approach not only accelerates innovation but also enhances research integrity and societal relevance. By embedding sanghosti into R&D policy and practice, we cultivate a participatory research culture that democratizes knowledge and aligns scientific pursuits with societal needs.

Paraakaastha ha, denotes the highest point, ultimate excellence, or the culmination of effort. It represents an aspirational ideal, pushing boundaries to achieve the best possible outcome. In R&D, this construct aligns with the pursuit of scientific excellence, breakthrough innovations, and global leadership in knowledge creation. We must commit to paraakaastha ha in our R&D that leads to transformative discoveries that redefine industries and improve human life and not settle for incremental progress alone as happens with the western models.

Paraakaastha ha in our national R&D implies sustained investment in advanced infrastructure, human capital, and long-term research agendas. It emphasizes nurturing researchers who are not only technically competent but also driven by curiosity, discipline, and ethical responsibility. Excellence is inseparable from 'dharma' or righteous conduct, suggesting that the pursuit of paraakaastha ha in R&D must be guided by ethical considerations. This is particularly relevant

in areas such as artificial intelligence, biotechnology, and defense research, where technological capability must be balanced with social responsibility and human values.

The integration of sanghosti and paraakaastha ha creates a balanced R&D paradigm, one that harmonizes collaboration with excellence. Sanghosti ensures that research efforts are inclusive, context-sensitive, and socially embedded, while paraakaastha ha ensures that these efforts aim for the highest standards of quality and impact. Together, they counter two common pitfalls in our national R&D systems: Fragmentation and mediocrity. Fragmentation arises when institutions work in silos without meaningful interaction, whereas mediocrity results from lack of ambition or undue conservatism. The combined application of both constructs fosters cohesive, ambitious, and purpose-driven research ecosystems.

From a policy perspective, the universities, research establishments and the government can operationalize these constructs by encouraging interdisciplinary funding programs, national research missions, and platforms for continuous dialogue between scientists and policymakers. Education imparted in the universities must play a critical role by inculcating values of collaborative inquiry ie, sanghosti and excellence-oriented learning ie, paraakaastha ha from an early stage. Doctoral training, for instance, can be redesigned to emphasize teamwork, ethical reflection, and high-impact research outcomes.

Furthermore, sanghosti extends beyond elite institutions to include Bharatiya knowledge systems and grassroots innovation. By recognizing farmers, artisans, and local innovators as contributors to national R&D, we can enrich our knowledge base and ensure inclusive development. Paraakaastha ha, in this context, is not merely technological superiority but the achievement of sustainable and equitable progress. By integrating these timeless principles into modern innovation systems, we can build research ecosystems that are not only globally competitive but also truly meaningful and morally anchored.

The author is former chairman, AICTE and chancellor, RBU, Nagpur. Views expressed are personal.

Let's take Gita Gopinath seriously



Abhilash Khandekar
POLITICS & BEYOND

The World Economic Forum (WEF) at Davos was not expected to ruffle the feathers of Indian politicians. They were making merry there, besides attracting large investments into India. They have succeeded in that endeavour, as we were told.

Some were there with families and must have enjoyed the beauty of the world-famous Alps region while doing expensive shopping for which Switzerland is globally known. It's a gorgeous little country that welcomes lakhs of tourists each year.

So, little indulgence in extravagance here and there, with personal and public money, on official jaunts, can be condoned.

In any case, the submissive, hapless and timid lot of the Indian voter won't mind much. The voters are also large-hearted; they don't mind mindless displays through water pipelines, minister's arrogant behaviour on camera, refusal for resignations, their changing of parties overnight; consistent fall of rupee, or Palagang attack. So why would they object to those enjoying themselves in Davos?

But little did they realize that there was one Gita Gopinath, a scholarly financial brain, who knew India inside out. She appeared as a friend of India, having had origins in this great country. Those in Davos also did not probably know she was contacted by a TV journalist to talk about India's potential in future as



global business power. On a TV interview, seated next to a top industrialist and a smart Indian minister, she suddenly sounded patriotic. Of course, she was very serious during the entire interview and gave balanced, calculated responses when the green-horn lady anchor from Delhi asked the experienced panel different questions.

That the Indian-American economist, having studied at prestigious Princeton University, had served as the chief economist at the International Monetary Fund (IMF), added to her stature and significance to her remarks. In her mid-50s, Dr Gopinath is a great speaker—confident and erudite. She knows her subject well. Or else, after her great stint at the global financial institution IMF, she would not have got a teaching job at the Harvard University of America. Luckily, there is not UGC type system in the US.

Some people back home make mockery of the world-famous, 390-year-old university is worth 'pardonable'.

But how did the young brilliant woman of fame ruffle the feathers of Indian politicians?

Actually, she made a small mistake. She mixed business with pollution and inadvertently hit where it hurts the most!

To a question from anchor Kalli Purie, Gita Gopinath, gently mentioned that Indian economic development was fraught with a big risk of pollution, but it is more serious a situation than the American tariffs. "Indians should worry more about that," she stated.

That qualified statement from a global expert who is non-aligned to any Indian political outfit in India, spoils the Davos party suddenly.

Of course, we have our own Dr Sunita Narain, the environmentalist who spent almost her full adult life fighting pollution and alerting governments about environmental damages. Some governments heard her; others chose to ignore. Her powerful voice got weakened over the past decade, though her crusade continues.

But Gopinath speaking about Indian pollution? That was the

least expected 'investment proposal' from Davos. No state had inked a deal with her; it sounded like an atom bomb.

Did she say anything wrong? Leave Delhi for a moment, almost, all Indian cities are facing bad air quality crisis for decades which is going from bad to worse. Entire north India is reeling under it with Government appearing clueless.

I went to Kolkata last week and saw no difference there: Bhopal, once a green capital, can see dust-laden trees which barely be able to breathe. The 2.5 PM is being inhaled by all and sundry. Indore, the cleanest city is full of dust.

People are not dying of contaminated water alone, pollution is silently killing them, a fact that Gopinath split out in a dignified manner.

Year after year, global lists indicate to grave pollution of India but there are no concrete actions from Government which appeared to be caught on the wrong foot when the globally acclaimed economist pointed to the problem with good intention. But some stupid 'Bhaktis' began trolling her on the social media. They accused her of changing the topic, which she did not actually.

Its time India took the economic expert much more seriously to save thousands of lives that perish each year. Tourists have started coming to parts of India gradually, one hears.

Indians, especially the elderly ones and those engaged in unorganized sector, are the most vulnerable. Government must care for them.

The author is a senior journalist. Views expressed are personal.

Send your letters to the Editor, Lokmat Times, Lokmat Bhawan, Jalna Road, Chhatrapati Sambhajnagar (Aurangabad), E-mail: litedit.abd@lokmat.com

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THE GOAN EVERYDAY

Either you run the day or the day runs you
Jim Kohn

SC sees through the rhetoric and reality on stray dogs

The Supreme Court came down heavily on State governments over poor compliance with directives on stray dogs. The court flagged inadequate sterilisation, shelters and fencing. "They (States) are building castles in the air", and are engaged in "storytelling", were some of the pointed remarks of the bench. Interestingly, the court also noted that tourism is being impacted by the presence of stray dogs on beaches in Goa.

While the observations were applicable broadly to States which have failed on this count, Goa finds itself in that pool because there has been a miserable failure in policy execution. Efforts to control the growing dog population are falling woefully short. Plans of installing dog shelters, initiating sterilisation programmes and the Education Department's circular mandating fencing of school premises have been largely on paper. Stray dogs continue to rule the nooks and corners, roads and public spaces, including hospitals and beaches.

Goa has reason to be worried because statistics depict a grim picture. Data shows that the 11,899 dog bite cases in 2023 shot up to 19,000-plus in 2025, aggregating to over 60 per cent increase in three years. The Animal Birth Control Programme, which is supposed to be the primary plan of sustainable stray dog management, appears to have lost steam. Data also reveals that several municipalities had conducted no sterilisation camps despite funds being sanctioned.

The Supreme Court's critical comments reflect a deep frustration between promises and reality, and one is left wondering whether the political class is genuinely interested in this issue because the stray dogs issue doesn't yield political mileage

This is a poor reflection of neglect and insensitivity to the issue at hand.

It is sad that the Supreme Court had to raise an alarm and pointedly say that the stray dog issue is hurting Goa's tourism. For a State that is considering tourism as its "bread-and-butter" sector, this should have been an introspection by default and a top priority, especially when the discourse is repeatedly veering around quality and high-spending foreign tourists. No foreigner would like to be chased by dogs or bitten while on a stroll on the beach.

A responsible Tourism Department should be serious in tackling the root of the problem, rather than trying desperately to contain the damage.

There is no denying that Goa has taken baby steps in the formation of a task force, signing of MoUs for new shelters, and circulars to fence school premises, but the urgency in fixing the issue at hand is not visible. Goa is staring at an estimated 56,000-plus stray dog population, and it's growing bigger every passing year. There are no government-run dog shelters in the State at this point, nor is the sterilisation programme consistent.

The political and administrative reluctance to act decisively is evident and which is why we see dogs at the GMC campus, at district hospitals and even at the South Goa Collectorate. The Supreme Court's critical comments reflect a deep frustration between promises and reality, and one is left wondering whether the political class is genuinely interested in this issue because the stray dogs issue doesn't yield political mileage.

It is plausible that policymakers are paying lip service to the issue. Stray dog management cannot be a five-year plan, because there are consequences. The State must fast-track plans for setting up shelters and continue sterilisation programmes round the year. The departments must move beyond rhetoric and take urgent, transparent steps to address this crisis; failing which, public safety, animal welfare, and the State's reputation will continue to suffer.

OPEN SPACE >>

Cutting trees, planting promises

I am writing in response to a news article stating that over 33,000 saplings are yet to be planted to compensate for trees cut down for road infrastructure projects over the past five years. What is the Environment Ministry doing? The reason we have this ministry is that development needs a balanced approach; otherwise, all regions of the country will face problems like air and water pollution and an erratic climate, causing calamities like flooding and fires. Many regions are already facing these issues.

Instead of appreciating the blessings our country has received - fertile soil, predictable weather, and moderate temperatures - corrupt politicians and capitalists want to exploit them without considering the repercussions. Replacing 100-year-old trees with saplings is inadequate, and they are often neglected afterwards. Fortunately, our third pillar of democracy - the judiciary - is active and occasionally intervenes to prevent the greedy from destroying what is required to keep us healthy and alive. I think the government should focus on controlling human overpopulation rather than pursuing more infrastructure projects.

ALWYN FERNANDES, Benaolim

Courage behind India's budget

Economic Survey calls us to choose maturity over convenience. If we respond with courage, India will help shape the next stable world order



SHAILESH HARIBHAKTI

>The writer is a Chartered Accountant

India enters 2026 at a rare inflection point in history. Our macroeconomic fundamentals are among the strongest we have seen in decades. Growth is resilient; inflation is tamed; infrastructure creation is accelerating; digital public infrastructure is quietly transforming citizen interfaces; and capital formation is returning to the centre of policy imagination. And yet, the world around us has become structurally fragile.

Geopolitics now shapes trade more than economics. Capital flows respond more to fear than to fundamentals. Technology investments are leveraged in ways that create systemic risk. Supply chains are being redesigned for security rather than efficiency. The margin for error in global markets has become thin. In such a world, the old idea that "growth alone will protect us" is dangerously inadequate. What protects nations today is institutional credibility, execution capacity, and adaptive governance.

The Economic Survey 2025-26 captures this truth with refreshing intellectual honesty. It recognises three overlapping global risk regimes - managed volatility, disorderly fragmentation, and low-probability but high-impact systemic shocks. In all three scenarios, India remains relatively better positioned than most economies but not insulated. Our real vulnerability is not growth; it is our dependence on external capital flows and the cost of capital that follows. Which means our real mission is not merely GDP expansion; it is building strategic resilience and strategic indispensability.

The Quiet Revolution

Perhaps the most powerful signal in this year's survey is not fiscal arithmetic or sectoral growth projections; it is the philosophical shift in how the state views itself. We are witnessing a transition from a compliance-driven administrative state to an entrepreneurial, capability-building state. Deregulation is no longer cosmetic; inspection regimes are being replaced with trust-based self-certification; outdated criminal provisions are being dismantled; digital approvals are compressing time-to-market; and state governments are competing to re-

India's real strength lies not just in growth, but in institutional credibility, execution capacity, and trust-based governance. The Economic Survey urges a shift from compliance to capability, calling for long-term resilience, disciplined policymaking, and strategic indispensability in a volatile global order



duce friction, not increase control. This is governance maturity.

When administrative energy moves away from policing to coordination, monitoring, and problem-solving, productivity rises invisibly but powerfully. Investment accelerates not because subsidies increase but because uncertainty collapses.

Taxation Learns to Trust Citizens

Equally transformative is the quiet reinvention of tax administration. Instead of chasing compliance through fear, the system is now nudging voluntary accuracy using data, behavioural science, and transparent communication. Millions of taxpayers are self-correcting. Litigation is reducing. Friction is falling. Revenues are rising - not through coercion, but through trust. This is what digital governance was always meant to achieve. When compliance becomes effortless and predictable, enterprise flourishes. Capital formation deepens. Formalisation accelerates. Social contract strengthens. Trust, once institutionalised, becomes the highest-return public investment.

The New Compact

Implicitly proposes a new national compact. The state must build execution capacity, not procedural fortress. Enterprises must pursue global competitiveness, not negotiated shelter. Citizens must continuously reskill, remain productive, and embrace responsible digital behaviour. Economic power today is no longer merely about size; it is about institutional quality multiplied by execution velocity. Nations that master this equation will shape the next global order.

What the Budget is Really Signaling

Behind the numbers, the budget is sending four powerful messages:

- Capital expenditure and infrastructure remain the primary growth engine.
- Human capital investments are strategic, not social spending.
- Fiscal discipline is a national asset in a volatile world.
- Technology-enabled governance will increasingly replace manual bureaucracy.
- This is not populism; this is long-cycle nation building.

From Growth to Indispensability

India's ambition must now evolve: from growth to resilience; from resilience to indispensability; and from scale to system excellence. Strategic indispensability means the world needs India not merely as a market but as a reliable manufacturing base, a trusted digital infrastructure partner, a stable financial ecosystem, a clean energy engine, and a governance model that actually works at population scale.

This is where India's true comparative advantage lies. We have demonstrated that democracy, scale, and digital capability can coexist. Now we must demonstrate that execution excellence and institutional trust can scale with equal speed.

The Deeper Choice Before Us

Every generation faces a defining choice - between short-term comfort and long-term capability; between procedural safety and adaptive courage; between transactional governance and transformational stewardship.

The Economic Survey quietly calls us to choose maturity over convenience. If we respond with courage, discipline, and collective intent, India will not merely survive global volatility; it will help shape the next stable world order. That is the opportunity of our time. (FFI)

THE INBOX >>

2027 Census must reveal real poverty, unemployment

The Census of India 2027 should, in fact, collect detailed information on individuals, including occupation and education, for the first time since 1931. The two-phase, fully digital exercise - covering house-listing (April-Sept 2026) and population enumeration (Feb 2027) - will also generate significant temporary employment; however, there will be a self-enumeration app for uploading by the public. This is a good source. The population enumeration phase (February 2027) is likely to cover key individual attributes, including occupation, and this is important. It is leamed that the project will create approximately 1.02 crore man-days of work, engaging around 18,600 technical personnel for about 550 days at local levels. But this will be temporary employment. The Census indicates that the 33 questions will cover, besides occupation, amenities, demographic details, and caste for SCs, STs, and OBCs. This census should disclose the genuine poverty and unemployment of the country to fulfil the economic conditions of fellow citizens.

RAJESH BANAUJLIKAR, Arpora

Demonetised cash refuses to disappear

The alleged robbery of Rs 400 crore at Chorla Ghat in Belagavi district, near the Karnataka-Goa-Maharashtra border, has triggered a major investigation after the complainant claimed the cash was being transported in two trucks. The money was reportedly in Rs 2,000 denomination notes, which are no longer in circulation. The case has been linked to the abduction of a youth from Nashik, and several arrests have been made. Investigators are probing possible interstate links and the involvement of organised crime. Although several years have passed

Online OPD booking at GMC could marginalise the poor

The announcement that Goa Medical College Hospital (GMC) will introduce online OPD booking from February 4. While digitisation of public services is welcome, this particular move raises serious questions about accessibility and fairness. GMC is a public institution, funded by taxpayers' money, and primarily meant to serve the poor, the elderly, daily wage workers, and people from rural and semi-urban areas. For many of these citizens, owning an Android smartphone, having internet access, or navigating online booking apps is not a reality. A large section of the poor basically use mobile phones only for making calls. Expecting them to compete for limited OPD slots through online booking is unrealistic and unfair. In practice, this system will naturally favour the educated, the digitally savvy, and those with better resources. The offline appointment process for the remaining slots will reportedly continue in parallel and can be availed through the existing queue system. But there is a hitch. Those who can book faster online will get first preference, while the poor who will have to stand in the queue will be marginalised.

The intention behind online OPD booking may be to reduce crowding and improve efficiency. However, technology should not be a barrier to services. One suggestion would be to have a common numbering system for both online and offline booking instead of the first-come, first-served basis, which will favour online booking.

ADELMO FERNANDES, Vasco

since demonetisation, large amounts of demonetised cash are still surfacing. Such cash is often suspected to be converted through political or illegal channels.

The incident, which took place in October 2025, has sent shockwaves across the country. It has intensified allegations linking black money to high-level political funding ahead of civic elections, raising fresh questions about how demonetised currency continues to resurface.

KG VILOP, Chanao

Power of public voices

The government's decision to shift the

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proposed unit mall at Chimal to another location, after a sustained protest by local residents, is a welcome step. Projects like this should not be pushed through without consulting the people living in the area, including those affected in the neighbourhood around Toyar lake.

For a long time, people remained silent as rapid urbanisation changed our villages. However, after former judge Fernando Rebello gave the call "Enough is enough", people have finally woken up. Many more such agitations are likely to follow in other places. The question now is whether the government will take this seriously or continue to be guided by its Delhi lobby.

LUCAS D'SOUZA, Verna

Who will hold GCZMA officials accountable?

The Goa Coastal Zone Management Authority (GCZMA) is meant to protect the coast. However, it is often in the news for doing the opposite by giving controversial approvals that are damaging the coastline.

The authority has been pulled up many times by the National Green Tribunal, the High Court and even the Supreme Court. Despite this, a serious question remains: why are the officials responsible not prosecuted to the fullest extent of the law?

This should include heavy personal fines and even jail terms where violations are proven. If the courts are truly serious about stopping the destruction of the coast and repeated illegalities, strict punishment is necessary.

It is also difficult to ignore the strong suspicion that corruption plays a role in the cases. Strong action against erring officials is essential if coastal protection laws are to have any real meaning.

ARWIN MESQUITA, Cola



Telangana Today
FOR LOCAL TO GLOBAL NEWS

Cautious optimism

At a time when the Indian economy is facing global headwinds and erosion of rules-based international order, the Economic Survey 2025-26, tabled in Parliament ahead of the union Budget presentation, paints a picture of cautious optimism. It highlighted the paradoxes facing the economy. While acknowledging the country's robust and resilient macroeconomic fundamentals despite the global slowdown, the Survey has raised red flags on a range of issues that require well-calibrated policy choices and interventions. On the positive side, India's GDP is expected to grow in the range of 6.8% to 7.2% in the next financial year, reinforcing its status as the world's fastest-growing major economy. Retail inflation has remained muted, while both corporate and bank balance sheets are healthy. The rationalisation of the GST rates has created a sense of buoyancy. However, the Survey report flagged about the falling currency, lack of investment appetite among the corporates, sluggish merchandise exports, and drying up of foreign capital inflows. Sustaining growth at 7% over the medium term, amid an uncertain global environment, will be challenging. The global economic system, reeling under geopolitical tensions, trade disruptions and financial volatility, no longer rewards macroeconomic success with currency stability, capital inflows or strategic insulation, while gains from new technologies like artificial intelligence (AI) are uneven and require supportive human capital and regulatory frameworks. Uncertainty over the much-delayed India-US trade deal is set to persist, with the Survey saying that ongoing negotiations are "expected to conclude during the year".

Amid global slowdown and erosion of the rules-based international order, the Survey signals tempered hope

For the time being, India is hoping that the euphoria over its historic pact with the European union will last long, yielding big benefits. An overall outlook is one of cautious optimism. This reflects the strength of domestic demand and consumption even as external risks — from tariffs to supply-chain stress — temper expectations. Interestingly, the Survey advocates "Swadeshi" model, saying it is "inevitable and necessary" as the global trading environment is marked by export controls, technology denial regimes, and carbon border mechanisms that signal the end of "naïve globalisation". The report lamented the relative lack of willingness among Indian corporates to invest in long-term risk mitigation and enhance their global competitiveness. India needs to scale up private participation in building infrastructure. After prioritising infrastructure spending through direct budgetary support, central government capital expenditure is now normalising, making a rise in private capex essential for a sustainable investment boost. It suggested that the Budget should continue to support capex, aligning it with fiscal consolidation goals. It should simultaneously create an environment that encourages private investment and public-private partnership in infrastructure. The Survey has raked up a controversy by calling for re-examining the two-decade-old Right To Information (RTI) Act to exempt confidential reports and draft comments from disclosures, saying that such provisions constrain governance. This suggestion is politically divisive, considering that the citizen-centric law was enacted by the UPA government.

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VIEWPOINT

HYDERABAD, Saturday, January 31, 2026



ROB JETTEN
Dutch premier-in-waiting

“We can continue talking about the US, but what we should do instead is make sure European cooperation is strengthened — that we can guarantee security for our own citizens



MALLIKARJUN KHARGE
Congress president

The Survey has called for 're-examination' of the RTI Act. It also suggests a possible 'Ministerial veto' to withhold information... After killing MGNREGA, is it RTI's turn to get murdered?



VARUN GHARG
Palestinian Foreign Minister of State

Any attempt at forging peace is welcome because it gives hope. But we want this plan to be tied to something bigger, a clear path that leads to Palestinian independence

Framework, not endpoint

Beyond tariffs, the India-EU trade deal reflects a strategic response to global uncertainty



Dr. MALLIKARJUNA NAIK VADITHE

After nearly 18 years of intermittent negotiations, India and the European union have concluded a comprehensive Free Trade Agreement (FTA), marking India's most economically significant and regularly deep trade pact to date. In terms of combined GDP, market size, and rule-making influence, the EU represents the largest economic bloc. The agreement must, therefore, be analysed not as a routine tariff-liberalisation exercise but as a structural repositioning of India within a rapidly fragmenting global trade order.

The original India-EU Broad-based Trade and Investment Agreement (BTIA), launched in 2007, stalled after 2013 due to disagreements over tariffs, intellectual property protection, data localisation, public procurement, and regulatory standards.

The relaunch of negotiations in 2022 coincided with a fundamentally altered global trade environment characterised by post-pandemic supply-chain disruptions, geopolitical realignments, heightened protectionism in advanced economies, and the strategic recalibration of firms under China-plus-one strategies. In this context, the India-EU FTA reflects not only bilateral economic logic but also systemic responses to global uncertainty.

Trade Trends

Between FY21 and FY25, India's exports to the EU expanded by more than 83 per cent, while imports increased at a relatively moderate pace, countering concerns that a deep FTA with a developed bloc would inevitably worsen India's trade deficit. From a microeconomic standpoint, the observed export growth under MFN (Most Favoured Nation) conditions suggests the presence of strong demand-side fundamentals and competitive niches for Indian products in the EU market. The FTA,



therefore, functions primarily as a friction-reducing mechanism that can amplify existing trade flows rather than generate artificial trade diversion.

Sectoral Composition

India's export basket to the EU is diversified but remains anchored in labour-intensive, resource-based, and intermediate manufacturing sectors. These sectors are of particular importance from a development and employment perspective. Labour-intensive sectors such as textiles, apparel, handicrafts, leather goods, and gems and jewellery occupy a central position in exports. These sectors are particularly sensitive to tariff margins, as EU import duties on textiles and apparel typically range from 8 per cent to 12 per cent. Competing exporters such as Bangladesh and Vietnam already enjoy preferential access to the EU market, placing Indian producers at a relative disadvantage.

The FTA corrects this asymmetry by restoring tariff parity and improving price competitiveness. From a socio-economic perspective, this has implications beyond export earnings, as these sectors employ large numbers of low- and semi-skilled workers, many of whom are concentrated in MSME clusters. Government estimates indicate that tariff liberalisation and regulatory facilitation under the agreement could unlock the export potential of approximately Rs 6.4 lakh crore over the medium term, implying significant employment and income multipliers.

Imports, Tech Transfer

India's imports from the EU are mainly capital- and technology-intensive goods, unlike its exports. This difference matters because these imports are mostly intermediate and capital goods, not final consumer products. Aircraft components, industrial machinery, medical equipment, and advanced tele-

com instruments serve as inputs into domestic manufacturing, infrastructure, healthcare, and digital connectivity.

Consequently, the FTA's import effects are likely to be productivity-enhancing rather than consumption-distorting. From a research perspective, this pattern suggests that the FTA may facilitate the diffusion of technology and industrial upgrading. By lowering the cost of high-quality capital goods, the agreement supports India's long-term competitiveness and complements its domestic industrial policies, such as the Production-Linked Incentive schemes.

Non-Tariff Dimensions

A defining feature of the pact is its regulatory depth. The agreement spans goods, services, trade rules, investment protection, and sustainability standards across approximately 20 chapters. Unlike tariff-focused FTAs, this agreement embeds trade within a broader regulatory and framework. Non-tariff measures are the main challenge for Indian exporters. EU regulations such as the Carbon Border Adjustment Mechanism, deforestation-free supply-chain requirements, chemical standards under REACH, and traceability norms for textiles and electric-vehicle batteries raise compliance costs and operate as de facto trade barriers, particularly for MSMEs. The agreement does not eliminate these regulatory instruments

The success will depend on domestic preparedness, MSME compliance capacity, and India's ability to translate market access into competitiveness

but institutionalises mechanisms for dialogue, transparency, and phased adjustment. Simultaneously, the EU has raised concerns over India's quality control orders and localisation policies. The FTA thus reflects a negotiated equilibrium in which regulatory differences are managed through structured engagement.

Services Trade, Data Governance

Services trade represents one of India's strongest comparative advantages and forms a strategically important component of the agreement. India has sought recognition as a data-secure country under the EU's General Data Protection Regulation framework, a move that would significantly ease digital services exports.

Provisions governing the temporary movement of skilled professionals are expected to benefit information technology, consulting, financial services, and healthcare. This marks a shift from a goods-centric trade agreement to a hybrid model that includes digital trade, data governance, and human capital mobility, with potential long-term gains exceeding those from tariff cuts in goods trade.

At the strategic level, the FTA aligns with the Atmanirbhar Bharat approach, which emphasises integration into global value chains rather than inward-looking autarky. It enhances trade diversification and provides a stable export destination amid rising US tariff uncertainty and global geopolitical tensions. Macroeconomically, improved export earnings, technology-oriented imports, and potential investment inflows are likely to strengthen India's external sector resilience. However, the realisation of these gains will depend on domestic preparedness, including infrastructure quality, standards compliance capacity, and institutional coordination across Ministries and States.

To Sum Up

The agreement represents a structural recalibration of India's trade policy towards comprehensive, rules-based engagement with an advanced economic bloc. Empirical trade data indicate substantial upside potential, particularly in labour-intensive manufacturing and services. At the same time, the agreement's regulatory depth imposes new demands on India's export ecosystem, particularly on MSMEs.

From a research-informed perspective, the agreement should be viewed not as an endpoint but as an enabling framework. Its developmental outcomes will be determined by the quality of implementation, the momentum of domestic reform, and India's ability to translate market access into sustained competitiveness and inclusive growth.

(The author is ICSSR-Postdoctoral Fellow, Centre for Economic and Social Studies [CESS])

Letters to the Editor

Editor

Fearful state

This refers to 'Pakistan blocks telanganatoday.com' (Jan 30). The Pakistan government's decision to block the Telangana Today website is a brazen attack on free expression and independent journalism. Telangana Today carries accurate, balanced reporting and expert commentary, and its silencing reveals a deep intolerance for credible scrutiny. However, expecting democratic maturity from Pakistan is increasingly unrealistic. The country today stands exposed before the world for a political order effectively dictated by the army chief, not by elected institutions. A

collapsing economy, punishing inflation, widening poverty, entrenched corruption, routine suppression of civilian rights and a simmering insurgency in Balochistan are realities the state seeks to hide from its own citizens. How can a state built on denial, coercion and military tolerance publications that expose its true and deeply troubling character?

N SADHASIVA REDDY,
Bengaluru

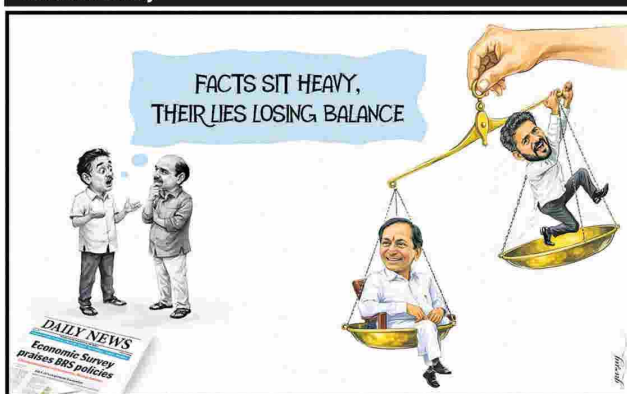
Power vacuum

Ajit Pawar's absence creates a significant power vacuum within the NCP faction and Mahayuthi. The coming weeks will determine if this tragedy leads to an earth-shattering realignment.

PR HEMA SAGAR,
Secunderabad

Write to us at letters@telanganatoday.com

Cartoon Today



India in the

hotspot

■ The Economist

The remarkable recovery of Modi

Sixteen months ago Narendra Modi looked chastened. Having just lost his majority in a national election, the chest-thumping Indian leader was forced to lean on regional parties.

■ BBC

Behind India's world-beating growth

As India's Finance Minister, Nirmala Sitharaman, gets ready to present the annual Union budget this Sunday, the country's economy, on the face of it, appears to be doing well.

■ The Washington Post

Signs of a new world order

At the energy summit in Goa, conversation turned to the emergent global order. "What is happening in the world today is not a gradual economic transition, it is a rupture," said Canada's energy minister, Tim Hodgson.

Frequent plane crashes and the aviation sector under scrutiny

In our country, air travel is considered a time-saving and elite mode of transport. Wealthy individuals, politicians, and actors frequently travel by air. However, in the past year, there have been so many reports of flight cancellations due to even minor weather disturbances, and so many deaths in plane crashes, that ordinary passengers are now hesitant to take this risk, even if they can afford the higher cost. In the latest accident, Maharashtra Deputy Chief Minister and senior leader Ajit Pawar tragically lost his life. Pawar was traveling with four others in a private charter plane, but the aircraft, which took off from Mumbai, crashed in Baramati. All five people, including Ajit Pawar, died. The jet was 16 years old and crashed during its second landing attempt.

A video shows that the plane lost control in mid-air and crashed in that state. Ajit Pawar was the nephew of NCP chief Sharad Pawar, and after a split, Ajit had formed his own NCP (Ajit) party. Ajit Pawar's funeral was held on Thursday with full rites. This raises the question: why are plane crashes happening so frequently? Recently, several prominent figures have perished in plane crashes. Each new death raises questions about India's rapidly developing aviation sector. The aviation sector in the country is being developed at a rapid pace. The nature of air travel has changed significantly. Large entrepreneurs and wealthy individuals now own their private charter planes. Besides the non-governmental aviation sector, many companies also provide charter planes and helicopters.

The demand for these services is very high among politicians. With several state assembly elections approaching, this demand will only increase. However, the way these accidents are occurring suggests a lack of proficiency among pilots in landing and taking off. Given the frequency of such incidents, the government needs to strengthen its monitoring system. Last year, in the Ahmedabad plane crash, all but one passenger were killed. Former Gujarat Chief Minister Vijay Rupani was also among the deceased. A few years ago, India's former Chief of Defence Staff, General Bipin Chandra Rawat, died in a helicopter crash. Politicians YS Rajasekhara Reddy, Madhavrao Scindia, Sanjay Gandhi, GMC Bhalogi, Dorjee Khandu, and Mohan Kumaramangalam also fell victim to similar air accidents. Ajit Pawar's death has sent shockwaves through political circles as well as the aviation sector. The general consensus is that greater caution must now be exercised in aircraft operations and pilot appointments. Meanwhile, some opposition politicians, most notably Mamata Banerjee, have hinted at the possibility of a political conspiracy in this accident, while Ajit Pawar's uncle Sharad Pawar has urged them not to politicize the incident. Indeed, it should not be politicized. The focus should now be on how to make charter planes and private flights safer in the country. During elections, politicians need air travel to reach rallies. Often, prominent leaders use private planes and helicopters for election campaigns. To prevent a recurrence of such accidents in the future, a thorough investigation of this air crash should be conducted, and any shortcomings identified. Rectifying these shortcomings and making future air travel flawless is the need of the hour.

Abhishek Vij

Supreme Court slams authorities over stray dog problem

The Supreme Court has repeatedly expressed concern over the increasing number of stray dogs on the streets and in markets. Now, the Supreme Court has reiterated this concern, expressing its displeasure and stating that state governments are making empty promises regarding stray dogs. It is also regrettable that due to the government's inaction, unfortunate news of dogs being killed is emerging. News has come from Kurunool in Telangana that hundreds of stray dogs were killed by lethal injection. In Telangana alone, the number of dogs killed in the year ending December 2025 has crossed 1200. Of course, some people have protested against the killing of dogs in the name of compassion for animals. The Supreme Court had previously stated that it receives more petitions to save dogs than for homeless people. The Supreme Court has repeatedly emphasized that every state should establish shelters for stray dogs and implement a vaccination and sterilization program as a campaign. The Supreme Court says that issuing orders to remove stray dogs from any institutional area is a violation of its warnings. The Supreme Court is extremely displeased with this situation. A long road lies ahead in this direction. Animal birth control facilities need to be increased, and the sterilization of stray dogs needs to be expedited. In addition, dog shelters need to be built. The critical question is also being raised: in this poor country, where shelters haven't been built for ordinary homeless people, will they be built for dogs first? The Supreme Court also stated that no encouraging efforts have been made to remove stray animals from highways. As a result, stray animals are seen roaming on the roads and causing accidents. Only Bihar has submitted an affidavit stating that it has 34 ABC (Animal Birth Control) centers where 20,648 dogs have been sterilized. Nowhere was it mentioned how many dogs the state is sheltering or sterilizing daily. The government lawyer said that significant progress would be made within three months. But what about the figures showing 166,000 dog bite incidents in Assam alone in 2024, and 20,900 incidents in January 2025? These figures are alarming.

PM Modi's reforms power India's leap to Global Indispensability



Tarun Chugh
National General Secretary of the Bharatiya Janata Party

In an era where the global economic compass often points toward uncertainty, India stands as a beacon of unwavering stability and visionary leadership. Under the transformative governance of Prime Minister Narendra Modi, the nation has not just navigated the post-pandemic recovery but has fundamentally re-engineered its economic DNA to thrive amidst global turbulence. The Economic Survey 2025-26 tells a compelling story of a nation that has moved from a "fragile" past to a future of "strategic indispensability," driven by a relentless pursuit of excellence and citizen-centric reforms. Prime Minister Narendra Modi's administration has unleashed a wave of reforms that are as compassionate in their social outreach as they are rigorous in their fiscal discipline. This reflects a multi-dimensional triumph of the Modi governance model, a model that has turned the 2020s into India's definitive decade.

The most striking achievement of the government is the absolute transformation of India's macroeconomic fundamentals. For decades, the Indian economy was characterized by challenges and sluggish growth. Today, the narrative has flipped. One of the most significant triumphs highlighted in the latest Economic Survey is the government's unwavering adherence to the fiscal consolidation roadmap. The Survey rightfully notes that the government's calibrated fiscal strategy, anchored in credible deficit reduction, resilient revenue mobilisation, and a decisive reorientation of spending toward capital formation, has strengthened macroeconomic stability and supported growth in the post-pandemic period. Importantly, this fiscal resilience reflects prudent fiscal policy choices and careful fiscal management. The government under the leadership of Hon'ble Prime Minister Narendra Modi remains committed to fiscal consolidation without compromising on growth. In 2021, amidst the peak of global uncertainty, the government set a target to bring down the fiscal deficit. Against the skepticism of global analysts, the Prime Minister has delivered, with the deficit projected at a lean 4.4% for the current fiscal year. This is not just a triumph of accounting; it is a triumph of credibility. By reducing the deficit from 9.2% in FY21, the government has signaled to the world that India is a safe harbour for capital. This discipline was the primary driver behind the historic credit rating upgrade by S&P, the first in nearly twenty years, moving India's outlook to 'Positive'. While the global economy is in a state of total instability, India's real GDP growth has remained anchored at a robust 7% or higher. This growth is qualitatively different from previous cycles; it is driven by record-breaking Capital Expenditure. The effective capex has risen from 2.7% (pre-pandemic average) to 3.9% of the GDP (post-pandemic). By prioritizing infrastructure like roads, railways, and digital networks over short-term populist subsidies, the government has ensured that today's spending creates tomorrow's earning potential.

The government has focused on constructing assets that function as the vital economic arteries for a rising nation. Since FY14, the national highway network has seen a remarkable 60% expansion, growing from 91,287 km to 1.46 lakh km by FY26. During the same period, operational high-speed corridors have expanded nearly tenfold to 5,364 km, effectively dismantling long-standing freight bottlenecks. This momen-

tum extends to the railways, where the pace of annual commissioning has more than doubled over the last ten years.

Maritime infrastructure has kept pace with this growth; cargo handling has climbed from 1,052 MMT to 1,602 MMT, with total capacity now reaching 2,771 MMT. Efficiency gains are equally evident at the docks, where the average turnaround time for container vessels has been slashed from 43.44 hours to 30.88 hours. However, the most profound shift is occurring in Inland Water Transport. Cargo movement via waterways has skyrocketed from 18 MMT in 2013-14 to 146 MMT in 2024-25, marking a permanent transition toward more affordable, sustainable, and streamlined logistics. Beyond the physical infrastructure of roads and rails, the Economic Survey emphasizes that urban success is built on a foundation of trust, predictability, and civic harmony. When regulations are transparent, services are dependable, and public spaces are treated with respect, economic growth becomes more inclusive and sustainable. The ultimate goal remains the creation of smart, functional cities that prioritize the "ease of living" for every citizen.

The hallmark of the Modi government is its shift from "Ruler's Raj" to a "Citizen's Raj". At the heart of the Prime Minister's vision is a fundamental transformation in the relationship between the state and the individual. The era of the "License-Permit Raj" has been decisively buried. The government's approach to "trust-based governance" is best exemplified by the Jan Vishwas Act and the subsequent amendments that have decriminalized several minor procedural lapses. The government has empowered small business owners and MSMEs to focus on innovation rather than compliance. The Task Force on Compliance Reduction has already implemented 76% of identified priority areas across States and Union Territories, simplifying land use, labour norms, and building approvals. This is the "Ease of Doing Business" in its most practical form, removing the friction that once held back Indian ingenuity. Similarly, the Goods and Services Tax (GST) has matured into a sophisticated engine of economic formalization. Recent reforms have addressed the "inverted duty structure" in labour-intensive sectors like textiles and fertilizers, making Indian exports more competitive. By rationalizing rates on goods of mass consumption, the government has effectively provided a permanent tax cut to the middle class, while simultaneously seeing record-high monthly tax collections.

If the 20th century was defined by physical infrastructure, the 21st is defined by digital public goods. India's Digital Public Infrastructure (DPI)—the "India Stack"—is now the gold standard for the world. Through the JAM (Jan Dhan-Aadhaar-Mobile) trinity, the Modi government has achieved in one decade what other nations took half a century to accomplish: near-universal financial inclusion. The Survey notes that Direct Benefit Transfer (DBT) has not only saved billions by eliminating "ghost beneficiaries" but has also provided a dignity-first safety net for the poor. During global shocks, this digital architecture allowed the government to provide instant relief without a single rupee leaking out of the system. India is no longer just a consumer of technology; it is a creator. India's 36th position on the UNCTAD Frontier Technology Readiness Index underscores its expanding leadership in generative AI and cybersecurity. Through an 'Entrepreneurial State' approach, characterized by proactive government intervention in shaping emerging technology markets, India is laying the institutional foundations for leadership in the Fourth Industrial Revolution.

The Prime Minister Modi has often emphasized that the farmer is the Annadata of the nation, and the latest economic data highlights a steady and resilient performance in the agriculture and allied sectors. The Digital Agriculture Mission



The most striking achievement of the government is the absolute transformation of India's macroeconomic fundamentals. For decades, the Indian economy was characterized by challenges and sluggish growth.

is revolutionizing the agricultural supply chain from production to consumption. By providing farmers with real-time data on soil health, weather, and market prices, the government is reducing the information asymmetry that once exploited the rural poor. The expansion of Farmer Producer Organizations (FPOs) has given smallholders the collective bargaining power of large corporations, ensuring they get a fair share of the value chain. Furthermore, the One Nation One Ration Card (ONORC) scheme is a masterpiece of social engineering. By ensuring that beneficiaries can access their foodgrains anywhere in India, the government has protected the most vulnerable, particularly migrant workers, from the shocks of inflation and local supply disruptions. This is citizen-friendly reform ensures that food security is treated as a fundamental human right.

In line with Prime Minister Narendra Modi's vision of Aatmanirbhar Bharat and Make in India, the nation's industrial sector has transitioned from traditional manufacturing toward high-tech capabilities, greater resilience, and deeper global integration. Key initiatives, such as the National Logistics Policy and the Unified Logistics Interface Platform (ULIP), are actively enhancing logistics efficiency and reducing transaction costs, thereby directly boosting the competitiveness of Indian manufacturing on the world stage. The Economic Survey highlights a robust revival in the sector, with manufacturing growth reaching 7.72% and 9.13% in the first and second quarters of FY 2025-26, respectively. This momentum is largely driven by the Production Linked Incentive (PLI) schemes and comprehensive structural reforms. As of September 2025, the PLI schemes have realized actual investments exceeding Rs2 lakh crore, generating over 1.5 lakh jobs in incremental production and creating employment opportunities for more than 12.60 lakh people. Reflecting the government's push for modernisation, medium- and high-technology activities now account for 46.3% of India's total manufacturing value added. The Manufacturing Purchasing Managers' Index (PMI) consistently remained in the expansionary zone, signalling broad-based confidence in the business environment. India's rank in the Global Innovation Index improved to 38 in 2025 from 66 in 2019.

Under the Prime Minister's leadership, "Make in India" has evolved into a quest for "Strategic Indispensability." The objective is no longer merely to manufacture for domestic consumption, but to establish India as a mandatory node in every global supply chain. By launching mission-mode platforms in high-tech sectors such as semiconductors and green energy, the government is future-proofing the economy. India is now positioned to become a global hub for Green Hydrogen, effectively aligning economic growth with the global

climate agenda. This strategy of "strategic indigenization" ensures that the nation is not dependent on volatile global markets for its energy or technological security. Parallel to these efforts, the PM Gati Shakti National Master Plan has dismantled traditional departmental silos. By integrating the planning of railways, roads, ports, and airports, the government has drastically reduced logistics costs. The sheer scale of the National Infrastructure Pipeline stands as a testament to the government's conviction that world-class infrastructure is the right of every Indian citizen, rather than a privilege reserved for those in metropolitan centers.

As highlighted in the Economic Survey 2025-26, India's growth strategy is anchored in strengthening human capital, with measurable gains in both education and health outcomes.

Economic growth is hollow without human development, and the Modi governments' "Sabka Saath, Sabka Vikas" serves as the guiding light for social reforms. The world's largest health insurance scheme, Ayushman Bharat, has provided a safety net to crores of people. By removing the fear of "catastrophic health expenditure," the government has allowed millions of families to climb out of poverty and stay out of it. Health indicators show parallel structural progress. Infant mortality has declined from 40 in 2013 to 25 in 2023, reflecting sustained improvements in public health delivery. A nationwide primary healthcare network is now anchored by 1.82 lakh Ayushman Arogya Mandirs, while 42.78 crore Ayushman cards and over 10.98 crore hospital admissions demonstrate large-scale protection for families. Disease control efforts continue to strengthen, with tuberculosis incidence falling 21% since 2015. In education, the new National Education Policy (NEP) is transforming India from a nation of rote-learners to a nation of innovators. By emphasizing vocational training and digital literacy from a young age, the government is preparing the "demographic dividend" for the jobs of the future. While the rest of the world struggled with double-digit inflation and 'cost-of-living' crises, India maintained a remarkably stable price environment. Amid a global landscape in which many emerging markets faltered, India stood out for its effective management of inflation without compromising growth. The Government's proactive supply-side management has driven inflation down to historic lows, with the Survey highlighting India's success in maintaining macroeconomic stability and protecting the purchasing power of the common citizen. Notably, the Economic Survey 2025-26 reports the sharpest reduction in headline inflation (1.8%) among major economies in 2025. Between April and December 2025, India, recorded an inflation rate of 1.7%, largely driven by a contraction in the prices of major food commodities such as vegetables and pulses. As India moves forward under the capable and visionary leadership of Prime Minister Modi, our country has transitioned into what the Survey calls an "Entrepreneurial State"—a government that does not wait for certainty but acts to create it. The story of the Indian economy under Prime Minister Narendra Modi is one of courage, clarity, and compassion. It is the story of a nation that refused to be defined by its challenges and instead chose to be defined by its potential. From the record-breaking heights of the financial markets to the quiet dignity of a rural household receiving a gas connection or a digital payment, the reforms are visible everywhere. India is not just "pushing the growth frontier"; it is redefining what is possible for a developing nation in the 21st century. The foundation laid in the last decade serves as a launchpad, and with a stable government and a clear vision steering towards achieving the vision of Viksit Bharat by 2047.

PRAGATI@50: Why delivery, not intent, defines governance



T.K. Ramachandran
Ex Secretary, Ministry of Ports
Shipping and Waterways

Two path-breaking interventions by the Government have had a great impact on planning, execution and monitoring of large projects - PM Gati Shakti and PRAGATI. We look at the latter in this piece.

The 50th high-level review under the PRAGATI (Pro-Active Governance and Timely Implementation) framework marks a fundamental shift in how the Indian State approaches governance, moving from intent to delivery, procedural compliance to outcomes, and fragmented authority to coordinated, timely execution. PRAGATI is thus not merely an administrative innovation; it represents a deliberate re-engineering of governance architecture. How did this model of governance deliver results when

others have failed?

The Need for PRAGATI
Delays in public projects have become almost axiomatic. Yet they rarely stem from a lack of policy clarity or financial sanction. They arise because governance systems are fragmented. Ministries function vertically; States and the Centre act sequentially; and disputes circulate without a forum empowered to impose resolution. Accountability diffuses even as activity multiplies. The core problem is weak coordination and silo-based review mechanisms. As a result, the broader objective of project delivery is often lost. Many projects remained stalled for years due to land issues, environmental or forest clearances, regulatory approvals, contractual disputes, or inter-State coordination challenges. In a multi-ministry and multi-State political economy where each entity lords over the domain it controls, it is difficult for anyone to convince the other. When several States and Ministries have to contribute to project completion the old approach of having meetings, discussions, field visits, constituting committees, and endless correspondence is ineffective. This was an approach in which discussion was mistaken

for decision, activity for work, movement for progress and mere intent for achievement.

Enter PRAGATI
PRAGATI addresses these persistent structural failures by redesigning how decisions are taken, synchronised, and enforced. Functioning as a system integrator, it brings decision-makers across Ministries, States, and districts onto a single institutional and digital platform. It collapses delays caused by file movement, jurisdictional ambiguity, and inter-departmental correspondence. Most importantly, it restores a bird's-eye view of execution, allowing leadership to identify where the system is constrained rather than where a file is pending.

The Hon'ble Prime Minister's role in chairing PRAGATI reviews is central to its effectiveness. His direct engagement sends an unambiguous signal that delivery is a national priority and that execution failures will receive attention at the highest level. It facilitates decisive action and transforms review into a binding framework for results. Decisions taken during these reviews are final, time-bound, and digitally recorded, ensuring accountability is clear and enforceable.

Technology acts as a critical enabler. Real-time data, geo-spatial visualisation, and live interaction with field authorities eliminate information asymmetry between stakeholders and ensure that decision-making is grounded in evidence. Importantly, technology strengthens administrative judgment rather than replacing it, reinforcing leadership responsibility within the system.

What distinguishes PRAGATI from earlier review mechanisms is its insistence on closure. Issues remain live until resolved and are continuously tracked by the Cabinet Secretariat and the Prime Minister's Office. Explanations no longer substitute outcomes. Over time, this discipline has reshaped administrative behaviour, encouraging Ministries and States to anticipate and resolve problems before escalation becomes necessary.

The Results

The outcomes are clearly visible and measurable. Projects worth over Rs85 lakh crore have seen accelerated progress. In recent years, ten projects of the Ministry of Ports, Shipping and Waterways (MoPSW) were reviewed under PRAGATI, enabling early resolution of bottlenecks and faster execution. I will use two projects

as examples.

The National Maritime Heritage Complex at Lothal is a massive project involving many Ministries at the Centre like Culture, Defence, External Affairs, Railways and Highways as well as the Government of Gujarat. Also, since several coastal State pavilions are to be set up, the concerned States are also part of the project. Bringing the NMHC project onto the PRAGATI agenda last year immediately spurred action at multiple levels. Usually, the agenda is notified a few months before it is taken up for review by the Hon'ble Prime Minister, providing an opportunity for different stakeholders to address issues with a sense of urgency. The result is that most issues that can be sorted at an official/ministerial level are already sorted out and only intractable residual items requiring guidance or direction are taken up during the actual review. Similarly, the Jal Marg Vikas project, which is being implemented on NW-1 that passes through Uttar Pradesh, Bihar, Jharkhand, and West Bengal was reviewed under PRAGATI twice. This project is now at completion stage with most pending issues resolved.

PRAGATI underscores a critical truth: public value is created not

merely by announcing schemes, but by ensuring that sanctioned investments translate into outcomes. Stalled projects have progressed not because policies were rewritten, but because execution pathways were simplified and accountability enforced. Equally significant is PRAGATI's contribution to cooperative federalism. By placing Chief Secretaries and Union Secretaries on a single real-time platform, it replaces fragmented responsibility with shared ownership of results.

PRAGATI@50 stands as evidence that governance outcomes are a function of institutional design. Dismantling silos, restoring a bird's-eye view of execution, and prioritising closure, PRAGATI demonstrates that effective governance is not just about doing more, but also about doing what is already sanctioned, faster, better, and together. Timely execution accelerates access to services, boosts the economy, reduces regional disparities, and strengthens public confidence in the State's capacity to govern.

PRAGATI is both a record of leadership-driven delivery and a blueprint for governing complexity. The Global attention and applause that it is receiving are proof of this.

Why the GRAM-G act is the successor India needed



Sheena Sandhu
A retired civil servant

For nearly two decades, the Mahatma Gandhi National Rural Employment Guarantee Act (MGNREGA) served as the primary safety net for rural India. It was a landmark in legislative history—the first time a “right to work” was codified into law. However, as the 2026 Economic Survey recently noted, the overall architecture of MGNREGA had reached its structural limits. The introduction of the Viksit Bharat – Guarantee for Rozgar and Aajeevika Mission (Gramin) Act, or VB-GRAM-G Act, which replaced MGNREGA in late 2025, is not merely a rebranding exercise. It represents a fundamental shift from subsistence-level labour to sustainable wealth creation.

A key criticism of the earlier system was its emphasis on short-term, low-productivity work, often dismissed as “digging pits only to refill them.” The GRAM-G Act pivots decisively towards the creation of durable, high-value assets.



Under the new framework, labour is no longer an end in itself but a means to build the Viksit Bharat National Rural Infrastructure Stack. Projects are prioritised for their long-term economic returns, including cold storage facilities, rural micro-grids, and climate-resilient roads. This ensures that public spending on wages simultaneously strengthens the foundations of a modern rural economy.

Another significant upgrade is the increase in guaranteed employment days from 100 to 125 per rural household. While critics argue that average employment under the previous regime rarely exceeded 50 days, the GRAM-G Act addresses this gap through a new “Normative Funding” model. By shifting from a purely demand-driven system to a predictable, centrally sponsored framework with a 60:40 Centre-State funding split, the Act aims to ensure timely fund availability and reduce chronic wage delays.

Crucially, the GRAM-G Act reimagines the rural worker as a

potential micro-entrepreneur rather than a permanent wage labourer. It introduces a clear skill-based progression—from entry-level Sahayak to skilled Daksh and expert Pravin workers. By integrating vocational training, certification, and direct access to micro-credit, the Act creates pathways for workers to graduate into self-owned enterprises, transforming community assets into private livelihoods.

Governance reforms form the backbone of this transition. Every asset created is geo-tagged and monitored through public dashboards, biometric verification has replaced paper-based records, and weekly wage payments are mandated through Aadhaar-based systems to ensure faster and leak-proof transfers.

Finally, the Act balances employment generation with agricultural realities by introducing a 60-day “no-work” period during peak sowing and harvesting seasons. This ensures labour availability for farming while preserving the full 125-day entitlement across the year. Taken together, the GRAM-G Act represents a modern social contract—one that shifts rural policy from welfare to investment. It does not merely sustain rural India; it equips it to lead. The old framework ensured survival. The new one builds capacity, ownership, and a genuine stake in India's vision of Viksit Bharat by 2047.

The quiet transformation of India's small towns

India's transformation is often narrated through the skylines of its megacities—Delhi, Mumbai, Bengaluru, and Hyderabad. Yet, beyond these urban giants, a quieter but equally significant change is unfolding in small towns and semi-urban regions. These towns, once defined by limited opportunities and outward migration, are increasingly becoming centers of aspiration, enterprise, and social mobility.

One of the biggest drivers of this shift is improved connectivity. Over the past decade, expansion of highways, railway modernization, and affordable air routes under regional connectivity schemes have reduced the distance—both literal and psychological—between small towns and major markets. Goods move faster, people travel more frequently, and ideas circulate more freely. This has allowed local businesses to grow beyond their immediate geography.

Digital penetration has played an even more decisive role. Affordable smartphones and low-cost data have connected



millions to the internet, enabling access to education, banking, healthcare, and government services. A shopkeeper in a tier-three town can now source products online, accept digital payments, and advertise through social media. Students prepare for competitive exams using online platforms, while farmers access real-time weather updates and market prices. Education infrastructure has also improved steadily. While challenges remain, many small towns now host universities, technical institutes, and private colleges. This has reduced the need for students to migrate early in life and has contributed to the growth of local economies. Coaching centers, hostels, libraries, and cafes have emerged, creating new employment avenues.

Healthcare access, though uneven, has similarly

expanded. District hospitals are better equipped than before, telemedicine bridges gaps in specialist care, and private clinics have multiplied. During health crises, the importance of localized healthcare systems has become evident, reinforcing the need for sustained investment in these areas.

Culturally, small towns are witnessing a blend of tradition and modernity. While local festivals, languages, and customs remain strong, exposure to global media has reshaped aspirations and lifestyles. Young people increasingly seek careers in entrepreneurship, creative fields, and technology, challenging the notion that success requires relocation to big cities.

Economically, small towns benefit from lower costs of living and operations. Startups and small manufacturing units are finding these regions attractive due to affordable land, local labour availability, and government incentives. This decentralization of economic activity reduces pressure on megacities and promotes more balanced development.

Empowerment of the middle class under the NDA Govt

India's economic policies have witnessed a significant shift over the past decade. The NDA government has moved away from the traditional subsidy-centric approach of a welfare state, adopting a strategy focused on directly empowering the middle class. Through income tax relief, structural reforms, infrastructure investment, and social security schemes, the government has attempted to boost both consumption and savings. The question is not whether relief has been provided, but whether this shift is proving to be a restructuring towards the long-term economic strengthening of the middle class.

Government data indicates that in the last 11 years, approximately 250 million people have moved out of poverty and into the middle class. This emerging “neo-middle class” is not merely a sign of income growth, but also evidence of a transformation in the structure of the country's economy. While India's growth was previously primarily dependent on investment and exports, domestic consumption is now becoming a major engine. The increasing purchasing power of the middle class has given new impetus to sectors such as real estate, automobiles, education, and healthcare.

The government has made infrastructure investment the cornerstone of this transformation. The expansion of the metro rail network from 5 cities to 23 cities is not just an improvement



in urban transportation, but also a means of increasing productivity. Improved connectivity has reduced travel time and fuel costs, indirectly increasing the real income of the urban working class. The expansion of digital infrastructure has made government services faster and more transparent, reinforcing the “ease of living” agenda.

Tax reforms have been the most direct part of this strategy. Raising the zero-tax income limit to Rs12 lakh and restructuring the tax slabs to account for inflation reflects the government's approach of considering taxpayers as partners in development, not merely as a source of revenue. This has put more disposable income in the hands of the middle class, boosting consumption. While critics argue that this will increase fiscal pressure, the government maintains that

increased consumption will ultimately broaden the tax base. The GST 2.0 reforms have worked towards reducing costs by simplifying the indirect tax system. The removal of higher tax slabs has made everyday goods and consumer products more affordable. Exempting insurance premiums from GST makes health and life protection more accessible. This indicates that the government is using the tax system not merely as a revenue collection tool, but also as an instrument of social policy. The use of the Price Stabilization Fund to control inflation reflects a proactive market intervention model. Through direct procurement from farmers and subsidised sales to consumers, the government has attempted to mitigate food inflation shocks. While the long-term solution lies in increasing agricultural productivity, this strategy has been effective in safeguarding middle-class household budgets in the short term.

On the financial security front, the expansion of small savings schemes strengthens the social contract where the state provides secure investment options. Schemes like PPF, SCSS, and Sukanya Samriddhi, with their guaranteed returns and tax benefits, have become reliable instruments for the middle class. This model promotes stable wealth creation compared to risky market investments.

In housing policy, through PMAY-U 2.0, the government has made homeownership a crucial

pillar of social security for the middle class. The significant increase in budget allocation demonstrates that affordable housing is being viewed not just as a welfare scheme, but as a catalyst for economic growth. Job creation in the construction sector and increased domestic demand are direct benefits. In the health sector, the expansion of Ayushman Bharat creates a comprehensive social safety net. Covering over 500 million people, this scheme is not only for the poor but also a means of reducing the financial burden on the entire healthcare system. Providing universal coverage to senior citizens reflects the state's growing social responsibility.

The significant reduction in medicine prices through the Jan Aushadhi Yojana has considerably controlled healthcare expenses for the middle class. The availability of affordable medicines has also increased price competition in the private pharmaceutical market, which is beneficial for consumers. Overall, the NDA government's policies can be seen as an attempt to transform the middle class from subsidy-dependent consumers into economically empowered participants. This shift represents a move beyond mere relief towards structural empowerment. While questions regarding fiscal balance, job creation, and long-term productivity still remain, there is no doubt that the policies of the past decade have redefined the role and expectations of India's middle class.

The Tribune

ESTABLISHED IN 1881

Digital addiction

Age-based access to social media makes sense

THE Economic Survey's push for age-based access to social media is a welcome intervention. For years, digital expansion has been celebrated as an unqualified good — democratising access, bridging gaps and modernising education. The Survey tempers the optimism with an uncomfortable truth: unchecked digital exposure is fast becoming a public health concern. Identifying digital addiction as a problem affecting mental health, academic performance and productivity, the Survey moves the debate towards evidence-based policy. Its recommendations — age-appropriate access limits, platform accountability for age verification, simpler devices for children and reduced dependence on online classes — reflect a growing global consensus that children need protection from predatory digital designs optimised for attention, not well-being.

Equally important is the emphasis on collective responsibility. By calling for platform-level safeguards and family data plans that distinguish educational from recreational use, the Survey acknowledges what many parents already know: individual control is no match for industrial-scale efforts.

International examples strengthen the case. From Australia's under-16 ban to France's move against under-15 access, governments are increasingly willing to draw hard boundaries. India, with its rapid smartphone penetration and a huge population of youngsters, cannot afford to lag behind. Yet the Survey wisely avoids a one-size-fits-all ban, instead advocating a layered approach involving governments, educational institutions, civil society and families. The real challenge, of course, will be implementation. Age verification, enforcement and equity concerns — especially for poor families — will test policymakers. Still, the Survey has done well to outline a comprehensive plan on digital restraint. In a hyper-connected age, protecting young minds is a very progressive policy.

Easing drug trials

Cutting red tape must not risk safety

REGULATORY relaxation carries inherent risks, especially in a sector as sensitive as drug development, where public health, scientific integrity and commercial interests intersect. The Union Health Ministry's amendments to the New Drugs and Clinical Trials (NDCT) Rules, 2019 — easing trial norms and removing the requirement of test licences for several research activities — must therefore be assessed as much for what they loosen as for what they promise to deliver.

The intent behind the reforms is clear. By replacing prior approvals with a system of intimation for low-risk research, waiving permissions for certain bioequivalence and bioequivalence studies and shortening approval timelines where licences are still required, the government aims to reduce regulatory friction and accelerate pharmaceutical innovation. For an industry long hampered by procedural delays that added little to safety, these changes could shorten development cycles and lower costs, particularly for generics and early-stage research. Yet faster approvals must not translate into weaker scrutiny or reduced accountability. India's reputation as a reliable supplier of affordable medicines rests on the credibility of its regulatory oversight. Any perception that safeguards are being diluted in the name of ease of doing business risks eroding public trust and inviting global scepticism about the robustness of India's drug approval process.

The shift from a permission-based system to post-intimation places a heavier burden on regulatory vigilance. It demands stronger monitoring mechanisms, transparent reporting and enhanced institutional capacity at the Central Drugs Standard Control Organisation. Without effective audits, real-time data scrutiny and meaningful penalties for violations, regulatory relaxation could open gaps rather than improve efficiency. These reforms, therefore, represent a critical test of balance. If supported by rigorous oversight and accountability frameworks, they can encourage innovation while protecting patient safety. If not, they risk substituting speed for science.

ON THIS DAY...100 YEARS AGO

The Tribune.

LAHORE, SUNDAY, JANUARY 31, 1926

The problem of unemployment

THE problem of unemployment, which formed the subject of an interesting debate in the Legislative Assembly on Thursday, is one of the most vexed questions that face the country at the present moment. This question is by no means peculiar to India, but here it is aggravated by several factors which do not exist in Western countries. For one thing, the Indian cannot find employment anywhere except in his own country. Not to say anything about foreign countries, even British colonies and dominions have closed their doors in the face of Indian immigrants. Indians, must, therefore, find employment in their own country, if at all. Secondly, in India itself, any higher posts are filled by non-Indians and thus the field of employment for the educated classes is further narrowed down. These difficulties in the way of our young men finding suitable employment are serious enough, but they are by no means the most important. The most potent cause of unemployment amongst the middle classes is the economic dependence of India on other countries. India provides work and food for millions of workmen in England, America, Japan, Germany and other countries by importing every year manufactured articles worth crores of rupees. It must, therefore, be clear to the meanest intelligence that so long as India's import bill continues to be as heavy as it is at present, it is impossible to materially reduce unemployment in this country, because India cannot find employment for her own population as well as for millions of workmen living in other countries.

The fact-fiction brew of Amitav Ghosh

His latest book, *Ghost-Eye*, is a story of love without limits, without pretence

THE GREAT GAME

JYOTI MALHOTRA

THE brilliant Amitav Ghosh is on a book tour of *Ghost-Eye* in the motherland these days, and no, he's not coming anywhere close to Punjab, Haryana, Himachal Pradesh or Jammu & Kashmir, because it seems that despite the proliferation of literature festivals in the region — including two in Chandigarh, both of which are largely devoted to who-did-you-see-there, rather than have-you-read-this-book — there isn't much of a reading market in these parts. (Even the book people know.)

So here's the thing about Amitav — he is probably amongst the most unsocial people you will meet. He's gruff, even growly. At an interview for a previous book, he refused to talk about the book. Decades ago, I carted a few copies of a title published only in South Asia his former publisher, Ravi Dayal, wanted to send him, from New Delhi to New York — after many emails we met at a coffee shop and I thought, aha, here's my chance at discovering the man behind the genius. The man walked in, took the books from me, said thank you with half an accompanying smile, turned on his heel and left. I think I paid several dollars too many for a coffee that tasted both tepid and tasteless.

Then you begin to read. You must start with *The Glass Palace*, a story that will remain with you till the dying of the light, about India and Burma, an arc of fire and torment that connects the trials of the grandest King, Thibaw, ousted

CAULDRON: In *Ghost-Eye*, Amitav seeks to unite the universe, pulling in past lives, both human & non-human. PH

by the British from his beloved Mandalay and brought to Ratnagiri off the coast of Maharashtra, where he died a lonely death in 1916 — remember, the British took Bahadur Shah Zafar to Rangoon after the failed Mutiny of 1857, where he lived till he died in 1862. We tend to forget the intimate connection between India and its eastern neighbour, Myanmar, these days, even when times are falling apart.

Back in 2000 when Amitav wrote *The Glass Palace* and retrieved the drama of history from the history textbooks, you saw with blinding clarity how the brutal annihilation of two dynasties was undertaken by the British when both India and Burma were part of the Raj; that until 1935, when Burma was spun away into an independent country, Indian Railways connected Calcutta-Kolkata with Rangoon-Yangon and that people travelled, worked, married, had children without fear or favour of boundary, passport or

When you read the master this weekend, it is time to redeem the connection between books, reading, education & learning.

visa, just like anywhere else in the enormous Indian subcontinent that spanned the Himalayas and the Indian Ocean; that a significant part of the Second World War was fought in Burma and Malaya, parts of what is now called South-East Asia, not just in the theatres of Europe and Africa; and that Indian soldiers fought everywhere, in the East and in the West, as many as 2.5 million of them, of which it is officially said, 87,000 died — fighting for a country or a coalition of nations not even their own.

That's the thing about Amitav Ghosh. He mixes fact and fiction in a witches' brew and makes it his own. So when UK Prime Minister Keir Starmer went to China earlier this week and you saw photos of him shaking hands with Xi Jinping, you bet your head raced back to Amitav's *This* trilogy. There's love, of course, in the most uncertain places, as the grand drama of people's lives unfold across continents, peppered with war, trade and that ultimate fix, opium. River of Smoke explained why several Chinese historians believe that 1839 inaugurated the "century of humiliation", beginning with the Opium Wars and ending only in 1949 when Mao led his bunch of bedraggled stormtroopers into the heart of the Middle Kingdom, Beijing.

Understand, then, the connection between the opium factory in Ghazipur on the banks of the Ganga in the Poorvanchal and the indentured migration of Indians across the world, a story

that begins with *Sea of Poppies*. Opium, its lucrative trade and its role in both building empire and crushing nationalism are the stuff of both *River of Smoke* and *Flood of Fire*.

The Shadow Lines is probably out of print these days — although, at the rate at which Bangladesh's politics is changing today, you might want to retrace your steps to the local library. Fast forward to *Gun Island*, a fantastical tale about spiders, migration and environmental disasters, backing and forth between Venice, Kolkata and the Sundarban. The story about Manasa Devi, the goddess of snakes, first unfolds here. *The Hungry Tide* seemed too much of a lecture, scolding us for not doing enough about the misfortune of climate change. *Ghost-Eye* picks up where *Gun Island* left off. Even the names of several characters are the same. The goddess, Manasa Devi, remains at the core of the story. As fact collides with fiction, Amitav seeks to unite the universe, pulling in past lives, both human and non-human, and throwing everything into the cauldron of science and mythology. From this churning of the ocean of stories, the *Kathasaritsagara*, emerges *Ghost-Eye*, a story of love without limits, without pretence.

On the edge of Chandigarh, in Panchkula, is located the temple of Manasa Devi, revered as a form of Shakti, the female goddess. It's not clear if she is the same as Manasa Devi, the goddess of snakes at the heart of *Ghost-Eye*, but if she is, it may be time to relook at Ghosh's prescription of life, where he approvingly quotes Carl Jung, which is, that "there are no coincidences, only synchronicity." What this means is that when you read the master this weekend, it is not just meant to be, it is also time to redeem the connection between books, reading, education and learning.

It's also when you take the leap of faith towards yourself. It's time.

“

In order to see the world in a different way, we need different kinds of stories. — Amitav Ghosh

”

A big-hearted scout in the wilderness

COL MANEESH MISHRA

THE year was 2006, and the hills of Tamenglong in Manipur did not care for our maps or our fatigue; they were a vertical labyrinth of bamboo and ancient rain. The air was a soup of humid rot and constant, prickling awareness of an unseen enemy. Twelve days into a 14-day patrol, our uniform had turned into a second, salt-crusted skin. Along the Barak river, the physical world had narrowed to the rhythmic thud of boots and the swaying rucksack of the man in front.

As a young Captain, I was in that volatile stage where energy still masked the agony of the trail. Major Debnath watched from the middle of the file with a seasoned eye; my face flushing with determination to never show weakness, even as the straps of the heavy rucksack bit into my shoulders like dull saws. I was fuelled only by the pure desire to be worthy of the man I led.

In the vanguard was Naik Lakshman, a scout whose movements were so synchronised with the jungle that he seemed to displace no air. He sensed my flagging pace through the change in my breathing. Lakshman drifted back, merging with the shadows until he was beside me, his voice a low, rough whisper: "Stuoh, bog thoda bhari lag raha hai," he said, his hand already reaching for the frame. "Leo, mein le leta hoon: apni aage dekho." I stiffened, my pride flaring. I looked at Lakshman, a man already carrying nearly 30 kg, a man who had stood sentry while I slept, and who was now offering to double his burden simply because he cared for the officer he protected. It was a display of a heart so big it made the vast wilderness seem small.

"Nahin, Lakshman. Teri kaam aage dekhna hai. Tu urahan dhyan rakhi." My words were unnecessarily sharp. He didn't flinch. He gave a disciplined nod and melted back to the front, his craft so flawless that within seconds he was again the invisible shield between the patrol and the valley's hidden threats. That evening, as the mist crawled up from the Barak like a cold grey ghost, Major Debnath shared a mug of tea with me near a hidden ledge. "They have a way of making your own exhaustion feel like a sin, don't they?" he said, eyes fixed on the ridge where Lakshman was once again on watch. "It's a peculiar blessing, being led by the very men you think you're leading."

Now, 20 years later, in a super-connected world of glowing glass rectangles, I often think back to that mud-slicked trail. Today, where we 'follow' strangers and 'link' with people we don't like, I wonder if we have traded that tactile, life-and-death sincerity for something thinner.

Did we leave the best version of our humanity behind in those jungles, where a man would offer to carry your weight simply because you were walking the same path, or have we just forgotten how to see the 'bag' the person next to us is carrying?

THOUGHT FOR THE DAY

LETTERS TO THE EDITOR

Voters' loyalty not permanent

Apocryphal of 'Secular parties and their Muslim vote bank'; the word 'secular' lost its meaning a long time ago, although it is still a part of the Preamble to the Constitution. In the times of Jawaharlal Nehru and Indira Gandhi, the Muslim voters trusted the Congress, hence it was tagged a secular party. Slowly, this label was shared by regional parties like Samajwadi Party, RJD, BSP, JDU and most recently Prashant Kishor's Jan Suraj Party. No political party can take for granted the loyalty of any community towards it forever. The Shiromani Akali Dal used to consider Sikh voters as its permanent vote bank, now the same party is finding itself in the wilderness.

RAVINDER KUMAR JAIN, LUDHIANA

Unclean water a systemic failure

Refer to 'How water and waste are becoming inseparable'; the growing convergence of sewage, waste and drinking water across Indian cities has become a recurring phenomenon. Such failures are not isolated mishaps but symptoms of deeper anomalies in urban planning and public health governance. When contamination becomes routine, the issue shifts from individual behaviour to a systemic fault. Appeals to civic sense or cultural memory, though invaluable, cannot substitute for reliable public systems. Clean water is not symbolism; it is a basic social requirement. Ensuring its supply requires sustained public investment, technically competent institutions and accountability in execution.

MANU KANT, CHANDIGARH

Caste is only a political tool

Refer to 'Tackling caste bias'; discrimination cannot be tackled unless we take the bull by the horn. The canard of casteism is frequently spread by vested interests. Whatever comes out of the 2026 regulations of the UGC and the SC intervention, the dividing lines between castes and communities already stand more sharpened. By spreading hatred, anger, intolerance and fear, divisive politics is ruining the future of the youth. Caste-based quota is not reaching the marginalised and the underprivileged, everybody is only scratching the surface. The have-nots continue to suffer in silence.

HIRA SHARMA, BY MAIL

Focus on local manufacturing

Refer to 'Cautious optimism'; the Economic Survey reflects that the nation's economy is growing. The government is on a path of fiscal consolidation with fiscal deficit reducing from 4.8% to 4.4%. Foreign exchange reserves are in a comfortable position. Inflation has fallen; banking sector is performing much better with NPAs dropping to 2.2%. The Survey, however, highlights that there is a strong need for strategic resilience and indispensability. We can't overlook the fact that there would be supply chain disruptions in the midst of heightened US tariffs. There is a need to hunt for more markets, along with focusing on local manufacturing and raising domestic consumption. Localised supply chains are less vulnerable to global disruptions.

KR BHARTI, SHIMLA

Mutual gains in politics, religion

The Prime Minister's upcoming visit to Dera Sachkhand Ballan in Jalandhar appears to be a political move. The dera has a strong presence in the Doaba region, which has a sizeable population of Scheduled Castes. His visit can be a game-changer in the 2027 Punjab Assembly elections. Therefore, this step can be seen as an attempt to strengthen the BJP's position in Punjab where it has a lesser hold as compared to other political parties. Respecting religious feelings is the responsibility of every individual, but mutual dependence and a healthy mix of religion and politics is dangerous for society.

RAMAN SIDHU, JALANDHAR

Compassion in everyday life

Refer to the Middle, 'Care for all creatures, great and small'; it was a touching narrative of a child's sublime feelings and innocence for the helpless hatchlings. In my house too, my daughter-in-law protected two chicks. After the care they received, the defenceless creatures were able to fly after a few days. Leaving them unattended could have been an alternative, but compassion must find expression in our everyday actions. As human beings, we need to be more empathetic.

RAMESH GUPTA, NARWANA

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@tribuneindia.com

Urban India's crisis beneath the concrete



AJAY K MEHRA
SENIOR FELLOW, CENTRE FOR
MULTILEVEL FEDERATION

ON January 16, Noida witnessed an avoidable tragedy — the car of a young executive, Yuvraj Mehta, returning home from work at night plunged into a construction pit adjacent to an unlit road. Though a crowd gathered at the spot, including rescue agencies, he could not be saved. Two weeks earlier, the historic 15th-century city of Indore, rated as the cleanest in India for several years, was supplied contaminated water. Several citizens died of the toxic aftereffects.

These mishaps highlight some serious challenges facing India's expanding urban areas. The two instances show that cities, whether contemporary or going back in history, lack such basics as sanitation,

potable water and face structural and planning challenges. The death of Yuvraj shows the lack of a quick response to a crisis, in which a life could not be saved. The Indore incident shows lack of supply of necessities like clean water.

The country's urban policy must respond to the needs of the millennium arising from rapid and vertical expansion, increased automobile traffic, and so on. The urban population has risen from 11% in 1947 to roughly 35-36% in 2021-2025. The approximately 1.34 to 1.5% annual rate of growth adds to the challenges in our preparedness. Arranging civic facilities for such a large growing population requires planning and preparedness that the country is obviously lacking.

The 'urban' phenomenon of India has a long past. Remembering our ancient, glorious cities, we have been changing their names, like Allahabad to Prayagrah. There is talk of renaming Delhi as Indraprastha. But these are futile exercises. The urbanisation process focusses on land, which engenders politics and corruption. The builder-politi-



SMART CITY: Restoration work of water pipelines after the water contamination tragedy in Indore, M

cian nexus makes cities weak, resulting in suffering for the dwellers.

Jawaharlal Nehru's observation in his autobiography on serving two years (1923-25) as chairman of the Allahabad municipality is insightful. He has written: 'But on the one side, there was the Government machine; on the other, the apathy of the members of the municipality as well as the public. The whole steel-frame of municipal administration, as erected by Government, prevented radical growth or innovation. The financial poli-

The area in Noida where Yuvraj met his death is not a posh one. Since no "important" people live there, the local authorities are lackadaisical.

cy was such that the municipality was always dependent on the Government. Most radical schemes of taxation or social development were not permissible under the existing municipal laws. Even such schemes as were legally permissible had to be sanctioned by Government, and only the optimists, with a long stretch of years before them, could confidently ask for and await this sanction.'

The next page talks of how politics played a role in the allocation of funds to the privileged civil lines (the wide area with

bungalows and cottages, each with a fairly extensive compound or garden) and 'the densely crowded city proper'; the former paid less and got more and the latter to the contrary. He sums up: 'Nearly all the Big Noises and Little Noises live in the Civil Lines.' He regrets that he was not allowed to balance the allocation.

A look at 'India's Urban' shows that the situation continues to be what it was then. The Bhagirathpura locality in Indore that got contaminated water supply is populated primarily by poor people. It shows how urban development is planned. Similarly, the area in Noida where Yuvraj met his death is not a posh one and is under development. Since no 'important' people live there, the local authorities have not provided it with proper fencing and light for the safety of the passersby.

Rajiv Gandhi formed the National Commission on Urbanisation in 1985, but it wound up without leaving much impact. The mega-cities scheme of 1993 is an ambitious one. But it has not kept pace with the needs of rapid urbanisation. Under the Jawaharlal

Nehru Urban Renewal Mission, 2005, some schemes of urban upgradation were initiated. But small towns and cities that are unable to generate independent revenues and lack even the basic services have not been allocated adequate funds. In 2015, the Atal Mission for Rejuvenation and Urban Transformation (AMRUT) and the Smart Cities Mission (SCM) were set up to look into the basic needs of the cities, but with little results.

Selectiveness built into these schemes deprived them of a comprehensive approach to city-building that India needs. The Central government claims that Rs 1.64 lakh crore has been invested in the smart cities project and 90% of the project is complete. But the Noida and Indore episodes show that India is yet to meet the basic needs of the urban population. Fancy slogans such as 'smart city' lead to the allocation of enormous resources to a few cities without meeting the basic needs of these cities. India's massive urban expansion needs effective plans for public transport, education and medical services.

GPU gap in India's AI dream



NAVANWITA BORA SACHDEV
TECH ANALYST, THE TECH PANDA

INDIA has entered its AI awakening, driven by talent, investment and a fast-modernising digital population. But the country's ambitions face an undeniable bottleneck: the near-total reliance on foreign-made Graphics Processing Units (GPUs) and accelerators. India's AI momentum is real, but it is also fragile. The country seems to be entering a rare convergence of talent, capital and policy intent. AI-first startups are emerging fast, global investors are paying attention and the government is also moving fast on deep-tech infrastructure. As per a paper released by Bessemer, the Indian IT sector is projected to reach \$400 billion by 2030, with AI playing a key role in this growth.

However, the foundations of the AI boom rest on a narrow and vulnerable layer: the access to computer or hardware resources that make AI models work. For decades, India's tech dominance has come from scale through millions of engineers, global outsourcing contracts and cost efficiency. AI is reshaping that equation.

The new winners are not service providers but platform builders, like companies that own models, data pipelines and automation systems. With players like Sarvam AI, NxtGen, and BharatGen, India is beginning to build core AI IP, foundation models, agentic platforms and developer tools.

That shift is already visible. AI-native firms such as Graph AI and Leena AI are building software-first businesses with minimal human intervention. Hybrid players like Crescendo and Shopdeck are combining automation with human oversight to increase speed and reduce costs. Infrastructure firms like Scale and Turing are becoming essential enablers by supplying data pipelines and model evaluation layers.

At the same time, a new class of founders, smaller techs, younger builders and solo entrepreneurs, competing directly in global categories, is emerging. NxtGen entered the AI space, bringing India's first full-

stack agentic AI platform, 'M,' while powering the IndiaAI Mission alongside Jio Platforms, Tata Communications, Yotta and others. Solo founder Bishal Saha started building the Duolingo alternative, backed by AI and Bhashini datasets. Prominent AI-first founders include Bhavish Aggarwal (Krutrim), who is building Indian language LLMs, Maithira Raghu (Samaya AI) for financial AI and Sharbel Cherian (Key Value Software), known for bootstrapped AI products.

This signals a break from the traditional outsourcing mindset and the beginning of an IP-led ecosystem. Global capital is responding quickly: Google and Accel have announced investments of up to \$2 million in Indian AI startups through a new partnership. In September, Google also partnered with Sarvam AI, Soken AI and Gnanini, while IIT Bombay's BharatGen initiative focussed on advancing AI for Indian languages. Such initiatives show that India is being taken seriously as an AI development hub. Telecom players are also repositioning themselves as AI distribution platforms, bundling models into consumer services and accelerating adoption at scale.

Yet this expansion is running into a structural limit, namely hardware. India's AI growth today depends almost entirely on foreign-made GPUs from NVIDIA, AMD and Intel. The IndiaAI Mission relies on roughly 34,000 GPUs, a modest number compared to what leading AI labs consume globally. And unlike software, hardware resources cannot be scaled overnight.

Export controls, geopolitical tensions and supply concentration mean that GPU

access is not guaranteed. Analysts warn that tighter controls, similar to those imposed on China, could eventually restrict availability or inflate costs.

Meanwhile, as global big tech eyes the Indian AI consumer, telecom giants seem to be quietly becoming AI companies. Reliance Jio, Airtel and others are no longer just connectivity providers. They are becoming AI distribution platforms. In October, India got free access to ChatGPT when OpenAI offered a year's free ChatGPT Go access country-wide. Google partnered with Reliance Jio to offer its Gemini Pro plan worth Rs 35,100 free for 18 months to millions of users. Before that, Perplexity did the same with Airtel and OpenAI announced the rollout of free ChatGPT Go for Indians via Jio. Telecoms could become India's most powerful AI gatekeepers even as big tech squeezes into the Indian market. OpenAI plans to open its India office in New Delhi later this year.

This creates a deeper concern and a widening AI divide. Will India's GPU gap create a new form of digital inequality? Large conglomerates such as Jio, Tata and Yotta can afford dedicated GPU clusters and long-term infrastructure bets. Startups, researchers and smaller builders often cannot. As GPU prices rise and cloud access tightens, innovation risks becoming centralised among a handful of players. That imbalance could determine who gets to build foundational models and who is forced to operate at the application layer.

At the same time, India's rising AI consumption, driven by free or subsidised access to tools from OpenAI, Google and others is turning the country into one of the world's largest AI user bases. This could make India a must-win consumer market for global AI firms. This gives India leverage as a market, even if it lacks hardware sovereignty. India's advantage lies in its timing. With China constrained by export controls and western markets saturated, India has emerged as a geopolitical middle ground, a potential 'third pole' in global AI development. But that window will not stay open indefinitely. India must move quickly on three fronts — expanding domestic compute capacity, building skills beyond prompt usage into model engineering and reducing dependence on foreign hardware over time.

The ambition is evident. The talent is present. The policy push is fast. What remains uncertain is whether India can turn this into long-term AI sovereignty or whether its growth will be limited by infrastructure it does not control.

India's AI growth today depends almost entirely on foreign-made GPUs. Will it create a new form of digital inequality?

Faith-based science limits



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CENTRAL UNIVERSITY OF
HIMACHAL PRADESH



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THE recent revelations about a decade-long government-funded Panchaganya research project on cancer at Nanaji Deshmukh Veterinary Science University, Jabalpur, Madhya Pradesh, raise concerns about public accountability, scientific rigour and responsible use of taxpayers' money. An official probe indicates that Rs 19-35 crore was spent on cow dung, cow urine, raw materials and travel expenses, though the market value of the materials was far lower. Also, there was little to show in terms of credible scientific outcomes after 10 years of work.

At a time when India's health system is facing challenges, research funds should be used transparently and efficiently. Research must have a scientific basis. Fundamental disease treatment research requires strict methodology, peer review and evidence-based frameworks. The substantial spending on air travel, vehicles and non-essential equipment under this project suggests poor judgment as well as possible mismanagement of public resources, especially when basic cancer research demands robust laboratory capacity.

Clear hypotheses and rigorous oversight are needed. Research projects must also have

transparent reporting and measurable results. In this case, after years of funding, tangible research outputs are missing. There is also no evidence of effectiveness against cancer. This calls the project's initial approval and oversight into question.

The controversy underscores the need for stricter research governance. Independent audits and a reaffirmed commitment to evidence-based science over speculative or symbolic pursuits. Nanaji Deshmukh Veterinary Science University's defence that all purchases were made according to procedure does not fully address the deeper issue: whether this project met the basic standards of credible scientific research worthy of significant public investment or it succumbed to the difference between science and pseudoscience.

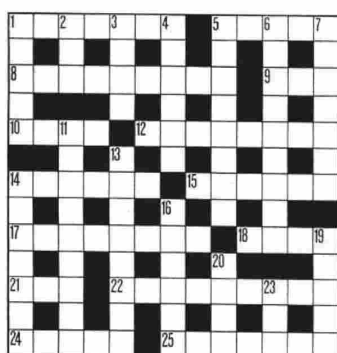
How to distinguish science from pseudoscience? 'Falsifiability' is one of the criteria. The research in question or such research cannot be 'falsified' by another laboratory research. Ad hoc hypotheses used in such research keep them out of the purview of scientific testing. For example, the relation between treatment of cancer and cow dung/cow urine will remain susceptible to one's faith and belief in the karma theory of diseases and diagnosis and the wrath of Sitala Mata. In this case, there is also another belief about religious sanctity accorded to the cow and cow dung; the same status is not accorded to other members of the cow family (Bovidae) or their dung. This is called the protective belt of auxiliary hypotheses, which is not from science but religion and mythology. The cow will be hailed as 'gau mata'.

There cannot be a clear demarcation between science and pseudoscience, but fuzzy boundaries (cow or desi cow?), an indefinitely extendable indicator list (first urine or dung of the morning or the later ones) and an unclear nature (age of the cow; does it matter or dairy cows or not?). This research is a project of pseudoscience.

Ancient Indian health science and indigenous practices will lose credibility due to such research. Only the rigour of systematic review of literature and asking the right questions can take the 'Indian' science to greater heights. But to assert this, we also need to acknowledge that 'science' will remain science only if no adjectives of black or Indian or Hindu or Islamic are added to it. The method of science and science as a discipline are two distinct domains; one may apply the method of science to study a religion, but when science is confined to a religion or religion, it will only produce another dogma.

Only the rigour of systematic review of literature and asking the right questions can take the 'Indian' science to greater heights.

QUICK CROSSWORD



ACROSS

- Merely to attract notice (3,4)
- Quiet in colour (5)
- Enterprise with unseen hazards (9)
- Piece of useful advice (3)
- Red gemstone (4)
- Liquely (8)
- Consumers' desire for a product (6)
- Disfigure (6)
- A blood-sucking fly (8)
- Part of the eye (4)
- Feel regret for (3)
- All the way (2,3,4)
- Total score (5)
- Capital of Sri Lanka (7)

Yesterday's Solution

Across: 1 Paradise, 5 Idle, 9 Set up, 10 Upright, 11 Make the grade, 13 Precip, 14 Recant, 17 Call the shots, 20 Furious, 21 Penal, 22 Code, 23 Play safe.
Down: 1 Push, 2 Retrace, 3 Depreciation, 4 Sought, 6 Dogma, 7 Entreaty, 8 Trigger-happy, 12 Specific, 15 Antenna, 16 Vessel, 18 Lurid, 19 Glece.

DOWN

- Thighbone (5)
- Sequence (3)
- Fit of petty annoyance (4)
- Very sentimental film (6)
- Evide (8)
- Dominating older woman (9)
- Fully filled (7)
- An overwhelming surprise (9)
- Diligence (8)
- Fault (7)
- At a standstill (6)
- An argument (3,2)
- Cut down (4)
- Unspecified doctrine (3)

SU DO KU



YESTERDAY'S SOLUTION

8	7	5	9	2	1	4	3	6
3	4	9	6	7	8	2	1	5
6	1	2	5	4	3	9	8	7
7	9	4	3	1	2	5	6	8
5	3	8	7	9	6	1	2	4
2	6	1	4	8	5	7	9	3
4	8	6	2	5	9	3	7	1
9	5	3	1	6	7	8	4	2
1	2	7	8	3	4	6	5	9

CALENDAR

JANUARY 31, 2026, SATURDAY

- Shaka Samvat 1947
- Margashirsha Shaka 11
- Margashirsha Purnimasa 18
- Hijari 1447
- Shukla Paksha Tithi 13, up to 8:26 am
- Shukla Paksha Tithi 14, up to 5:53 am
- Vishumbha Yoga up to 1:34 pm
- Punar Nakshatra up to 1:34 am
- Moon enters Cancer sign 8:01 pm

FORECAST

SUNSET:	SATURDAY	17:57 HRS
SUNRISE:	SUNDAY	07:34 HRS
CITY	MAX	MIN
Chandigarh	21	10
New Delhi	21	07
Amritsar	19	08
Bathinda	21	04
Jalandhar	19	08
Ludhiana	20	09
Bhiwani	24	04
Hisar	20	07
Sirsa	20	07
Dharamsala	17	05
Manali	09	00
Shimla	16	06
Srinagar	08	00
Jammu	19	09
Kargil	01	-07
Leh	-01	-09
Dehradun	26	10
Mussoorie	17	03

TEMPERATURE IN °C

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Neo-liberalisation of Education in India

Transforming a constitutional promise of universal education into a differentiated, market-governed system



Dispossession

Dawar Ashraf Mir
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India's education system has shifted dramatically over the past four decades, embodying neoliberalism's push to turn public goods into profit centres. David Harvey, a renowned British Marxist geographer and scholar of urban political economy, explains this through his concept of "accumulation by dispossession": policies that privatise public assets for private gain. Some readers may see left-leaning bias here, however, this analysis draws from clear policy facts and Harvey's economic framework, not ideology; this is just how neoliberalism works.

Neoliberalism cannot simply be defined as an economic doctrine but is instead a "political project to achieve restoration of class power." Rather than producing sustained economic growth it promised, neoliberalism has orchestrated a massive transfer of wealth from the poor to the economic elite through deregulation, privatisation, and what can be termed as "accumulation by dispossession." Unlike classical Marxistian primitive accumulation, which occurred as capitalism's historical origin, accumulation by dispossession is an ongoing process central to contemporary capitalism. It involves the commodification and privatisation of assets once held in common, the expropriation of wealth through financial mechanisms, and the forcible removal of people from means of subsistence.

In India's education sector, this process unfolded systematically. The National Policy on Education (1986) initiated the neoliberal assault by creating parallel, inferior education streams and non-formal education for the poor while

establishing almost a different stream for the elite. The 1991 economic liberalisation, driven by structural adjustment pressures, accelerated this trajectory. India's 1995 signing of the World Trade Organisation's General Agreement on Trade in Services (GATS) marked a critical threshold; education ceased to be a constitutional right and became a "tradeable service." When right to education is considered a fundamental right from ages 6 to 14 this single act transformed education's legal status from public good to commodity.

The mechanics of accumulation through dispossession in Indian education operate through four interconnected processes. First, commodification has systematised the transformation of education into a market product. Where education is just limited to some sort of a vocational training which is meant to produce a trained workforce, absolutely ignoring that education is also meant to develop and optimise human potential. The Ambani-Birla Report (2000) with its prime production view ignoring any humane aspect by proposing ending subsidised education and implementing a "user-pay" principle, it explicitly articulated the neoliberal logic that education should generate private profit. The National Education Policy 2020, while framed as progressive, took a lot of the recommendations of this report towards commodification through multiple pathways. It introduced modular, credit-based systems; it reduces holistic learning to fragments of tradeable knowledge units, mirroring capitalist production's logic of just-in-time manufacturing. Students become consumers, learning becomes a transactional exchange.

Second, privatisation has created a bifurcated system stratifying access by class. Private school enrolment has expanded from 30% (2012-13) to 35% (2021-22) nationally, with concentrated peaks in urban areas. Delhi records 46% private school share, while states like Jharkhand remain at 3.5%. It is pertinent to mention here that not even all private schools are equal. There is a greater disparity between elite and expensive private schools and low cost badly run private schools both in rural

and urban areas with lower social economic status. The "learning crisis" literature by researchers at the Centre for Global Development, a think-tank based in Washington DC, for India shows that years of schooling have increased, but learning per year of schooling has not, implying declining or stagnant productivity of the public system. As public education quality has declined, private schools both elite and "low-fee" proliferated to capture the ensuing demand, extract surplus from families desperate for alternatives. The Global Education Industry (GEI) has penetrated India, with multinational corporations, venture capital, and philanthropies treating India's poor as profit frontiers.

Third, financialisation has shifted higher education costs from state to individual households, proletarianising educational access. Delhi University's revenue from student fees exceeded ₹200 crore in fiscal 2023-24, with institutions increasingly dependent on fee income as UGC grants stagnate. The proposed Higher Education Financing Agency (HEFA) replaces grants with loans, effectively privatising finance while maintaining state legitimacy. This transforms education into debt, neoliberally burdensome for SC/ST/OBC students already marginalised historically.

Fourth, datafication represents neoliberalism's latest enclosure. The NEP 2020's Academic Bank of Credit (ABC) and Automated Permanent Academic Record System (APAR), linked to Aadhaar (India's biometric ID), centralises student data. While framed as convenience, commodifies student information for corporate marketing, and fragments learning into discrete, tradeable units. Students become generators of data within systems optimising for efficiency and profit. India also faces several structural data protection issues as our core framework rests on the DPDP Act, 2023 and legacy provisions in the Information Technology Act, 2000, which still leaves specific rules fragmented and sometimes inconsistent.

These mechanisms consolidate class power in education systematically. The poorest 80% of Indians remain trapped

in under resourced schools, and students from scheduled tribes, scheduled castes and Muslim communities are still far less likely than others to reach and complete senior secondary or higher education. Meanwhile, elite private schools produce graduates competing in global markets. This segregation is not accidental but structural. Neoliberalism explicitly fragments "comprehensive" public education (which briefly promised universality) into stratified systems serving different classes.

“

Universities now highly prioritise market-oriented disciplines -engineering, business- while systematically devaluing humanities and social sciences.

Knowledge capitalism intensifies this pattern. Universities now highly prioritise market-oriented disciplines (engineering, business) while systematically devaluing humanities and social sciences that foster critical consciousness. Facilities have been increasingly pressured toward publication metrics, patent production, and industry partnerships rather than public intellectualism. Teachers' agency is also increasingly eroded with continuous contractualisations which strips them of job security and autonomy. This process mirrors insight that neoliberalism deploys the state to enforce market discipline while appearing to reduce state power.

The Indian state's role exemplifies this paradox. The government unilaterally implemented NEP 2020 without parliamentary debate, deployed Supreme Court judgments favouring private education, and closed student unions, while claiming to reduce state intervention. The state strengthens market imperatives through coercive legislation while dismantling spaces for democratic dialogue.

India's Constitution (Articles 14, 15, 45) mandated free, equitable, non-dis-

criminatory education. By systematically privatising education since 1986, the Indian state has formally abandoned these commitments under neoliberalism's pressure. Resistance exists but remains fragmented. Unlike earlier movements centered on class struggle and Common School System demands, contemporary resistance often splits into identity-based (caste, gender) or institutional (legal, NGO) approaches that, while important, deflect from capitalism's fundamental logic of accumulation. As the economist Ravi Kumar argues, alternatives must centre on the "capital-state-education matrix," recognising that genuine equity requires not minor reforms but dismantling the project itself.

Conclusion:

Education remains a contested terrain where capital's relentless drive to convert all life into commodities confronts emancipatory possibilities. Harvey's accumulation-by-dispossession framework illuminates how neoliberalism operates through state mediated privatisation of commons, financialisation of access, and reproduction of class power. In India, this has meant transforming a constitutional promise of universal education into a differentiated, market-governed system where the poor are systematically dispossessed of educational opportunity.

Resisting this requires building what is termed as "counter-hegemonic discourse" organising education around principles of democracy, equity, and collective liberation rather than individual consumption. This demands substantial public investment, fee regulation, strong public universities insulated from market pressure, and crucially, restoration of education's role as a site for developing critical consciousness and challenging systemic oppression. Only through such systemic transformation can education reclaim its status as a fundamental right rather than a commodity available only to those with purchasing power.

Dawar Ashraf Mir is an entrepreneur managing infrastructure and agricultural ventures in Kashmir. He is also a fellow of the Ananta Aspen Global Leadership Network (AGLN)

An enormous task ahead

India has become the world's fourth largest economy and is looked upon as a stable country and a major power



Policy Matters

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On January 1 India took over the BRICS Chair. On January 13 External Affairs Minister S Jaishankar launched the logo, theme and website of India's Chairship. Speaking on the occasion Jaishankar noted "In 2026, BRICS will complete twenty years since its inception, during which it has steadily evolved into a significant platform for cooperation among emerging markets and developing economies". It is true that the group of BRIC countries-Brazil, India, Russia and China-was originally conceived as a group of emerging economies. However, over the past two decades and more, the countries comprising the group have gone beyond the status of "emerging economies".

In the 1990s Russian Foreign Minister Primakov mooted the idea that the interests of "emerging" economies coincided. This was also the decade when the Cold War had ended and countries such as India and Russia had embarked on their economic liberalisation. As the century turned, the realization that these emerging economies offered markets was picked up by US financial companies. One of their executives thought in 2001 of a group consisting of Brazil, Russia, India and China. At that stage the four countries could be considered emerging. This is because their GDPs did not put them in the first rank of economies.

In 2001, China was sixth in the world behind the US, Japan, Germany, Britain and France; Brazil was at number ten and India at number thirteen. Ten years later China had become the second largest economy in the world. The first decade of the century also witnessed the greatest turbulence in the global economy after the Great Depression which began in 1929 and continued for

almost ten years. This turbulence in the financial markets in 2008 led to a recession. It brought these four countries together. The first BRIC summit was held in Russia in 2009. A year later South Africa joined the group making it BRICS.

The path of the BRICS countries since the first summit has not been easy but they have made progress, although, at different rates. India has become the world's fourth largest economy and is looked upon as a stable country and a major power. It has an enormous task ahead to reduce and then eliminate poverty but it is working to improve the lot of its people. Russia, Brazil and South Africa despite hiccups have also done fine. The real story of these times, though, is the rise of China.

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Jaishankar showed a keen awareness that India had assumed the Chairship of the group at a time of great change.

China continues to be the second largest economy of the world. Its GDP in 2024 was around US \$ 19 trillion as compared to America's US \$ 24 trillion. More importantly, its hard power has grown. The recently released National Defence Strategy by the US Department of War noted "By any measure, China is already the second most powerful country in the world - behind only the United States- and the most powerful state relative to us since the 19th century. And, while China faces very significant internal economic, demographic and societal challenges, the fact is that its power is growing". This is a sobering assessment for all countries, including India. This country's BRICS' challenge is therefore to ensure that the group which now includes, in addition to the founding four and South Africa, Egypt, Ethiopia, United Arab Emirates, Indonesia and Iran as members, does not come to be dominated by China.

India has to meet its BRICS' challenge in the world in churn because of the US weakening the world order which itself had established and the

enormous change taking place in science and technology. The world is in the midst of the fourth industrial revolution with rapid advances taking place in Artificial Intelligence, Robotics and the Internet of Things. Jaishankar showed a keen awareness that India had assumed the Chairship of the group at a time of great change. He said "The current global environment presents complex and interlinked challenges. Geopolitical uncertainties, complicated economic landscapes, climate-related risks, technological changes, and persistent development gaps continue to affect countries across regions. In this context, BRICS remains an important forum that encourages dialogue and cooperation, and practical responses, taking into account national priorities and different stages of development".

Jaishankar indicated India's priorities in these areas - "the four key priorities of India's Chairship- Resilience, Innovation, Cooperation, and Sustainability - they will provide a coherent and balanced framework across the three foundational pillars of BRICS: political and security, economic and financial, cultural and people-to-people exchanges". All these themes are fine but the real priority will have to be to ensure that BRICS remains a forum which is not dominated by China. This will require deft diplomacy in the coming year.

An immediate issue that India will need to assist BRICS to navigate is the issue of the international reserve currency. The US is determined to maintain the Dollar as the world's reserve currency which has greatly contributed to US global economic influence. The BRICS countries have looked at creating their own pool of currency for trade purposes. Trump has seen this as a hostile act. He had opposed such a move after his election in November 2024 and also after assuming office in January last year. The Dollar lost value last year and Trump's seemingly erratic actions has led many countries to hedge by buying gold. While looking at its economic and strategic interest India will have to create a BRICS consensus on the issue of reserve currency.

Another matter India will have to handle carefully in the BRICS context relates to Iran which continues to be in US cross hairs and has witnessed great domestic unrest.

Social Media vs the Newsroom

Where does Kashmir feel more real?



Comparison

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In present day Kashmir, two platforms are building two types of narratives parallel to each other. One is the fast, raw, emotional universe of Instagram reels, YouTube shorts, Facebook posts and X threads. And the second, the cautious, verified, structured space of mainstream newsrooms. The story is not about which one is right, but why they look and feel so different and what that gap means for public understanding.

For many years, the newsroom was the main source of information for a common Kashmiri. Be it the English dailies like Greater Kashmir or the Urdu dailies like Srinagar Times or the news bulletins of All India Radio or Doordarshan. A reader used to rely completely on these prime sources for news updates. He would receive news mostly about elections, encounters, official visits, and weather updates. The readers had no alternative. The readers would not have what the state and the mainstream media produced. Curated, constrained and authenticated, this version carried authority.

The Gen-Z's digital world;

The social media platforms like Facebook, Instagram, TikTok, Twitter etc - more so, after the introduction of 4G - have revolutionised the media world. They work on their own terms - social media privileges feeling over form, speed over structure, and emotion over facts. Youth prefer social media to stay updated. The legacy media news that is published the following day is a relic for Gen-Z. They want intimate and immediate updates. It caters to their charged emotional selves. For their reality is in the vibe. Enjoying barbecues on the banks of Dal Lakes, sipping coffee at the cafes and sharing the happy feeling on Insta is the discourse they want. Who has won the elections in Bihar, doesn't matter. Kashmir feels alive, emotional and immediate on social media as per the Gen-Z. On one hand you see beautiful snowbound mountains in the background and the Gen-Z guys enjoying the bike ride on the foreshore

road. On the other hand, a patient in need of O+ve blood at the SMHS hospital and hundreds rushing to donate it. Following day, youth rushing to rescue tourists from the highway closure after they appealed for a help on a Facebook post that went viral. Then posing with the happy tourists and sharing the images on Insta is the reality that a Kashmiri youth is happy to live with. The image of Kashmir on social media is the real Kashmir as per the youth. It mirrors their daily anxieties, joys, frustrations, and aspirations far better than a clipped newspaper report ever could.

The Other Generation's Reliable Legacy Media

But for the other generation that are in the later stages of life, the social media is a shallow world. It is unreliable and unfiltered. Trivial issues get viral. A cow stolen by unknown thieves or someone's ATM card is lost becomes the topmost news of the day. Likes, views and comments decide the authenticity of the matter. Kinetic reels and unfiltered livestreams rule the roost. Algorithms reward the sensationalism. Outrage travels faster than nuance. Misinformation spreads like fire. So, for the older generation, Kashmir as portrayed by newsrooms depicts real issues that have broader implications. For example, the country's relations with America or Russia, or the historical background of Indus Water Treaty. Professionals are hired to offer expert opinions on key sectors like health and education. Every tom, dick and harry can't pass off as a journalist. Emotions are muted. Sensationalism is avoided and stories are backed by reporters working at the ground level. It is also the version that remains on record, archived, cited, and referenced long after viral posts disappear.

Conclusion:

So, Kashmir feels sensitive, passionate and immediate on social media while as in the legacy media though it feels reserved but measured and more sensible. Reality lies somewhere in between the two streams that flow sometimes parallel & other times opposite to each other, but neither of them can exist alone. Both need to complement each other.

Post Script

Legacy media needs to exploit the space of social media. Like many media houses have opened official social media accounts to reach out to public. The most readout newspaper in the valley Greater Kashmir has been the pioneer in this regard. Their initiatives like GKTV, and GKSC are examples to let people stay connected with the mainstream media.

Peer Asif Manzoor, participant GKSC.

Oped

Greater Kashmir's Understanding the Law Initiative

Structuring Industrial Harmony

Exploring Standing Orders, Notice of Change, and Voluntary Reference of Disputes to Arbitration under the Industrial Relations Code, 2020



Legal Desk

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The Industrial Relations Code, 2020 ("Code") brings together and streamlines important aspects of labour relations with the objective of promoting industrial harmony, transparency, and predictability in employer worker relationships. Among its most significant features are the provisions dealing with Standing Orders, Notice of Change and Voluntary Reference of Disputes to Arbitration. These mechanisms collectively regulate service conditions, ensure orderly consultation before altering employment terms and provide a consensual framework for resolving industrial disputes without prolonged adjudication. By codifying rights, obligations, and procedures, the Code seeks to balance managerial flexibility with worker protection while reducing uncertainty and conflict in industrial establishments.

To which industrial establishments do the provisions relating to standing orders apply?

These provisions apply to every industrial establishment in which three hundred or more workers are employed, or were employed, on any day during the preceding twelve months.

Are there any industrial establishments to which these provisions do not apply despite meeting the worker threshold?

Yes. These provisions do not apply to industrial establishments insofar as the workers employed therein are governed by service rules such as Fundamental and Supplementary Rules, Civil Services rules relating to classification, control, appeal, temporary service, leave, regulations applicable to civil services, defence civilians, railway establishment rules or any other rules or regulations notified by the appropriate Government.

Who is responsible for making model standing orders?

The Central Government is responsible for making model standing orders relating to conditions of service and other incidental or connected matters.

What is the status of model standing orders before final certification of standing orders for an establishment?

From the date these provisions

become applicable to an industrial establishment until the date the standing orders are finally certified and come into operation, the model standing orders are deemed to be adopted in that establishment.

During this interim period, how are model standing orders treated?

During this period, the provisions applicable to certified standing orders relating to operation and modification apply to the model standing orders in the same manner.

What is the obligation of the employer regarding preparation of draft standing orders?

The employer must prepare draft standing orders within six months from the commencement of the Code, based on the model standing orders. **What matters must be covered in the draft standing orders prepared by the employer?**

The draft standing orders must cover all matters specified in the First Schedule and any other necessary matters relevant to the nature of the industrial establishment, provided such provisions are not inconsistent with the Code.

Is consultation required before submitting draft standing orders?

Yes. The employer must consult the Trade Unions, recognised negotiating union, or members of the negotiating council, as applicable, before submitting the draft standing orders.

To whom are the draft standing orders submitted for certification?

The draft standing orders must be forwarded, electronically or otherwise, to the certifying officer for certification.

What happens if an employer adopts the model standing orders without modification?

If the employer adopts the applicable model standing orders, they are deemed to be certified, and the employer must inform the certifying officer in the prescribed manner.

Can the certifying officer require changes even when model standing orders are adopted?

Yes. If the certifying officer has observations, the employer may be directed to amend the adopted standing orders within the prescribed period.

When are modifications to standing orders required to be prepared?

If modifications are required, the employer must prepare and submit the draft modifications within six months from the date the provisions become applicable to the establishment.

What procedure does the certifying officer follow upon receiving draft standing orders or modifications?

The certifying officer issues notice to the negotiating union, negotiating council, Trade Union, or worker representatives (where no union exists) seeking their comments.

Are workers or their representatives

given an opportunity of being heard?

Yes. After receiving comments, the certifying officer provides an opportunity of being heard to the concerned unions or worker representatives.

What decision does the certifying officer make after hearing the parties?

The certifying officer decides whether any modification or addition is necessary to render the draft standing orders certifiable and records the decision in writing.

Is there a time limit for certification of standing orders?

Yes. The certifying officer must complete the certification process within sixty days from receipt of draft standing orders or draft modifications.

What happens if the certifying officer fails to act within the prescribed time?

If no decision is made within sixty days, the draft standing orders or modifications are deemed to have been certified upon expiry of that period.

What conditions must be satisfied for standing orders to be certifiable?

Standing orders must provide for every applicable matter listed in the First Schedule and must conform to the provisions of the Code.

Who determines the fairness or reasonableness of standing orders?

The certifying officer or the appellate authority adjudicates upon the fairness or reasonableness of standing orders, keeping in view the model standing orders.

What happens after standing orders or modifications are certified?

The certifying officer sends authenticated copies to the employer and the concerned unions or worker representatives within seven days.

What documents must accompany draft standing orders or proposed modifications?

They must be accompanied by a statement containing prescribed particulars to the employer and the concerned unions or worker representatives. Trade Union membership, and the negotiating union or council, if any.

Can employers in similar establishments submit joint standing orders?

Yes. Subject to prescribed conditions, a group of employers in similar establishments may submit a joint draft of standing orders.

How are existing standing orders treated upon commencement of the Code?

Existing standing orders continue to operate and are deemed to be certified, insofar as they are not inconsistent with the Code or rules.

What powers do certifying officers and appellate authorities possess?

They have powers of a civil court, including receiving evidence, administering oaths, enforcing attendance of witnesses, and compelling production of documents.

Can clerical or arithmetical errors be

corrected?

Yes. Such errors or accidental slips may be corrected at any time by the certifying officer or their successor.

Who can file an appeal against an order of the certifying officer?

The employer, Trade Union, negotiating union, negotiating council, or worker representatives may file an appeal.

What is the time limit for filing an appeal?

An appeal must be filed within sixty days from receipt of the certifying officer's order.

When do standing orders come into operation?

If no appeal is filed, they come into operation after thirty days from dispatch of authenticated copies. If an appeal is filed, they operate seven days after dispatch of the appellate authority's order.

How must standing orders be made available to workers?

The employer must maintain the text of certified standing orders in the prescribed manner and manner for workers' information.

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Standing Orders bring clarity and uniformity to service conditions.

Is there a public record of standing orders?

Yes. Certified standing orders are filed in a register or uploaded electronically, and copies are provided to applicants upon payment of prescribed fees.

Can standing orders be modified immediately after certification?

No. They cannot be modified for six months unless there is an agreement between the employer and workers or their representatives.

Who can apply for modification of standing orders after the restricted period?

The employer, worker, Trade Union, or worker representative body may apply for modification.

What must accompany an application for modification?

The application must include proposed modifications and, where applicable, a certified copy of the agreement between the employer and workers.

How are applications for modification processed?

The same provisions applicable to initial certification apply to modification proceedings.

Is oral evidence allowed to contradict certified standing orders?

No. Oral evidence that adds to, varies, or contradicts certified standing orders is not admissible in any court.

Who decides disputes regarding interpretation or application of standing orders?

The Tribunal having territorial jurisdiction over the establishment decides such questions.

Is the Tribunal's decision binding?

Yes. The Tribunal's decision is final and binding on the employer and workers.

What is the time limit for completing disciplinary proceedings when a worker is suspended?

The investigation and inquiry should ordinarily be completed within ninety days from the date of suspension.

Is a suspended worker entitled to subsistence allowance?

Yes. Standing orders must provide for payment of subsistence allowance during suspension.

What is the rate of subsistence allowance during suspension?

It is fifty percent of wages for the first ninety days and seventy-five percent thereafter. If the delay is not attributable to the worker.

Can the appropriate Government exempt establishments from these provisions?

Yes. The Government may exempt any industrial establishment or class of establishments, conditionally or unconditionally.

When is notice required before changing service conditions?

Notice is required when an employer proposes to change service conditions relating to matters specified in the Third Schedule.

What are the requirements for such notice?

The employer must give prescribed notice of the proposed change and cannot implement the change within twenty-one days of giving notice.

When is notice not required?

Notice is not required when the change is pursuant to a settlement or award, applies to certain government-regulated employees, is necessitated by an emergent situation involving shift changes in consultation with the Grievance Redressal Committee, or is directed by the Government or a settlement or award.

Can the Government exempt certain establishments or workers from notice requirements?

Yes. If public interest so requires and application would cause serious repercussions, the Government may exempt such establishments or workers.

When can an industrial dispute be referred to arbitration?

When an industrial dispute exists or is apprehended and both the employer and workers agree to refer it to arbitration.

How are arbitrators appointed?

The dispute is referred to such

person or persons as arbitrators as specified in the arbitration agreement. **What happens if there is an even number of arbitrators?**

The agreement must provide for appointment of an umpire whose decision prevails if arbitrators are equally divided.

What are the formal requirements of an arbitration agreement?

It must be in prescribed form and signed by the parties in the prescribed manner.

Who must receive a copy of the arbitration agreement?

The appropriate Government and the conciliation officer must receive a copy.

What happens if the Government is satisfied that the reference represents the majority?

The Government may issue a notification, and non-signatory employers or workers concerned in the dispute are given an opportunity to present their case. **How are workers represented before the arbitrator?**

Representation depends on whether there is a negotiating union, Trade Union, or none, and in individual termination disputes, the worker may appear personally or through an authorised representative.

What is the duty of the arbitrator after investigating the dispute?

The arbitrator submits a signed arbitration award to the appropriate Government.

Can strikes or lockouts be prohibited during arbitration?

Yes. The Government may prohibit their continuance once arbitration is notified.

Does the general arbitration law apply to such arbitrations?

No. The Arbitration and Conciliation Act does not apply to arbitrations conducted under these provisions.

Therefore, the framework governing Standing Orders, Notice of Change, and Voluntary Reference of Disputes to Arbitration, under the Code reflects a shift towards structured governance of industrial relations and greater emphasis on consultation and consensus.

Standing Orders bring clarity and uniformity to service conditions, the requirement of prior notice safeguards workers against abrupt changes and voluntary arbitration encourages dispute resolution through mutual agreement rather than adversarial processes.

Together, these provisions aim to foster stability, fairness and efficiency in industrial relations, reinforcing the broader objective of the Code to create a predictable and cooperative industrial environment conducive to both economic growth and workforce security.

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The Unspoken Legacy

My son's respect for a man he never knew revealed something deeply spiritual about blood and heritage



Roots

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Not every profound lesson comes through books, sermons, or long speeches. Some lessons enter our lives quietly, without announcement, and settle gently into the heart. One such lesson came to me yesterday at the main gate of our cherished home in Srinagar.

It was a calm afternoon. Sunlight fell softly on the gate when I noticed my elder son, Arshad, standing there with a water pipe in one hand and a soft cloth in the other. He was gently and carefully wiping the brass nameplate fixed to our gate.

That brass plate bears the name of my late father, Syed Fikhar Gilani, who left this world in 2001. Arshad never met his Dadaji. Yet he knows his name, his stories, and his values. As Arshad wiped the plate, the sunlight caught the golden letters, and tiny drops of water sparkled like pearls as they slid down. He worked slowly, reverently, as though he were tending

to something sacred. Moved by the sight, I walked closer and asked softly,

"Dear Arshad, what are you doing?"

Without breaking his gentle rhythm, he looked up at me and replied,

"Papa, the nameplate was dusty, and it hurts to see dust on Dadaji's name."

His words went straight into my heart.

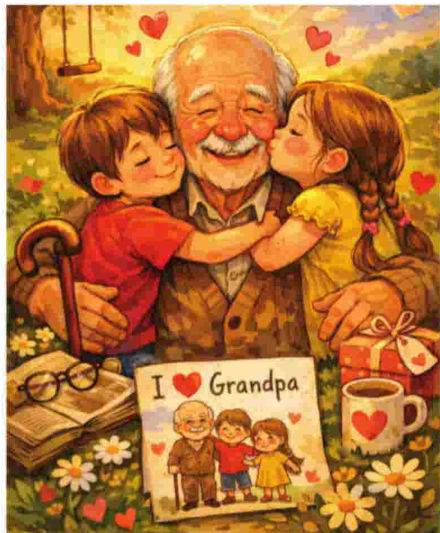
Here was my son — a child who had never seen his grandfather, never heard his voice — feeling genuine pain at the sight of dust resting on his grandfather's name. This was not merely an act of cleaning. It was an act of love, loyalty, reverence, and deep emotional inheritance.

In that moment, my heart opened to a beautiful vision. I imagined my father — Arshad's Dadaji — in the gardens of heaven, smiling with awe and endless affection at his grandson. I saw his hands raised in prayer, and I could almost hear him whisper:

"May you always live with respect, love, and happiness."

May your heart remain as clean as you have made my name today."

That image stayed with me as Arshad continued wiping each letter, one by one. Every stroke of his cloth felt like a silent prayer. Every drop of water felt like a blessing. The act had transcended the cleaning of a nameplate. It had become an act of preserving family honor, living memory, and



invisible bonds.

Arshad's respect for a man he never knew revealed something deeply spiritual about blood and heritage. Love does not travel only through memories; it also travels through blood, values, and silent emotional inheritance. It flows through generations, shaping identity without words.

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I realized once more how values travel quietly from one generation to the next.

By polishing his grandfather's nameplate, Arshad was not merely honoring the past. He was, in essence, polishing his own soul.

My father had left us when I was still young. Life afterward was often hard. Over the years, memories sometimes faded like old photographs. But as I watched Arshad bent over that brass plate, I felt my father's presence near me again — not as a fading memory, but as a living spirit rejoicing in the heavens.

I realized once more how values travel quietly from one generation to the next. They do not need loud speeches or formal lessons. They pass silently through love, respect, and the power of example. Without ever meeting his grandfather, Arshad had

inherited the deep reverence I carry for my father.

When he finally stood up, water dripping from the pipe, the brass nameplate shone like pure gold in the sunlight. It was no longer just a name fixed to a gate. It had become a luminous bridge of love connecting three generations — my father, myself, and my son.

I placed my hand softly on Arshad's shoulder. No words were needed. His heart understood mine. My heart was full to bursting. Inside, I whispered a prayer — for my father's peaceful soul and for my son's bright, noble future.

This small, simple act by Arshad reminded me of a profound truth that many people forget: We are all living links in a long chain of love and duty.

Our identity is not built by wealth, power, or titles. It is built by the respect we show to those who came before us. When we honor our elders, our roots, and our heritage, we do not lose ourselves. We become stronger, deeper, and more whole.

In cleaning his grandfather's nameplate, Arshad did not only honor the past. He protected the dignity of his own future.

In respecting his roots, he safeguarded his own being.

This is the lesson I want to share.

Syed Majid Gilani is a Government Officer, writes on family, faith, moral values, and lived human experience.

Last Day to join Private Channel, I am closing it now.

✓ I Give My Earliest Newspapers updates from 5 AM in Private channel with All Editions

◆ Indian Newspaper

- 1) Times of India
- 2) The Hindu
- 3) Business line
- 4) The Indian Express
- 5) Economic Times
- 6) Financial Express
- 7) Live Mint
- 8) Hindustan Times
- 9) Business Standard

◆ International Newspapers channel

[European, American, Gulf & Asia]

◆ Magazine Channel

National & International
[General & Exam related]

◆ English Editorials

[National + International Editorials]





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

—Rammath Goenka

CAMPUS EQUITY RULES MUST BE SHARPENED, BUT NOT AS DEMANDED

TN suspending the University Grants Commission's new regulations to promote equity in higher education institutions, the Supreme Court has halted a reform initiated by itself. In February 2025, a month after the top court ordered UGC to revise the 2012 rules addressing caste-based discrimination, the education regulator released a draft for public consultation. The new regulations promulgated on January 13 incorporated several suggested changes, including recognising prejudice against other backward classes and removing penalty for false complaints, which might deter students from coming forward. The need for revision was felt because neither the earlier rules nor the laws meant to prevent atrocities against members of lower castes and tribes were effective in dealing with on-campus discrimination.

One of the main objections to the new rules—that anti-caste discrimination be broadened to include those against higher castes—has *prima facie* logic on its side despite the harsh lived reality of most of India. But experts have pointed out that the narrowness alleged is addressed in Clause 3(e) that includes discrimination on grounds of “religion, race, caste, gender, place of birth, disability, or any of them”. It's also true that in a country still smarting from the violence unleashed by the Mandal Commission reforms, it would have been more prudent to first make a strong case for such reforms rather than taking the lesson of reality for granted.

There are, however, other ways the rules can be sharpened. Expansion of the definition of discrimination to comprise “any distinction, exclusion, limitation, or preference” is welcome, but without offences specified it remains prone to misuse. HEIs must be defined in a broader manner to include IITs and IIMs as well as standalone institutes issuing diplomas. Clause 8(c) must be tightened so that an equity committee cannot pass on a case if it deems another panel can deal with it better—the kind of loophole that has weakened the work of committees addressing sexual harassment on campus.

It cannot be lost on policymakers that the seeds of prejudice are sown far before a student enters college. Sensitisation programmes of the sort the UGC rules mandate must also be made compulsory in schools, adapted with innovative design to attract and train impressionable minds. If it's not taken up as a national mission aimed at a younger age, we would continue to need prohibitory regulations for the later years.

KERALA PICKS OPTICS OVER FISCAL ACCOUNTABILITY

FOR Kerala Finance Minister K N Balagopal, the final budget before the assembly elections was expected to be a high-wire act. While the state's frail economy demanded that he be prudent, political compulsions required him to be populist. So unsurprisingly, instead of consolidating the fragile recovery he had carefully charted over the past few years, Balagopal chose to wobble at a critical moment, conceding ground to electoral pressures. The decision to announce a new pay commission, in particular, risks derailling hard-won fiscal gains. Another blow would be the assured pension scheme ensuring 50 percent of the last basic pay as the maximum pension.

The budget arithmetic is precarious and is premised on highly optimistic revenue assumptions. The estimates for the state's own tax revenue as well as its share in central taxes and duties appear ambitious, especially when juxtaposed against the figures for the current fiscal. The budget speech leaned heavily on the narrative of “central neglect”. By attributing fiscal stress to reduced borrowing limits and a shrinking share of central taxes, the minister framed the crisis as a struggle for federal rights rather than a consequence of structural imbalances within the state's finances.

The warning signs are visible in the numbers. Salaries, pensions and interest payments together account for a staggering 76.66 percent of the total revenues in 2025-26 and are projected at 71.38 percent in 2026-27. This leaves little room for manoeuvre. It's a given that as committed expenditure rises, the flexibility to spend on development, capital investment and growth-oriented sectors shrinks.

To his credit, Balagopal has formally adhered to fiscal discipline. Despite enhanced welfare spending, the deficit has been pegged at 3.4 percent, lower than the 3.78 percent estimated for the current year. Kerala's debt-to-GSDP ratio, now at 33.44 percent, has also improved from a high of 38.47 percent in 2021. This consolidation, however, remains fragile and heavily contingent on revenue buoyancy and expenditure restraint—both of which are now under strain.

The budget stands out as a triumph of political optics over fiscal accountability. Wage hikes for pre-primary teachers, Asha workers, Saksharatha Preraks and noon-meal workers are intended to reinforce the LDF government's welfare credentials at a politically sensitive moment. It remains to be seen if these are enough to overcome the perceived anti-incumbency sentiments and hand the CPI(M)-led front an unprecedented third successive term.

QUICK TAKE

SCREENING WITH AI

AS with all disruptive technologies, the goodness of artificial intelligence depends on its use. An example is a new study published in *The Lancet* that shows how AI-led analysis can detect breast cancer at an early stage in many more cases than otherwise possible. By analysing mammograms of 100,000 Swedish women, it reduced diagnoses in the years after screening by an eighth. However, Dr Kristina Lang, one of the co-authors of the study, cautioned that only tested AI tools be used and they be fed with reliable data gathered from continuous screening. India, which has a vast data repository from the national cancer screening programme, would do well to collaborate to deploy such technology across the country.

THE University Grants Commission's new rules to promote equity in higher education institutions—a reform of its 2012 rules—has stirred controversy, mostly in north India. This week, responding to a plea of those opposed, the Supreme Court has kept the new regulations in abeyance and retained the 2012 rules till a final decision is taken.

However, a careful look at the points raised by the agitators shows that the provisions they are opposed to do not justify their claims. Evidence does not support their arguments. To discuss the points, it is necessary to look back at the reasons for framing the 2012 regulations in the first place.

The origin of legal safeguards against caste- and untouchability-related discrimination goes back to the enactment of the Untouchability (Offences) Act in 1955, renamed as the Protection of Civil Rights Act in 1979, and the Scheduled Castes and the Scheduled Tribes (Prevention of Atrocities) Act, 1989.

Unfortunately, one major limitation of these laws is that they nearly ignore the discrimination in education institutions, except on admitting SC/ST candidates. Presumably, the reason is that those who enacted these Acts believed that, unlike other institutions, education campuses would be immune from caste discrimination, as they are managed by educated people. However, they did not realise the weak connection between literacy and discrimination, for it was learned Brahminical scholars who authored the smritis that laid the moral principles underlying the caste system, which upheld inequality and social exclusion.

Shocked by the frequent deaths by suicide at the All India Institute of Medical Sciences and other institutes of repute, the Union health ministry set up a committee in 2008 to enquire into the causes. The committee came up with empirical evidence of discrimination—not in all, but in some spheres of teaching, evaluation, use of laboratories, sports, social life, and in hostels and dining halls—towards SC/ST students by higher-caste students, teachers and administrators. This led to the framing of the 2012 regulations.

However, due to their ineffective implementation, the discrimination continued, only to shock the nation's conscience after the tragic deaths by suicide of Rohith Vemula in 2016, Payal Tadi in 2019 and Darshan Solanki in 2023, to note a few examples. The mothers of some of the victims approached the Supreme Court seeking direction to the UGC to reform

The new UGC rules promoting equity in education institutes were needed because the older ones were not working. Facts debunk the arguments of those agitating against them

AN UNFOUNDED BACKLASH TO UGC RULES FOR HARMONY

SUKHADEO THORAT

Former Chairman, UGC



MANDAR PATIDAR

and effectively implement the 2012 regulations. The UGC brought out the 2026 regulations on the top court's advice.

However, some students in the general category opposed them on the ground that they would bring further division between the SC/ST and Other Backward Class students and the general students, lead to reverse discrimination of higher-caste students and induce false cases against them.

How valid are these arguments? In my view, they are not. Although the 2026 rules suffer from other limitations, they at least contain provisions to promote harmony and social inclusion among students. Studies show that Indian campuses are highly diversified—in 2018, of all the students in higher education, 5 percent were ST, 14.86 percent SC, 37 percent OBC, 27 percent high castes, 9.63 percent Muslim,

2.67 percent Christian, and about 3 percent Sikh, Buddhist or Jain. This diversity can result in a measure of division on the lines of caste, tribe and religion.

But this link between diversity and division is a universal phenomenon. In US universities, it's found between white and black students, and between Muslim, Christian and Jewish ones. Recognising the problem, American institutions have introduced special courses on civic education to unlearn the democratic belief the students might have cultivated through socialisation in family and society. They attempted to prepare students to be better-informed citizens—to engage with the values of liberty, equality, individual worth, open-mindedness, and willingness to collaborate for a common good.

Indian campuses that are characterised by caste, race and religious diversity

CLUBBING ANEW TO OLD CHANTS

MADHAVAN NARAYANAN

Senior journalist

REVERSE SWING

Shankar. The evening saw long-haired rockers wielding electric guitars singing energetic bhajans to thunderous claps. Looking back, I found Harrison's plaintive “My sweet lord”, released in 1970, truly devotional because of its rhythmic chanting that blended “Hallelujah” with “Hare Krishna” in a non-denominational spirituality. It seemed to go beyond the shifting sands of cultural modernity.

We now have fancily-named bhajan groups like Backstage Siblings and Kesava's Home. What's more, their concerts carry ticket prices that resemble club gigs. They are not your everyday free session at the local temple. The phenomenon took me on a reverse swing in time.

I had my own brush with bhajan cool in the 1970s and 80s when The Beatles era spawned its early seeds. Guitarist George Harrison embraced Hinduism with a zeal that coincided with the rise of the Hare Krishna movement. As a youngster, I heard “I am missing you”, produced by Harrison, composed by Pandit Ravi Shankar and sung by the sitarist's sister-in-law Lakshmi Shankar. The song expressed a longing to encounter Lord Krishna with English lyrics: “Though I can't see you, I hear your flute all the while.” Frankly, I found it somewhat amusing and not quite spiritual, especially as it was played on Western pop music shows of All India Radio.

Then in 1981, Afro-rock band Osibisa staged a live show on the India Gate lawns in the heart of New Delhi and sang “Raghu-pati raghu-pati Raja Ram” (officially titled “Joy of On”) that kept spiritual Indians bubbling amid a growing fascination for rock.

Spiritual pop goes back in time. Lucan-born Cliff Richard, who spent his early childhood in Calcutta, embraced Christianity publicly at a rally by American evangelist Billy Graham in 1966, putting behind his hits like “Bachelor Boy” and “Summer Holiday”. His guitar embraced Christian gospel music.

Hinduism was not far behind. In the early 2000s, I saw a bhajan-club act closer to the contemporary version in suburban Bengaluru at the 250-acre Art of Living headquarters founded by Sri Sri Ravi

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MAILBAG

WRITE TO: letters@newindianexpress.com

Economic paradox

Ref: Eco Survey highlights (Jan 30). The survey presents a precarious paradox: while headline growth shines, the rupee's tumble and fleeing foreign capital signal structural cracks. The true alarm, however, is “fiscal populism”: To stabilise the rupee and revive investment, we must pivot from competitive freebies to productive capital expenditure. **Nilesh Dubey, Ahmedabad**

Prasadam politics

Ref: Laddu finding ought to impose wider restraint (Jan 30). The editorial should sensitise all the concerned. The emotionally prolonged and fierce episode carried on for some time showed how our politicians stoop to any extent to gain political mileage. **A R Rajmohan, Anantapur**

Gig growth

Ref: Why gig economy turns the clock on progress (Jan 30). The editorial misses the forest for the trees. Any last-mile service—usually ideal for users—involves workers and it cannot be deemed exploitation. Evolution of innovative business models and products are inevitable for growth, which requires realignment and not rebuke. **Rajaram Kumar, Bengaluru**

Guide addressees

Ref: Social sector paradox (Jan 30). Adolescence is a very crucial period in one's life, as it's the time when students enhance their learning outcome and life skills. Unenrolled students may fritter away their time and energy in unproductive work or even anti-social activities. The State should take a series of steps to address and remedy it. **S Ramakrishnaswamy, Chennai**

Annihilate caste

Ref: SC stays UGC fiat (Jan 30). The court's decision that the regulations “will divide society” is erroneous and unfortunate. To allow harassment and humiliation of Dalits, indigenous people and OBC on the ground of caste to avoid “social division” is to confer a judicial sanctity to “sanctified apartheid”. The equity rules are needed to annihilate caste. **G David Milton, Kanniyakumari**

Booze menace

Ref: Search continues for woman's body (Jan 30). Today, through the widespread promotion of alcohol as a source of state revenue, governments undermine the right to lead a dignified life for its citizens. The wellbeing and protection of workers coming from across the country should be prioritised over industrial expansion. **Komala B, email**

India likely to handle AI-led disruption proactively

THE Economic Survey 2026 provides some interesting facts about the growing digital economy of India and its side effects. It also provides a glimpse into how digital technologies like AI are reshaping the country's numerous sectors. The survey pointed out that the mature IT services industry, growing startup ecosystem, and increasing user base of internet-enabled services put India as one of the biggest generators of data. Currently, the country generates around 20 per cent of all global data. But most of the data is stored outside the country as India has only three per cent of global data centres. This creates huge opportunities for creating a vibrant data centre ecosystem in the country. According to the survey, the data centre

capacity is expected to reach about 8 GW by 2030, up from 1.4GW in Q2 of 2025. If realised, this will translate into growth for the real estate sector, electronic equipment manufacturers, power generators in both traditional and renewable space, and public services. Not to mention, such growth will create more jobs in the technology and related segments apart from accelerating the pace of urbanisation. Similarly, the AI wave is likely to benefit the Indian economy in multiple ways, according to the Survey. However, it recommends adoption of AI technology in phases.

The survey pointed out that India is a labour-rich economy and unbridled use of AI in replacing human labour will create social instability. Therefore,

it calls for social mapping of sectors regarding labour displacement that may happen due to AI. It indicates that the government is quietly doing its work of labour displacement mapping in sectors like IT services. Notably, global technology firms have laid off thousands of employees in the last two years as AI adoption makes many jobs redundant. In contrast, the IT industry did not see any heavy layoffs despite AI making serious inroads. Therefore, one can state that the industry and the government are in touch to avoid any large-scale job losses, which could create panic in the industry. Lastly, the Economic Survey highlighted a pertinent threat faced by the Indian society due to internet penetration. For the first time, the Centre

has acknowledged that rapid rise of digital addiction and screen-related mental health issues are being seen due to smartphones, internet, gaming and social media addiction. Mental health issues have especially been prominent among teens. Moreover, social media is creating mental health issues among people, creating negative feelings like inferiority, comparison and loss of self-esteem among others. Owing to such outcome, the survey has recommended introduction of age-based restriction on use of social media. Notably, Australia has already introduced restrictions on use of social media for young people. France is likely to follow suit. Against this backdrop, it should be anticipated that India may

introduce some restrictive measures on unbridled usage of social media in the coming years. Interestingly, the survey also flagged up risks arising from concentration of global LLMs. It stressed on the importance of having technology sovereignty that will be vital for the country's tech ecosystem. Overall, this year's Economic Survey's findings about the digital economy indicate what's up in the years ahead. With India set to hold the Global AI Summit in the coming months, the survey's threshold analysis shows that the government will be proactive in handling the AI wave rather than reacting to its outcomes later. This augurs well for the Indian economy given AI's disruption potential.

LETTERS

Indian economy is not as rosy

ALTHOUGH the Economic Survey has painted a rosy picture of the Indian economy, it is not as rosy and does not sit comfortably with the economic plight of an overwhelming majority of people that they suffer in their daily life. "Bright India", the new name given to the "Shining India", is an illusion or at the most a reality for the upper crust. Suffering will continue to exist if the persistence of poverty and unemployment are anything to go by. The logic of the claim that the rest of the world is not keeping up with India's growth rate while it is home to the largest concentration of impoverished people defies understanding. The contention that India is a bright spot in a world that is getting darker is good only for self-satisfaction. The fastest growing economy does not keep the pot boiling or fill the bellies. It is self-evident that the Economic Survey has deflected scraping of MGNREGA for political reasons.

G David Milton, Maruthancode (TN)

Both India and EU will gain from FTA

WITH reference to the article India-EU FTA is a win-win proposition for both economies (THI Jan 30), I would like to highlight the significance of this historic agreement. The India-European Union Free Trade Agreement is a landmark deal that will take our economic ties to the next level. This agreement is a feather in the cap for both India and the EU, as it will provide a much-needed boost to our trade and investment relations. Indian industries will get preferential access to the European market across 99 per cent of tariff lines, covering 99.50 per cent of trade value. This will be a shot in the arm for our employment-generating sectors like textiles, leather, and footwear. The agreement will also pave the way for increased cooperation in areas like IT and professional services, education, and other business services. The mobility of professionals will become easier, and non-trade barriers are expected to go down. To reap the benefits of this agreement, Indian industries need to gear up and take advantage of the new opportunities. They should focus on improving their competitiveness and quality standards to meet the EU's requirements.

Raju Kolluru, Kakinada

FTA is a good augury

PROPOS "India-EU FTA is a win-win proposition for both economies" (THI Jan). The conclusion of the long-pending India-EU Free Trade Agreement is indeed welcome news. It promises balanced gains—duty-free access for many Indian exports like textiles, footwear, tea, spices and jewellery, while opening our markets sensibly to European cars, alcohol, machinery and services. It also opens doors for deeper cooperation in defence, security, technology and skills. However, the real test begins now. To make the FTA truly beneficial for ordinary Indians, the government must move quickly on implementation. This means streamlining customs procedures, investing in export infrastructure (especially cold chains for agri-products and quality certification for MSMEs), offering targeted support to small exporters facing compliance costs, and closely monitoring sensitive sectors like dairy and poultry to prevent any sudden import surge. Transparent communication with farmers and industry will build confidence. Done right, this pact can create jobs, lift incomes and strengthen India's global standing.

S M Jeeva, Chennai-32

Effective implementation vital for India

PROPOS "India-EU FTA is a win-win proposition for both economies" (THI Jan 30). Finalization of the India-EU FTA is a significant milestone for our economy. While the duty-free access for over 90 per cent of our exports, such as textiles and footwear, is a major victory, the real test lies in ground-level implementation. We must help our small-scale exporters meet stringent European regulatory standards and navigate non-trade barriers. Prioritising technical support for SMEs and improving logistical efficiency will be essential to ensure that this "historic" agreement translates into actual job creation and sustainable growth for the country.

K Sakunthala, Coimbatore-641016

Post-Texas shocker, India must rise like Phoenix

PROPOS "Texas tremor to blight Indians' entry into US (THI Jan 29), Texas Governor and Republican, Greg Abbott dropped a bombshell by freezing recruitment of H-1B Visa holders across public universities and state agencies till May 31, 2027. This will adversely affect Indians as Texas is home to over 41,000 H-1B Visa holders. This wasn't unexpected. A tariff-crash Trump was expected to react explosively to India signing an FTA with the EU to douse the effects of US-imposed tariffs. India, in the meantime mustn't be seen as an alms-seeker. Through Atmanirbhar Bharat and Make-in-India initiatives, the country must rise like the proverbial Phoenix in the interest of national pride and self-dependence. It remains to be seen how America will survive without 'draining' Indian brains, which has contributed significantly to America's prosperity.

Dr George Jacob, Kochi

thehansreader@gmail.com

BENGALURU ONLINE

Real estate firm owner dies by suicide during IT raid

Bengaluru: Real estate entrepreneur and Chairman of Confident Group, CJ Roy, allegedly died by suicide after shooting himself at his office during an Income Tax (IT) department raid in Bengaluru on Friday.

The incident occurred at the Confident Group office located in Langford Town, off Hosur Road. Police from Ashoknagar Police Station rushed to the spot immediately after receiving information and initiated an investigation. The body was later shifted to Narayana Hospital, Anekal, for post-mortem examination.

According to preliminary information, IT officials had conducted a raid at the Confident Group office earlier in the day. CJ Roy reportedly arrived at the office around noon and faced questioning by the officials for nearly an hour.

Read more at <https://epaper.thehansindia.com>

India's growth story needs policy depth, not populism



As India stands on the cusp of its Union Budget for 2026-27, the Economic Survey 2025-26 has set the analytical and policy stage for the nation's fiscal priorities.

It presents a cautiously optimistic assessment of India's economy with a growth projected at 6.8-7.2 per cent and claims that the country remains a global outlier in a slowing world economy.

Meanwhile, the survey also flags structural constraints that could limit medium-term growth if left unaddressed. The upcoming Budget is therefore less about headline populism and more about policy fine-tuning to sustain momentum, manage risks, and deepen structural reforms.

The survey is more than a statistical recitation: it is a narrative of transformation, resilience, and caution amidst persistent global uncertainty. Yet, beneath the headline figures lies a more complex and nuanced macroeconomic landscape — one that requires careful policy calibration in the forthcoming Budget.

It underscores that the economic growth continues to be underpinned by strong domestic demand, particularly robust consumption and sustained investment activity. Private consumption accounts for roughly 61.5 per cent of GDP, a level that rivals some of the highest historical readings. Rural demand remains buoyant on the back of strong agricultural output, while urban consumption is supported by eased inflation

From survey to strategy: India's moment of economic calibration

and wage growth.

This domestic demand cushion has helped insulate India to some degree from faltering global external demand. Still, the macroeconomic backdrop is one of "caution not pessimism" — acknowledging external vulnerabilities while pointing to internal strengths.

Inflation trends have been broadly benign, allowing the Reserve Bank of India (RBI) to maintain a supportive monetary stance. Coupled with improving bank balance sheets — with gross NPA ratios at multi-decadal lows — Indian financial intermediation is relatively well positioned to support growth. Nonetheless, the cost of capital remains a structural concern.

India's high reliance on bank financing and the current tax treatment of debt instruments contributes to a persistent premium on borrowing costs. The survey advocates tax reforms in debt markets — including rationalisation of rates — to deepen corporate access to capital.

Experts claim that fiscal management continues to strike a balance between consolidation and growth-oriented spending. The fiscal deficit narrowed to 4.8 per cent of GDP in FY25, beating targets, and is projected to improve further in FY26. Capital expenditure has risen sharply — more than fourfold since 2018 — and now represents a central plank of India's growth strategy, particularly in infrastructure expansion and connectivity projects.

At the same time, the survey also warns of state-level fiscal pressures, especially rising revenue deficits driven by conditional cash transfers and populist spending, which could crowd out productive capital



As India heads into Union Budget 2026-27, the Economic Survey offers cautious optimism amid global uncertainty. Strong domestic demand and fiscal discipline have kept growth resilient, but structural vulnerabilities—high cost of capital, external risks, state-level fiscal stress, and job creation challenges—persist. This Budget is less about populist announcements and more about policy calibration to sustain growth, deepen reforms, and build long-term economic resilience.

formation.

On the external front, India enjoys robust foreign exchange reserves — covering roughly 11 months of imports — and a comfortable short-term debt position. Though the opposition ecosystem does not agree, the government claims that exports reached record levels enhanced by dynamic services exports, particularly in IT and professional services.

Yet the focus on external vulnerabilities is striking. The rupee experienced depreciation pressures in 2025, partly due to volatile capital flows and geopolitical headwinds. This underscores India's exposure to global financial conditions, and the strategic imperative to deepen trade diversification and reduce external imbalances. The Economic Survey highlights evolving sectoral dynamics offering both opportunities and policy imperatives.

Manufacturing activity has shown signs of structural recovery, with robust growth in

industry GVA and a pickup in capacity utilisation. Initiatives like the Production Linked Incentive (PLI) schemes have catalysed investment across 14 sectors, attracting over 82 lakh crore and generating significant employment. These schemes are central to India's ambition to move up global value chains in electronics, pharmaceuticals, and other high-value industries.

Moreover, India's semiconductor mission has advanced domestic capabilities with projects spanning multiple states — a critical step in reducing strategic technology dependencies.

Services continue to lead the growth trajectory, with sustained high growth in tradable and digitally enabled services. The strength of India's services exports has been a notable macroeconomic stabiliser, contributing to export and foreign exchange resilience. This sector — encompassing IT, finance, and a growing digital economy — will remain a key focus in

the Budget, especially in terms of skills development, regulatory simplification, and export facilitation.

Similarly, infrastructure development is a lynchpin of India's growth strategy. From highways and rail electrification to aviation expansion and renewable energy deployment, the survey maps a transformative thrust in physical capital. High-speed corridors, electrified rail networks, and energy capacity additions are not just growth multipliers but also inclusivity engines across regions.

The survey places novel emphasis on emerging sectors such as space services, where India's market — currently valued at over \$8 billion — is projected to expand manifold over the next decade, driven by private sector participation and technology innovation.

For the first time, a distinct chapter on Artificial Intelligence (AI) and frontier technologies signals the government's intent to integrate technological leadership with economic strategy. Harnessing AI across agriculture, manufacturing, health, and governance could be a decisive differentiator in productivity and competitiveness.

But the budget has several key policy challenges ahead of Budget 2026-27.

Despite positive trends, the survey lays out several policy challenges that the Union Budget must address:

External vulnerabilities and export competitiveness:

The persistence of global headwinds — trade fragmentation, geopolitical risk, and volatile capital — demands a concerted shift towards broad-based merchandise exports and deeper integration into global value chains. Budget measures will need to support export competitiveness through tar-

geted incentives, logistics reforms, and trade facilitation.

It is also essential to reform the tax treatment of debt instruments and expand non-bank financial channels to lower the cost of capital. This would unlock investment — particularly in infrastructure and technology — and reduce over-dependence on bank credit.

With state revenue deficits rising, the Budget needs a framework that balances state autonomy with fiscal responsibility. Encouraging productive capital spending while limiting unproductive transfers remains essential for medium-term debt sustainability.

India's demographic dividend can only be realised through sustained investment in education, health, and skills — especially in underserved regions. Allocations that bridge human development gaps will be vital to unlock long-term productive potential.

A resilient growth path must also align with climate imperatives. Energy transition, sustainable agriculture, and green finance will require budgetary support — both in direct spending and fiscal incentives — to ensure that climate goals are embedded in economic strategy. The rapid expansion in renewables and clean energy capacity needs further policy backing.

Hopefully, the government will balance ambition with realism and ensure that India transitions from a fast-growing economy to a more resilient, inclusive, and globally integrated one. The Budget must balance short-term demand support with long-term capacity building — ensuring that growth is not only sustained but is also sustainable.

(The author is former Chief Editor of The Hans India)

Bharath's rural soul can once again start shaping global commerce

SADINENI YAMINI SHARMA

WHEN we speak of Bharath today, it is often described as a developing nation finding its place in global markets. Yet history tells a different and far richer story.

There was a time when Bharath was not merely participating in world trade but shaping it. Long before modern economic rankings and industrial metrics, this land stood as the economic heartbeat of the world. Around 1700 CE, Bharath accounted for nearly one-fourth of global GDP, making it one of the largest economies of that era.

This prosperity did not emerge from massive factories or centralised production. It was built on a vibrant, decentralised system rooted in villages. Bharath's textiles travelled from Bengal to Europe, its spices transformed cuisines across continents, and its steel, crafts and traditional medicines earned global respect. From the fine muslins of Bengal and the spices of Malabar to the silks of Kanchipuram and the crafts of Rajasthan, villages were not passive settlements. They were active centres of innovation, production and trade. Commerce was not merely an exchange of goods; it also marked movement of culture, knowledge and civilisational values.

From prosperity to disrepair: The decline of this flourish-

ing system did not occur due to any lack of skill or enterprise among Bharathians. It followed colonial interventions that systematically dismantled indigenous industries. Artisans were pushed into poverty, village economies were weakened, and Bharath was reduced from a producer of finished goods to a supplier of raw materials. The most damaging loss was structural: the organic link between village production and global trade was severed. At Independence, Bharath inherited not its historic prosperity, but an economy shaped by distortion and deprivation.

The mother of all trades:

Today, the global economy faces fragile supply chains, environmental stress, rising unemployment and cultural erosion. Ironically, the solutions now being discussed worldwide have long existed in Bharath's villages. This integrated rural economic model can be called the "Mother of All Trades". It encompasses agriculture linked with local food processing, handlooms blending culture with ethical fashion, traditional medicine aligned with global wellness, village crafts supporting sustainable lifestyles, and millets and natural foods reaching health-conscious consumers worldwide.

This model is labour-intensive without being exploitative, productive without harming

the environment, and deeply resilient while creating globally relevant. It balances growth with dignity and efficiency with sustainability.

Why it works:

At its core, this trade philosophy places the human being at the centre of economic activity. Every product carries its identity, heritage and skill of its maker. It respects ecological balance and builds economic strength from the village upward. In today's digital age, technology allows even small producers to access international markets directly, recreating, in a modern form, the connectivity once provided by ancient trade routes.

On the global stage:

As Bharath deepens its global engagement, trade must be measured not only in volumes but in values. Demand for ethical and sustainable products is growing in the United States and Europe. Japan places high value on craftsmanship and authenticity. Africa and South Asia offer opportunities to revive historic trade links and support decentralised development.

Bharath's export future cannot depend solely on software and services. The next wave must include handlooms, millets, Ayurveda, natural fibres, forest produce, rural tourism and artisanal industries—areas where Bharath has both heri-



age and global credibility.

History reminds us that this connectivity once thrived across regions such as coastal Andhra, Madhapatnam, the historic port town, was a major trading centre in the 17th century, exporting textiles and spices to Persia, Southeast Asia and Europe. It was among the earliest locations where European trading companies connected local producers to global markets.

Leadership that understands the world:

Leadership plays a decisive role in shaping trade destiny. Prime Minister Narendra Modi's foreign diplomacy reflects a clear understanding that each country operates within its own economic and civilisational framework. He engages confidently with capitalist economies like the United States while safeguarding Bharath's developmental priorities. Whether through technology partnerships with the US,

manufacturing cooperation with Japan, energy ties with the Middle East or development partnerships with Africa, the guiding principle has been mutual benefit without dependency and engagement without compromising national interest. This approach has helped reposition Bharath from a passive market to a respected global partner.

The Bharathiya perspective:

Without turning trade into ideology, the country can still offer direction rooted in its civilisational wisdom. Bharathiya traditions emphasise balance—between individual prosperity and social good, consumption and conservation, markets and morality. Applied to trade, this means growth that uplifts the smallest producer, exports that protect the environment, and business models that strengthen communities. Globalisation is not rejected; it is humanised.

National reconstruction:

Revealing rural trade is not nostalgia; it is strategy. Strong village production reduces distress migration, increases women's participation, encourages entrepreneurship, diversifies exports and builds cultural confidence. This is more than economic development. It is national reconstruction grounded in economic self-belief.

The future rises from the roots:

Bharath does not need to replicate the industrial excesses of the last century. The world is now searching for sustainable, humane and culturally rooted economic models. The country's rural trade ecosystem offers exactly that. When villages prosper, Bharath becomes stable. It becomes a trusted global partner. And when trade is guided by human values, prosperity is shared rather than concentrated.

That is how Bharath can once again lead the world—not through dominance, but through example.

When its villages connect to the world, trade becomes more than commerce; Bharath becomes a bridge between livelihoods, culture and global prosperity.

(The writer is BJP National Council member and spokesperson)



FOR THE PEOPLE

Free Press
FOR FREE FLOW OF TRUTH

No backdoor entry to quotas

The issue of changing one's faith to benefit from the reservation system has become the subject of a Supreme Court case again, with the bench asking the Haryana government to explain how minority certificates are issued to those claiming to have converted. The petitioners, originally belonging to the Jat community in Haryana, wanted the court to issue orders to admit them into the Buddhist minority category in a post-graduate medical course in Uttar Pradesh, on the strength of certificates issued by a Sub-Divisional Officer identifying them as Buddhist. In oral observations, Chief Justice of India Surya Kant, who was on the bench with Justice Jyotsna Bagchi, deprecated what appeared to be a fraudulent attempt to claim a minority benefit through conversion when the petitioners were originally from a prosperous, landed community in the state. Haryana's government must now explain the norms adopted by the SDO to issue a certificate and whether a candidate who appeared in the qualifying NEET PG examination in the general category could subsequently use conversion to press a claim for a minority seat. Such questions, which surface periodically in the context of attempts to exploit quotas for education and employment, highlight the conundrum: how can governments reconcile the conflict of limited opportunities available for society as a whole with constitutional quotas for historically deprived communities?

A future-focused policy should expand public education to cover everyone and not parcel out identity-based benefits

There have been other cases earlier involving converts to Christianity from Hinduism being denied reservation benefits, since they no longer belonged to historically deprived sections. In the case of a woman who claimed Scheduled Caste identity in Puducherry but whose father had converted to Christianity and sought an SC certificate as a practising Hindu, a bench of Justices Pankaj Mishra and R. Mahadevan ruled in 2024 that accepting such a claim made purely for reservation benefit would amount to a fraud on the Constitution. It would also go against the very object of reservation. Today, the debate on quotas has acquired a new momentum against the backdrop of major political parties calling for a caste census and the Union government, after initial reluctance, favouring it in the upcoming national census. Making economic backwardness a separate reservation category is now part of the mainstream discourse after an SC bench majority order upheld the 103rd constitutional amendment, introducing a 10% EWS quota. With an expanding quota system, the incentive to find a place in one or the other group is stronger; the apex court took the view that the 50% cap on reservation can be breached. At the root of the pressures, however, is systemic failure to deliver capability-building education and skills, buttressed by good health, to millions. A future-focused policy should expand public education to cover everyone and not parcel out identity-based benefits.

Eco survey: Devil is in the details

India's Economic Survey 2025-26 laid before Parliament yesterday, while projecting a GDP growth of 6.8 to 7.2 per cent in FY27, keeping India among the fastest-growing major economies, also came with caveats—geopolitical tensions, trade fragmentation, rising protectionism, and rapid technological change that may upset India's growth story by reshaping how capital moves and how supply chains function. For India, this means weaker external demand and unpredictable investment flows, even if domestic fundamentals remain strong. Volatility alone, the survey warns, could put downward pressure on the rupee. One scenario looms particularly large: a low-probability but high-impact artificial intelligence shock—an AI-driven disruption severe enough to rival or surpass the 2008 financial crisis. The concern is not simply automation in factories, but automation of cognitive work, such as coding, data analysis, customer support, and back-office functions, which, for India's massive IT and BPO sector, could translate into significant white-collar job losses unless reskilling and adaptation happen at scale. Other external risks are quieter but persistent—Trumpism means tighter immigration policies in advanced economies—which could well reduce remittances, long a stabilising source of foreign exchange.

At the same time, global financial tightening cycles could trigger sudden reversals in capital flows. On the home front, the survey is unusually candid about the rise in state-level fiscal populism, particularly cash-transfer schemes funded by expanding deficits. While politically popular, such measures risk raising overall borrowing costs and weakening macroeconomic stability. The survey also admits that manufacturing, where India wants to come near China, faces structural bottlenecks. High energy prices, expensive freight, and weak logistics create inverted cost structures that erode competitiveness. Without deep reforms in these areas, policy wish lists alone will not deliver results.

Human capital emerges as another constraint. Skill mismatches persist across sectors. Women's labour force participation remains low. Even public health enters the economic frame, with rising obesity levels and 'digital addiction' among the young flagged as a long-term threat to productivity. The demographic dividend, the survey suggests, is not automatic; it needs to be engineered. Perhaps the most consequential line in the document is its call for an 'entrepreneurial state', not for a larger government but for a more capable one, that is able to coordinate across ministries, update regulations quickly, and remove procedural choke points. Outdated governance rules, the survey warns, risk locking India in stagnation. Climate action illustrates the dilemma. India's green ambitions are real, but financing and technology flows from advanced economies remain inadequate. Without international support, decarbonisation becomes far more difficult to sustain politically and financially. The survey, ultimately, sketches an India that is strong but not invulnerable, ambitious but constrained, and poised but unfinished.



Comment

A. L. CHOUGULE

The Union Budget is the backbone of governance in a large and diverse country like India, where economic disparity varies considerably from one region to another and from one state within a region to another. The budget outlines how the government plans to raise and spend public money in a financial year; crucial for converting policy promises into action and managing finite resources to drive economic growth and social welfare. However, beyond tax changes and spending announcements, the budget document is never only about economics. The political dimension of a budget can never be ignored. Precedents indicate that fiscal priorities are influenced by elections or other considerations to send a clear message to the electorate.

Because the political dimension has a significant correlation to the annual accounting exercise, this year's budget, scheduled for Sunday, will be closely watched for signs of targeted allocations or policy incentives for four states going to polls in the next few months—Tamil Nadu, West Bengal, Kerala, and Assam—even as the government stresses fiscal discipline and the Viksit Bharat story. Except for Assam, the other three poll-bound states have non-NDA governments. Political observers and analysts do not rule out electoral compulsions

for the finance minister to announce targeted inducements for these states or signal responsiveness to regional demands, though prudence and not populism should be the underlying theme of the budget.

In recent years, the central government has been accused of overtly using budgetary signalling to influence poll narratives. For example, the interim budget in 2019 read like the BJP's election manifesto for the Lok Sabha election two months later. Another prominent example is Bihar, which went to polls in November and was a centrepiece of last year's budget in July—support for agriculture, tourism circuits, and infrastructure corridors. While political incentives or poll-driven 'sops' cannot be ruled out entirely, economic experts stress that the government will be under pressure to manage the fiscal deficit at around 4 to 4.5 per cent of the GDP. This implies that the scope for election-driven largesse devoid of economic justification will be limited. This will require measured expansion in capital outlay, rather than headline-grabbing handouts.

It will be interesting to see whether politics dominates over economics amid the continuing economic uncertainty driven by global headwinds and Donald Trump's trade war and the delay in the India-US trade deal. Therefore, what should be looked out for in

the budget is whether Union finance minister Nirmala Sitharaman announces new development measures for West Bengal and Kerala, where the promise of ushering in an era of rapid development, which will go well with the government's Viksit Bharat narrative, becomes the BJP-led NDA's major poll issue. For, stressing the message of 'double engine' government will help the BJP increase its vote share in Kerala and bolster its chances in Bengal.

Tamil Nadu is somewhat a different case. It is the second largest state in terms of the GDP, trailing Maharashtra with strong industrial output and a 9 per cent contribution to the national GDP. It also ranks high in per capita income. But politically, the Hindu party is on a weak footing in both Tamil Nadu and Kerala, though its influence has been steadily growing. In West Bengal, the BJP has emerged as the main political opponent to the ruling TMC after its impressive performance in the 2019 Lok Sabha poll and the 2021 assembly election. Bengal is a state where the BJP has been expending a lot of political capital over the past decade, hoping to form its maiden government there. But the TMC has so far given a determined fight to ward off the BJP. Portraying the BJP as an 'outsider' while accusing the centre of 'punishing' the state by choking financial resources, TMC Chief Min-

ister Mamata Banerjee has been playing the local card quite well. A tit-for-tat street fighter, Mamata is no pushover, though she is fighting anti-incumbency for a fourth straight term. An announcement of a few big social and infrastructural projects could help the BJP set the narrative of development because of the 'double engine' government in Bengal. But still, it is going to be a tough walk for the BJP to dislodge the TMC from power. In Assam, however, the BJP has already been in power for the last 10 years, and it may not need big project announcements to retain control over the state, where the Congress-led opposition seems unlikely to pose a strong threat to the BJP's dominance.

Both Bengal and Tamil Nadu have vibrant political landscapes and strong regional identities. In the lead-up to the elections in both states, political experts expect intensification of welfare programmes by respective state governments that could have bearing on the poll outcomes. In Kerala, fiscal constraints because of high debt and social commitments may prevent the state government from loosening its purse strings on poll-driven populist measures. But then the BJP is a fledgling political player in Kerala, though the central incentive might influence an improvement in its vote share. As for Assam, with significant central assistance already in place with flag-

ship schemes, experts expect the Union budget to fine-tune central incentives according to regional priorities.

Over the years, subsidies and welfare schemes have played a key role in state politics, with the Union budget setting the narrative during election years. That tradition is unlikely to be broken on February 1, as the budget will be presented well before the model code of conduct kicks in. Despite the recurring debate over the blurred boundary between genuine welfare and 'freebies', economic policy remains inseparable from political strategy. Considering the turbulent relationship between the BJP-ruled centre and the three poll-bound non-NDA states, Budget 2026 offers the centre multiple levers to soften its image in these states, particularly Bengal, where the language of 'dues', 'funds', and 'rights' under fiscal federalism dominates everyday conversation.

Given the importance of the assembly elections for the BJP, and considering that fiscal policy is not merely economics but also an electoral terrain, it would not be a surprise if the budget features a slew of promises and scheme enhancements for the poll-bound states, besides project-linked funding and infrastructure support.

The writer is a senior independent Mumbai-based journalist. He tweets at @ali_chougule



Guest Column

KIRTI JOSHI

India stands at an important stage of its economic journey as the Union Budget 2026-27 is set to be presented. At a time when the country is steadily strengthening its position in the global economy, this budget carries high expectations from both individual taxpayers and the business community. The vision of a Developed India can be achieved only when policy decisions place agriculture, youth, and the middle class at the center, while simultaneously encouraging capital expenditure, skill development, innovation, modern technology, and emerging areas such as artificial intelligence. These elements are essential for sustaining long-term growth in GDP and productivity.

Tax policy plays a crucial role in economic development. The expectation from Budget 2026-27 is that it will introduce fiscal and tax measures that protect the economy from global uncertainties, enhance cost competitiveness, and provide long-term stability to taxpayers and industries. Some of the key expectations relating to personal and corporate taxation are discussed below.

Increase in Standard Deduction
At present, salaried taxpayers are allowed a standard deduction of Rs 75,000. There is a strong expectation that this limit will be increased to Rs 1,00,000. A higher standard deduction would directly reduce taxable income,

lower the tax burden, and increase disposable income in the hands of taxpayers. This, in turn, would boost consumption as well as savings.

Optional Joint Income Tax Return for Married Couples

Currently, income tax is levied on an individual basis, requiring married couples to file separate returns even though household income and expenses are usually shared. In single-income families, the entire tax burden falls on one spouse, while the basic exemption limit of the other spouse remains unused.

To address this imbalance, there is an expectation that Budget 2026-27 may introduce an optional joint income tax return system for married couples. Such a facility should be voluntary, allowing taxpayers to choose between the existing system and the joint return option. This would reduce the overall tax burden on families and enhance their purchasing power.

Separate Perquisite Valuation for Electric Vehicles

Under the current rules, the taxable value of a company-provided motor car is determined based on engine capacity. With the growing adoption of electric vehicles, it is expected that a separate and simpler perquisite valuation mechanism will be introduced for employer-provided EVs. This would further encourage the use of

environmentally friendly transportation.

Extension of Time Limit for Revised and Belated Returns

At present, revised or belated income tax returns can be filed only up to 31 December. In cases involving tax audits, foreign income, or foreign tax credits, correct information often becomes available at a later stage, leaving insufficient time for compliance. Extending the time limit for filing such returns would improve accuracy and overall tax compliance.

Home Loan Interest Deduction under the New Tax Regime

The new tax regime does not currently allow a deduction for interest on home loans for self-occupied properties. Considering rising housing costs and the needs of the middle class, there is a strong expectation that interest on home loans for self-occupied houses should also be allowed as a deduction under the new tax regime.

Extension of Concessional Tax Rate for New Manufacturing Companies

Section 115BAB of the Income-tax Act provides a concessional tax rate of 15% for new domestic manufacturing companies, subject to commencement of production within a specified

time period. Since manufacturing projects often require longer gestation periods, it is expected that the deadline for starting production will be extended to 31 March 2029. This would provide a significant boost to the Make in India initiative and encourage fresh investments.

Reduction in Tax on Dividends of Domestic Companies

Under the current system, corporate profits are taxed at the company level and dividends are again taxed in the hands of shareholders, resulting in double taxation. To reduce this burden, it is expected that the maximum tax rate on dividends distributed by domestic companies may be capped at 20%.

Amnesty Scheme for Old Disputed Tax Cases

In the initial years of GST implementation, the complexity of rules led to several small disputes that are still pending. An amnesty scheme offering relief from interest and penalties for such cases would reduce litigation, ease the burden on both taxpayers and the tax department, and improve revenue collection.

Rationalisation of Income Tax Slabs

The income group earning between Rs 12 lakh and Rs 20 lakh cur-

rently faces the highest tax pressure. This segment not only pays taxes diligently but also invests and drives economic growth. There is a strong case for widening tax slabs. In particular, the highest tax rate of 30%, which currently applies from an income of Rs 24 lakh, may be extended up to Rs 30 lakh. This would provide meaningful relief and enhance spending capacity.

Increase in Exemption Limit for Long-Term Capital Gains on Equity

Participation of the middle class in capital markets through mutual funds and SIPs has increased significantly. However, the exemption limit for long-term capital gains on equity remains restricted to Rs 1.25 lakh. Increasing this limit to Rs 2 lakh would provide a major incentive to small and medium investors and strengthen the culture of long-term investing.

The objective of tax reforms should not be limited to revenue collection alone. A balanced and fair tax system empowers citizens and promotes economic stability. When taxpayers have higher savings and disposable income, the positive impact is reflected in higher consumption, increased investment, and overall economic growth.

The writer is a chartered accountant based in Indore

LETTERS TO THE EDITOR

Healthcare Appeal

Punjab's ₹10 lakh cash-less health scheme is commendable. With high out-of-pocket medical expenses nationwide, Tamil Nadu and other states should adopt similar welfare-driven healthcare models for inclusive governance.

A.P. Thiruvadi, Chennai

Rupee Woes

The rupee's sharp fall, rising crude prices and global uncertainty reflect economic stress. RBI intervention has prevented worse damage, but policy focus must shift from elections to stabilising the economy and restoring investor confidence.

Tharcius S. Fernando, Chennai

Know When To Exit

Astronaut Sunita Williams' willingness to pass

the torch contrasts sharply with Indian politicians clinging to power. Leaders should learn when to step aside and nurture successors.

P.G. Menon, Chennai

Opposition Failure

India's opposition suffers from inconsistency, appeasement politics and lack of governance focus. Disruptions and blame games weaken credibility, helping BJP dominate elections. Constructive opposition is essential for democracy.

Sravana Ramachandran, Chennai

Railway Discipline

Unreserved passengers occupying reserved coaches inconvenience genuine ticket holders. Railways must strictly enforce compartment discipline and empower TTEs

to act firmly.

S. Sankaranarayanan, Chennai

TVK Silence

With alliances forming ahead of TN elections, TVK's lack of visible political engagement raises concerns. Silence, limited outreach and delayed strategy risk reducing the party to a spoiler rather than a serious contender.

B. Krishnanth, Chennai

RTE Enforcement

The Supreme Court's push for 25% EWS reservation in private schools is vital. Strong enforcement, grievance redressal and incentives are needed to reduce educational inequality and fulfil NEP goals.

Prasun Dutta, West Midnapore

Do we need Guvs?

Of late, governors in non-

BJP-ruled states are refusing to read speeches prepared by CMs, especially if they include criticism of the BJP government at the centre. The aforesaid scenario has been observed mainly in the states of Tamil Nadu and Kerala, which is a poor reflection of our democracy and hence needs to be avoided in the future. Political parties must collectively decide whether there is any need for governors in the country.

Satish Murdeshwar, Pune

It's destiny

Destiny is cruel. Ajit Pawar wanted to take over from Sharad Pawar, as the latter was old and needed to retire, so the former broke the party into two and took over the latter's organisation, symbol, and party workers. Sharad Pawar is still alive, while Ajit Pawar is no more.

Biju Cherian, Mumbai



India-EU trade deal

The conclusion of the Free Trade Agreement between India and the European Union is an important landmark in the bilateral relations between two of the world's largest economies. The agreement opens up a new chapter in India's engagement with the European Union. A significant aspect of the deal is the reduction in tariffs across a large spectrum of goods. It took more than 15 years of negotiations for India and the European Union to finalise the deal, and one hopes that the agreement will redefine India's economic trajectory in the coming years.

Devendra Khurana, Bhopal

THE ASIAN AGE

31 JANUARY 2026

Like in 1991, will FM set a transformative path?

Every Indian may not understand the financial jargon that finance minister Nirmala Sitharaman would use when she presents her ninth Budget in the Lok Sabha on February 1. Similarly, an average citizen may not understand the import of the falling rupee or the ebbing US dollar flow. One thing that every Indian, however, would understand is that gold and silver — which are intrinsically connected to the ritualistic lives of most Indians — have become unaffordable. As a result, every Indian knows that "all is not well" and would have their eyes set on Ms Sitharaman.

The finance minister, therefore, carries a huge burden of navigating the country and its economy through unprecedented global financial uncertainty. When the world is in flux, India cannot remain aloof. The country needs to make hard choices. This Budget, therefore, may not be popular in the traditional sense, as it may not offer anything substantial in terms of savings to people or companies. However, Ms Sitharaman could lay the groundwork to extricate India from dependence on foreign countries for strategic products such as energy, electronics and defence equipment.

Imported fossil fuel has always been one of the major causes of financial distress for India. Though India achieved self-sufficiency in food through the Green Revolution, the world's most populous nation is dependent on other countries for commuting, which is the country's biggest vulnerability. The Budget could focus on rolling out another green revolution in energy to reduce this external dependency.

Another area of concern is electronics, which has become one of the major consumers of foreign exchange. However, the Indian manufacturing sector must become efficient to achieve self-reliance in electronics, especially in semiconductors and rare earths. Though it may seem difficult on the surface, the Indian automobile sector achieved this long ago. All that India needs is some big electronic players and a concerted effort involving government, industry and academia. The Budget could have something on this front.

Imported defence equipment is another pain point for India. The country is still dependent on other countries for key components of weapons systems, which keeps India hostage to foreign powers. The finance minister may take steps to further indigenise the manufacturing of defence components.

The Russia-Ukraine war and the US capture of Venezuela President Nicolas Maduro showed how drastically technology has altered war. If India is not to be left behind in this race, the government should incentivise private companies to spend on research and development. Apart from this, Indian Institutes of Technology (IITs) should be nudged to become research hubs rather than factories that mass-produce engineers for the world. Ms Sitharaman's current Budget, therefore, should no longer focus only on the upcoming financial year; it should be path-breaking — something that posterity remembers in the same vein as the 1991 Manmohan Singh Budget. The Budget should take steps to make the country self-reliant and competitive, and not have a narrow-minded focus on polls or votes. It is time for the Budget to display a true sense of patriotism.

War & peace prize for Trump?

If there were to be a Nobel Prize for war and peace — with due apologies to Leo Tolstoy — there would be no contest as the US President Donald Trump would walk away with it. The avid claimant for the Nobel Peace Prize may have been disappointed with the decision of the Swedish committee last year, but he has carried on in his uniquely Trumpian style of threatening wars on one hand while pleading for peace on the other.

Mr Trump's latest initiative in imploring for a week's ceasefire in the harshest and coldest part of the northern winter may have had a positive response from the Russian President Vladimir Putin who may have agreed not to bomb Ukrainian cities so that the shivering people do not suffer more during power outages. We only wish Mr Trump's word on this, but it does appear as if his humanitarian plea may have found a sympathetic ear after all.

If Mr Putin desists from hitting Ukrainian urban centres for a while, it might just suggest that he may not be averse to agreeing sometime soon for longer pauses in the Ukraine war that is just weeks short of four years now. A man who had agreed to the ceasefire should not be allowed to begin studies in all circumstances, except for certain types of medications, by merely alerting the CDSCO online. The health ministry claims that this modification will save at least 50 days. Care must be taken that companies do not take undue advantage of the loosening of rules.

With someone else's Nobel Prize in hand, Mr Trump has kept himself busy ruminating over Pentagon options for attacking Iran with missiles from aircraft carriers, destroyers, combat ships and aerial bombers positioned in waters off Iran. However, Iran seems to have weathered the first wave of protests but, according to estimates, taking more than 5,000 lives. It is believed the US President is giving his chance to the first chance to bring Ayatollah Ali Khamenei's men to the table before letting his armada display their attack prowess, with the aim of keeping Iran off enriching its nuclear fuel resources further and also in solidarity with the protesters who seek to bring the regime to an end. And what could be more apt than a war and peace prize for the leader who has kept the world on edge as he alternates between waging war and talking peace.

THE ASIAN AGE

KAMRISH MITTER

Editor

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K. SHANKAR

Principal Publisher

Farukh Dhandy
Cabbages & Kings

As ex-Tory Suella comes 'home' to Farage's Reform, will exodus start?

"The base Indian, threw away a pearl More precious than all his tribe" The hard meant the jewel was a girl But why does an Indian suffer this jibe? And yes, in these lines the metaphor is mixed No tribe in this world ever had a price But metaphors by appreciative readers' minds are fixed As poets cast infinitely numbered dice."

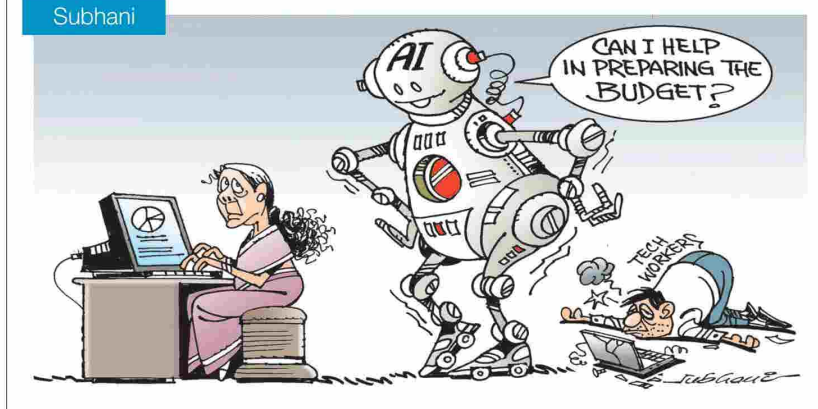
— From *Seen Twice on the Double-Decker*, by Baschchoo

Last week's column had contained the speculation that Suella Braverman of the Conservative Party would be one of the greasy-arsed-slipperies who defect to Reform. It came to pass. The nation watched as Nigel Farage, Fuhrer of Reform, on the stage of some packed Reform Party occasion summoned her, and Cruella appeared to applause, embraced Farage and then she went into a vicious diatribe denouncing the party that she had abandoned as liars and deceivers.

She then went up to the grinning Farage and placed her head on his shoulder in a photogenic embrace, facing the cameras. Nigel looked like an imbecile infant who had been gifted a new, albeit ugly, teddy bear. Yukkk!

Go back to when Cruella was a Tory home secretary.

Subhani



Trump on rampage: For US, costs are piling up

Indranil Banerjee

US President

Donald Trump

has emerged as

the single most

disruptive force

in American and world

politics. Like many

strong leaders of the

past, he wishes to

shape the world

according to his

personal vision, using

raw power. Unrestrained

by considerations

of ideology, ethics or

costs, he is redrawing

political and strategic

equations by the use of

force, economic

coercion and intimidation.

The bigger question is

whether the tactics of

yesterday will work in

today's complex and

far more evolved world.

There was a time not

so long ago in history that

the exercise of raw power

offered immediate and

overwhelming rewards.

The Portuguese sailed into

the Indian Ocean towards

the far end of the 15th

century and proceeded to

displace the Arabs, and

every other maritime and

littoral power, with

unprecedented ferocity,

thereby ensuring for

themselves an unchallenged

writ over the eastern

oceans for well over a

century. They were only

ousted by the British more

than a century later, who

used similar uncompromising

power to reduce the

Portuguese to a shambles

and took over the world's

oceans for themselves.

Unabashed power worked

in geopolitics as well as in

domestic situations.

Napoleon Bonaparte was

among the most prominent

world rulers to demon-

strate that unbridled

power could force political

outcomes, and provide

legitimacy sans consent.

The notion that power and

not ideology could deter-

mine political outcomes

was further reinforced by

Otto von Bismarck, the

"Iron Chancellor" of

Prussia. Their strategy

worked — Napoleon cre-

ated the largest French

empire in history while

Bismarck unified

Germany but at a terrible

cost — a quarter million

deaths due to Bismarck's

war and an estimated

seven million soldiers and

civilians dead in the pur-

suit of Napoleon's quest for

power. Great powers could

do as they wished and lead-

ers who believed in the

strength of raw power usu-

ally prevailed. President

Trump seems to have

taken a page from their

philosophy. But the costs

are rapidly piling up, and

outcomes looking increas-

ingly ambiguous.

Perhaps the worst affect-

ed by his policies is

America itself. Having

vowed to crack the country

of the menace of unchecked

and rampant illegal im-

migration, the President

decided to unleash military

force to tackle the problem.

Soldiers, patrolling the

streets of American cities

seemed to confirm the

most nightmares of citi-

zens who now found them-

selves in a dystopian world

as predicted by doomsday

visionaries.

Thousands were pulled

out of their homes, arrest-

ed and untold numbers

deported. When ordinary

Americans began to

protest, they found them-

selves becoming the targets

of Mr Trump's soldiers.

Many of these Americans

are those who supported

anti-immigration policies

aimed at removing the es-

timated 11 million illegals

in the country, but found

the tactics to resolve it re-

prehensible. President

Trump had warned before

his election that illegals

grants "will be removed as

fast as they come in,"

and yet specifying how

exactly this would be done.

Outrage erupted follow-

ing the killings of two inno-

cent US citizens — Alex

Pretti and Renee Good —

by federal agents this

month. In the rising polit-

ical storm that followed,

even many Republicans

and former supporters of

President Trump were con-

cerned. A number of of-

ficials spearheading the anti-

American politicians

can sense a

groundswell against

the President's

policies and many

analysts predict that

Mr Trump and his

party could face a

route in the next

mid-terms scheduled

for November this year

November this year. And

anti-immigration is not the

only reason. The good

times promised by

President Trump are yet to

materialise and the US dol-

lar, like consumer confi-

dence, have hit historic

lows. The currency has lost

more than 10 per cent of its

value since Mr Trump took

office for a second time

and, according to a Reuters

report, consumer confi-

dence has "slumped to the

lowest level in more than

11-1/2 years in January

amid mounting anxiety

over a sluggish labour mar-

ket and high prices, which

could see households

becoming more cautious

about spending."

In foreign affairs too,

President Trump's boasts

about being the Big Daddy

of the world do not seem

to be materialising. His

promise to end the Ukraine

war within days of moving

into the White House has

proved to be a washout and

the bullying of his

European allies has sent

them scurrying to clinch

new alliances around the

world, including with arch-

enemy China.

Venezuela might have

lost its President but the

country has not quite fallen

into Mr Trump's pocket.

US oil companies are

anything but thrilled about

"taking over" that coun-

try's oil sector.

Canada, once the closest

US ally, now talks about a

rupture in the world order

and the fading new friends.

Greenland finds a new

predator while Europe

recoils in horror. An

American armada is mov-

ing threateningly towards

Iran with no clear ob-

jectives and the possibility of

a nightmare war that could

change the Middle East for-

ever.

If Donald Trump indeed

wished to be another

Bismarck, he might have

got it all wrong. Power is

much more diffused in

today's world, and aware-

ness is all pervading.

Moreover, American

power is long past its peak.

Big Daddy could end up

like another Humpty

Dumpty if he doesn't get

the wall.

The writer is an independent commentator on political and security issues

LETTERS

MOVE BEYOND OPTICS

Shashi Tharoor's public insistence that "all is good" within Congress may ring hollow, but it serves a strategic purpose ("Tharoor plays down rift buzz after meet with Kharage, Rahul", Jan. 30, 2026). With Kerala polls approaching, internal discord must be masked to preserve voter confidence. The party's top brass, however, should reflect on why such pretences are necessary. Their opaque handling of dissent and selective engagement with state leaders has bred avoidable speculation.

Tharoor's conciliatory tone after meeting Kharage and Rahul Gandhi suggests tactical restraint, not genuine resolution. His loyalty is evident, but the leadership's reluctance to address underlying tensions risks alienating key voices.

K. Chidanand Kumar
Bengaluru

RELIEF TO DRUG MAKERS

THE GOVERNMENT has relaxed the criteria for approving the development of new medications. To address this, the rules for new medications and clinical trials were revised in 2019. The goal is to shorten the time required to test new medications and promote related research. Previously, such operations required a licence from the Central Drugs Standard Control Organisation. Companies will now be allowed to begin studies in all circumstances, except for certain types of medications, by merely alerting the CDSCO online. The health ministry claims that this modification will save at least 50 days. Care must be taken that companies do not take undue advantage of the loosening of rules.

Ashijit Roy
Jamshedpur

SHIFT TOWARDS EQUITIES

THE ECONOMIC SURVEY 2026 has highlighted a significant shift from our traditional savings culture toward equities. In absolute terms individual investor holdings have risen to ₹84 lakh crores in FY14, a 10X spike — even as deposits fell from 38 per cent in FY12 to 25 pc in FY22. The data points to diversification, not abandonment: deposits still dominate, but equities are being laid on top. Uncertainty lingers over low real deposit returns, asset inflation and anxieties over employment and retirement, nudging households toward higher-yielding assets. Equity participation is being shaped as much by aspiration as by anxiety.

R. Narayanan
Navi Mumbai

Nigel Farage says he accepts these defectors to Reform as his party

Trump wants a 'Hot Hot Hot' economy



KENNETH ROGOFF

If there is one song that captures President Donald Trump's vision for the US economy in 2026, it is Buster Poindexter's 1987 cover of Montserratian musician Arrow's *Hot Hot Hot*, with its line about "party people all around me." That, at least, was the unmistakable vibe emanating from Mr Trump's entourage at the World Economic Forum's annual meeting this month.

Mr Trump and his team arrived in

Davos with a bullish message. Massive fiscal stimulus — both continuing and newly proposed under the administration's One Big Beautiful Bill Act — will soon be reinforced by a sharp increase in defence spending and possibly even a fresh round of Covid-19 style \$2,000 checks for most Americans. Joe Biden-era regulations will be rolled back aggressively, and a new Federal Reserve chair, chosen for his willingness to deliver multiple interest-rate cuts, will be installed.

Taken together, we were told, these policies will push US gross domestic product growth to 4.5 per cent, perhaps even 6 per cent. Better still, inflation will continue to fall, mortgage rates will decline, and everyone will live happily ever after. While this scenario is not impossible, it is highly unlikely. Artificial intelligence (AI) may boost US productivity, though only at the modest annual rate of around 0.5 per cent.

Similarly, deregulation can generate meaningful short-term gains, and Europe could certainly benefit from more of it, as Mr Trump emphasised repeatedly at Davos, when he wasn't hurling personal insults at European leaders. But these supply-side effects fall well short of what would be needed to raise near-term growth by several percentage points.

Conversely, unleashing massive fiscal stimulus on an economy, especially one in which labour-force growth has been curbed by restrictive immigration policies, is inevitably going to push demand beyond supply, stoking inflation. In such an environment, long-term interest rates are more likely to rise than fall as investors seek compensation for inflation risk. Barring a major negative shock, the surge in demand will boost short-term growth, but inflation is notoriously "sticky." Firms and households revise their inflation expectations

slowly, and because prices are not adjusted simultaneously, competitive pressures limit how quickly any one business can respond. Contrary to popular belief, even hyperinflation typically takes years, not months, to develop.

That said, if Mr Trump and his new Fed chair prioritise rapid growth over price stability, inflation is likely to linger near a 1 per cent and tilt towards 4 per cent by late 2027 rather than fall to 2 per cent, as the International Monetary Fund projected in the latest update to its World Economic Outlook.

Of course, a major negative shock — a new pandemic, a financial crisis, or more plausibly, a stock-market correction — could derail this high growth, high-inflation scenario. And a cyber conflict or full-scale war that leads to a surge in defence spending on top of an already overheated economy would be even more destabilising. Given how unpopular inflation is with

voters, why is Mr Trump willing to take this risk? Perhaps he genuinely believes that the supply-side gains from AI and deregulation will be enormous, while the supply-side costs of his tariffs will be minimal, allowing output to expand enough to meet higher demand. If so, his more pragmatic economic advisers should have pushed back.

One suspects, however, that Mr Trump understands perfectly well what happens when demand persistently outpaces supply and believes the prospect of a short-term economic boost ahead of November's midterm elections is worth the risk. From his perspective, inflation may be politically damaging, but an overwhelming Democratic victory that impedes his ability to impose his agenda would be far worse.

To be sure, the US economy performed very well during Mr Trump's first year in office, and he is clearly not faulted for boasting about it. But his claims — most notably his oft-repeated claim that he inherited a "terrible" economy from Joe Biden — are wildly exaggerated. When he spoke at Davos last year, during the first week of his second

presidency, America's dynamism was already the envy of the world. That success did not materialise overnight.

Despite the economy's strong performance in 2025, which is likely to continue in 2026 (maybe even becoming red hot), it is hard to escape the conclusion that over the medium term Mr Trump's decisions over the past year will expose the US to massive risks, including inflation, market volatility, and accelerating decline in dollar dominance. These include his expansionary fiscal policy, attempts to bully the Fed into cutting interest rates, and rapid financial deregulation — not to mention his blatant corruption and repeated abuses of executive power.

Centuries of experience across dozens of countries suggest that the kind of heterodox experiment now underway in the US rarely ends well in the long run. To borrow once more from *Hot Hot Hot*, a "fundamental jam" is all but assured.

The author is professor of economics and public policy at Harvard University. ©Project Syndicate, 2026

ILLUSTRATION: BINAY SINHA



NCPs after Ajit Pawar

PLAIN POLITICS
ADITI PHADNIS

Time and again, Maharashtra's tallest leader, Sharad Pawar (85), has announced he wants to retire from politics. The last time was in November 2024, during the Maharashtra Assembly elections. Campaigning for his great nephew Yugendra, who was a candidate from his party, the Nationalist Congress Party Sharad-chandra Pawar (NCP-SP), from Bara-mati, Mr Pawar spoke to voters as if addressing his extended family. "I am not in power... and my tenure in the Rajya Sabha has one and a half years left. (After that) I will not contest any election in the future. (I) will have to stop somewhere..." he said, thanking the voters of Bara-mati for electing him as their representative, for the Lok Sabha and the Assembly, 14 times.

To this, Ajit Pawar, his nephew and NCP candidate against Yugendra, said: "People should stop reaching a certain age... but some are not ready... even after turning 80, this person... who was never in doubt whom he was referring to is not ready to retire."

Never one to turn the other cheek, Mr Pawar's response was robust. "Na tired hoon, na retired hoon." ("I am neither tired nor retired")

he retorted. "Who are they to tell me to retire? I can still work."

Now, Ajit Pawar is no longer on the scene. Having become a member of the Bharatiya Janata Party-led (BJP-led) alliance Maharashtra, which is in power in Maharashtra, with the rank of deputy chief minister but dis-

appointed with the limits to political growth, he was reportedly negotiating a return to the family bosom before he died. We will never know how far the merger negotiations had progressed. But this much is clear: In the absence of his nephew, the responsibility of running the NCP estate — which is considerable — may once again devolve on the patriarch, Sharad Pawar.

Party members in the Sharad Pawar faction of the NCP have three options: They can persuade the senior Pawar to negotiate a merger, in which case some existing positions will be threatened, but it will be a smooth transition into the Mahayuti — and power. The next round of elections in Maharashtra (once the current Zilla Parishad polls are over) is not until 2029.

Ajit Pawar's position in the council of ministers is now vacant and Sports Minister Manikrao Kokate from his stable resigned in December after a criminal conviction. Ajit Pawar held the finance portfolio and the Maharashtra Budget needs to be tabled in March. It is unlikely that a new finance minister can be appointed so quickly and this job will likely fall to Chief Minister Devendra Fadnis. But two positions in the Council of Ministers are vacant. That is a powerful argument for a merger and the Mahayuti route.

The second option — for both the NCP faction and to merge with the BJP. There is political equity here but no growth. It is a crowded political space.

The third, faced particularly by NCP members like Jitendra Ahwad, is to join the Congress. There are many constituencies where MLAs have won with the support of the minorities. Joining the BJP-led Mahayuti could endanger this vote. Joining the BJP will drive it away completely.

This is only one numeral in a complicated political equation. The BJP will hold its own consultations to assess the cost-benefit analysis of joining the NCP in the fold versus bringing the unified NCP into it. For the latter will include Sharad Pawar.

Leaders like Praful Patel, who is currently working president of the NCP and has declined the offer of a minister of state rank position in the Modi Council of Ministers ("because it was a demotion"), has suggested that Ajit Pawar's widow, Sunetra, be made deputy chief minister in the state government. This is unlikely to fly because she is already a Rajya Sabha member barely halfway into her tenure. Besides, Ajit Pawar was a seasoned administrator handling complex portfolios like finance. His wife is a relative newbie.

There are other complicated family dynamics at work involving colliding ambitions of nephews and cousins. Sharad Pawar will have to keep all these factors in mind as he negotiates further moves. His term in the Rajya Sabha ends in April. Despite having said he wouldn't, he may have to return as member.

When to stop fighting

The key to fighting a war successfully, or even launching it, is a clear objective. That's an entirely political call. It isn't emotional or purely military

Was India wise or hasty in accepting the Pakistani request for a ceasefire in about the 88th hour of Operation Sindoor? Should India have continued fighting, and until when?

These questions were revived last week with the release of the comprehensive report of the high-powered group that assessed the operation for the Switzerland-based Centre for Military History and Perspective Studies (CHPM). Its findings have mostly been welcomed in India.

This is as you'd expect, and not merely because it puts India's aerial losses at about half of what Pakistan claims. More importantly, it says that by the time the war was called, the Indian Air Force "managed to significantly degrade the enemy's air defence systems, then concluded the conflict by carrying out a series of spectacular strikes against Pakistan's principal Air Force stations. Thus, by achieving clear air superiority, India coerced Islamabad into requesting a ceasefire."

At another point, the report goes on to conclude "...sufficient elements appear to indicate that by the morning of 10 May 2025, the Indian Air Force had succeeded in achieving air superiority over a significant portion of Pakistan's airspace. This in turn enabled it to continue long range strikes against enemy infrastructure at will."

Not leaving anything to chance, the report concludes that at the same time, the PAF "had lost the ability to repeat the operations it had conducted so successfully on 7 May 2025, owing to the loss of its forward air-surveillance radars and the threat posed by S-400 systems to its AWACS and stand-off weapons delivery platforms..."

The findings looked faster and more clinical than anything seen from the Western think tanks yet, because they highlighted Pakistani retaliatory successes and Indian losses on the May 6/7 night, as well as the IAF's return to domination quickly thereafter. It also noted that even on the night of May 6/7, the PAF was not able to interrupt or deflect any Indian strikes on Bahawalpur or Muridke. In the immediate upshot, two questions emerged.

One, from sceptics who asked: Spectacular as Indian strikes were, can you call it air superiority because the IAF was launching from deep within its own airspace? This is somewhat nerdy and, some would argue (this writer included), outdated, as almost all warfare, especially in the air, is now long-distance and you do not have to go into the adversary's air-

space or even close to it. This question is relatively esoteric.

The second, and the larger question, is the one we raised right upfront: Did India accept the ceasefire too early? Many serious and substantial questions can be asked about the strategy, and rue that a hard-won opportunity to chastise Pakistan was sacrificed. The counter-question would be: How would then India have defined victory and when? With a total destruction of the PAF? A Dhaka, 1971 encore? India has argued since the evening of May 10 that its objectives were achieved, it owned escalation dominance and knew when to call it a day. Whether it was wise or the typically old Indian habit of leaving issues unfinished, is the debate.

This is a question fundamental to all warfare. A war must be defined by the objectives, especially for the side that starts it. That's the question Atal Bihari Vajpayee had asked at the peak of the full mobilisation for Operation Parakram in January 2002, when the furious national mood wanted an all-out war. Vajpayee himself had subsequently threatened "a *aur-paar ki ladaai*" (a fight to the finish). But early that January, in a conversation recorded by me multiple times while he was around, he reflected on what the history of that war would be when this history is written.

The key to fighting a war successfully, or even launching one, is a clear objective. That's an entirely political call. It isn't emotional or purely military. Not knowing clear objectives, India got bogged down in Operation Parakram, fully mobilised and deployed for 10 months. Ultimately, a totally uneventful, tired thaw led to a return to barracks. Did India miss an opportunity? It's an enduring debate.

While the mobilisation was in its early weeks (it followed the terror attack on Parliament on December 13, 2001), General Pervez Musharraf delivered a dramatic, televised speech that sounded like an almost total capitulation. He promised to let any Pakistani controlled territory be used for terrorism. He even said that Pakistan had not given asylum to anyone on India's list of 22 fugitives. If we find them, we can send them back, he said.

Could the Vajpayee government have seized that moment, declared victory and rolled back the mobilisation? I would argue that it missed that moment. Ten months dug-in on the frontlines led to unnecessary pain and loss of life (India lost nearly 800 and Pak-

istan about as many), only to accidents with live ammunition and minefields. The final outcome, as documented in the Vajpayee-Musharraf talks and the Islamabad Declaration (6 January 2004), was no better than what was conceded in that January 12 speech.

There were three such decisions in our independent history, two made by us and one by an adversary. In 1999 and 1971, India set clear objectives: The clearance of all occupied Kargil territories, and the liberation of Bangladesh, especially from the Islamist forces, to expand the fighting beyond the LoC. Indira Gandhi offered an immediate ceasefire in the western sector after Pakistan's surrender in the east.

There is an eternal debate and regret in some circles that she did not finish the "business" in the western sector. But she was clear in her objectives and declared victory after just 13 days of fighting. The third such call was taken at our cost. In 1962, the Chinese declared a unilateral ceasefire and returned from where they had started in the eastern sector, and in Ladakh barring some enclaves. Their objective of teaching Nehru and India a lesson was attained. They did not want to get bogged down in a never-ending war, especially when they had multiple crises at home.

I understand that in the middle of 1962 and 1971, there was also the 1965 war, which ended with much international pressure that neither side pushed back against. Only Pakistanis, who started the war, had an objective — taking Kashmir. They lost out and India defended more than adequately. Both were wise to accept a ceasefire.

In conclusion, we can look back at General George S. Patton's famous view that the Allies should have taken the war into the Soviet Union to defeat "the Communists" rather than let them become a perpetual threat. He didn't say so quite as dramatically as in the movie, but there are records of him pleading with the then Under-Secretary of War, Robert Patterson, on May 7 and 8, 1945. On May 18, he wrote in his diary that he could defeat the Russians "with the greatest ease." He wrote to his wife making the same point. All of this is archived.

There is good reason behind the oldest wisdom that war is too serious a business to be left to generals. Add to that social media strategists. That call is made by politicians, who look at the bigger picture. This was the case for America in 1945, China in 1962, India in 1971 and 1999. Operation Sindoor has a limited objective, destroying the *Jaish-e-Muhammed* and *Lashkar-e-Tolba* centres by the IAF and Army. This, done, was offered on May 7 morning. Because Pakistan fought on, their bases were attacked, imagery secured, and it was time to call it a day, in victory. Knowing when and how to stop fighting is as important as starting it.

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To ban a mockingbird

EYE CULTURE

ATANU BISWAS

"Remember it is a sin to kill a mockingbird" is an iconic line from Harper Lee's *To Kill a Mockingbird*, spoken by Atticus Finch to his children. It symbolises the injustice of harming innocent creatures or individuals.

Today, 10 years after Harper Lee's passing and in her centennial year, it's important to note that in 2021, *The New York Times* named *To Kill a Mockingbird* the best book of the previous 125 years. Be that or not, the book encountered significant social challenges in North America over the years.

The book was banned from classrooms and libraries in September 2025 by the Leander Independent School District in Central Texas; from a secondary school in Brampton, Ontario, in 2009; a high school in Texas, in 2012; Virginia, in 2016; Illinois, Mississippi, in 2017; Duluth, Minnesota, in 2018; and California's Burbank Unified School District, in 2020-2021; among other places, the book encountered difficulties or was removed from reading lists or classrooms.

People have questioned the book's appropriateness in classrooms due to its racial slurs, profanity, frank discussion of rape, and occasional "White Saviour" narrative. Nevertheless, the book continues to be a mainstay of American literature, and it's frequently defended as a crucial teaching tool regarding racial injustice and prejudice.

Actually, since 1963, *To Kill a Mockingbird* has been a significant source of controversy. After learning that the school administrators were holding hearings to determine whether the book was suitable for the classroom, in an editorial letter to *The Richmond News Leader*, Harper Lee suggested that the \$10 that she sent be used to fund the enrolment of "the Hanover County School Board in any first grade of its choice."

The N-word undoubtedly causes discomfort for many people in the Western world. Perhaps, they see this word's pronunciation to reflect their history in a mirror. And confronting it makes them feel very uneasy.

Interestingly, in 2006, a poll conducted by the UK Museum, Libraries, and Archive Council named *To Kill a Mockingbird* as the topmost book everyone should read before their death, even ranking it above the Bible. To be honest, without properly addressing racism, sexism, and religion, any meaningful book on American society might be lacking. Literature reflects society. It may not be a sign of maturity to reject the image of society and its dialects from a century ago. If society has improved, it can be compared to that previous image.

US President Dwight D. Eisenhower's famous quote — "Don't let the book burners" — came from his 1953 commencement address at Dartmouth College. He especially challenged McCarthy's anti-communist hysteria and censorship attempts by urging Americans to embrace intellectual freedom, read widely, and not

be afraid of ideas. "Don't be afraid to go to your library and read every book, so long as that document doesn't offend our own ideas of decency. That should be the only censorship," he said. Naturally, some would argue that students should be at least mature enough to comprehend it.

Lee's *To Kill a Mockingbird* was published in 1960. It's a tale of a Black man who was charged with the murder of a White woman. The Great Depression is the time frame. Scout, the story's narrator, was six in those years old at the time. Atticus, Scout's father, was the lawyer of Tom Robinson, the Black defendant. Thus, the story's theme may be a little sensitive. In actuality, the book contains 17 instances of the word "rape." Is it advisable for our society's eighth-grade students to read such a book in the school curriculum? Most of my acquaintances I asked responded negatively. But this was not the main problem in America. The primary objection there was the N-word, which was used 48 times in the book. So, yes, societies are different.

Undoubtedly, it's just as wrong to ban or silence a mockingbird as it is to kill it. But is it at all possible in this era of the internet? Perhaps banning a book will encourage a lot of students who might not have otherwise read the *Mockingbird* narrative to do so. Silencing a mockingbird is undoubtedly difficult. That may be the takeaway in Harper Lee's centennial.

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Rethinking the Republic Day tableaux

YES, BUT...
SANDEEP GOYAL

As one witnessed the Republic Day parade earlier this week, one as usual felt much pride in the progress and diversity of the nation — but one also felt a bit of visual fatigue vis-à-vis the parade spectacle. The parade has started to look much the same year after year. True, the themes do vary and change somewhat year-to-year, but there is still tremendous scope for innovation and newness.

Tableaux were not always a part of the parade. After the Constitution came into force in 1950, the pageantry of Republic Day constituted only a military spectacle showcasing the strength of the newborn nation. Cultural tableaux were introduced only in 1952, supposedly to add a pedagogical dimension of pride and pluralism to the parade. For the country's new leadership, the parade became a tool to propagate the meaning of the Indian nation to its own people — a curated cultural demonstration of "unity in diversity." A Madhya

Pradesh float back in the 1950s displayed Gond and Baiga tribal artists at work a Punjab tableau a decade later celebrated the Green Revolution with wheat fields and mechanised ploughs; and the Tamil Nadu tableau for years showcased Bharatanatyam dancers and temple *gopurams* to represent Dravidian culture.

Themes got more progressive as the republic matured. Gujarat's 2001 tableau showcased the state's industrial growth and its new ports; Maharashtra's 2010 float depicted the transformation of Mumbai into a "global city" with the Bandra-Worli Sea Link as its focus. Goa's "Save the Frog" float was an environmental first while Odisha's post-cyclone reconstruction float was a tribute to national resilience. The 2024 Uttar Pradesh tableau centred on the Ram Lalla consecration at Ayodhya and the *Pran Pratishtha* ceremony of January 2024, with an artistic model depicting Lord Ram in a young avatar holding a bow and arrow. The themes have, however, largely remained staid and predictable.

If one were to re-imagine the Republic Day parade somewhat, to inject some new thinking, one could draw inspiration from the Jidai Matsuri — the Festival of Ages — held on October 22 every year in Kyoto, Japan. The parade is like a moving history book before your eyes. The Jidai Matsuri Festival

procession depicts historical periods, eras and major events in reverse chronological order, spanning from the Meiji Restoration in the early 19th century to the Heian period in the 8th century. The spirits of Emperor Kanmu, who transferred the capital to Kyoto, and Emperor Komei, the last emperor to rule from Kyoto, are transported in sacred carriages called *gohoron* as a form of ritual meant to help Kyoto remain secure, developed, and prosperous. The historical processions from each era accompany them during their journey from Kyoto Imperial Park back to the Heian Jingu Shrine. The procession encompasses eight historical periods beginning with the Meiji Restoration (1868) and ending at the Enryaku era (782-806).

Around 20 groups with approximately 2,000 participants and 70 horses and oxen join to form a two-km-long parade with 12,000 costumes and ceremonial items are used in the festival to showcase the vibrant colours and the pinnacle of Kyoto craftsmanship. Through meticulous research, artists have recreated these pieces using authentic ancient materials and techniques, ensuring historical accuracy down to every thread. Most depictions exceed museum quality in replication of details and historical exactness. It is the most artistic replay of national history anywhere on Planet Earth.

The Kyoto Festival could certainly be an inspiration for future Republic Day parades. The accent at Jidai Matsuri is on history — and India too has loads of it to celebrate and remember.

The parade in 2030, the Oak Anniversary of the Republic — and oak being a symbol of strength, stability, and longevity — can start with the Maratha Empire (1674-1818), move on to the Mughals (1526-1857), the Vijayanagara Empire (1336-1646) and then to the Delhi Sultanate (1206-1526) covering the Mamluk, Khaji, Tughlak, Sayyid and Lodhi dynasties. Then, the Marathas can then be tableaux on the Chola Dynasty (300s BC-1279 CE) known for their naval power, maritime trade, and empire-building; the Pala Empire (c.750-1174 CE) that ruled Bengal and Bihar; the Rashtrakuta Dynasty (c.735-982 CE) a major power that competed for Kannauj at one time; the Chalukya Dynasty (543-753 CE) that dominated the Deccan, based in Badami; and the Pallava Dynasty (275-897 CE) renowned for Dravidian architecture. They would make for a spectacular parade. A further rewind could take us back to the Guptas, the Kushans, the Satavahans, the Mauryans, the Nandas and the Haryanka eras.

Eight decades into the parade, it is time to re-imagine and refresh. The author is chairman of Redifusion

Darzi to Designer, That Brand Jump

India needs more Tanishqs at Paris

India's jewellery exports are pushing their way into the branded segment as the industry pivots towards formalisation. The presence of top brands like Tanishq at marquee events like Paris Fashion Week is an assertion of the country's growing aspirations in the luxury segment. India is the world's largest exporter of jewellery. Yet, there is ample scope to climb far up the value chain. The capitalisation funnel for India's jewellery industry has widened in recent years with interest by large business groups. This is aiding modernisation of the industry across the value chain from import to re-export. Quality assurance and design capability are giving branded jewellery the edge among India's growing middle-class consumers, with spillover effects on exports. Titan, the Tata Group company that owns Tanishq, acquired the UAE's Damas last year to widen its footprint in West Asia while catering to regional design and brand sensitivity. Tanishq's showcase events in the US and Europe are pitching a new design aesthetic in a crowded market.



Aditya Sinha

Article 112 of the Constitution requires the President to place before Parliament an annual financial statement, an account of receipts and expenditures; budget. Formally, it is an exercise in fiscal discipline. Nothing in the Constitution assigns it a larger philosophical role.

Yet, since 1991, the budget has become a statement of intent on how the state understands markets, growth and its limits. In periods of ample fiscal space, that intent is often expressed through spending. In periods like the present — marked by weak nominal growth, external uncertainty and binding medium-term pressures — it must be expressed through reform.

This distinction matters, because the binding constraint on India's growth today is not capital, labour or technology. It is institutional friction. Growth is increasingly constrained not by what firms cannot do, but by what regulators do not permit them to do.

Remember Charles Dickens' 'Little Dorrit' in the novel, the Circumlocution Office exists not to solve problems but to ensure that nothing is ever done, except the production of more procedures. Authority is exercised through delay, paperwork and obfuscation, none of which impose any cost on the authority itself.

Modern regulatory states risk a milder, but economically significant, version of the same failure. Regulation accumulates because regulators face no equivalent of profit and loss. When rules impose costs, those costs are dispersed across firms and consumers. The result is a systematic bias toward over-regulation, irrespective of intent.

Recent Indian reform efforts recognise this problem, at least implicitly. The

Let it be!

High-Level Committee on Non-Financial Regulatory Reforms, announced last year, has successfully nudged Govt towards pruning redundant compliances, consolidating overlapping rules, and reducing administrative burden. But the unfinished task is more fundamental. It concerns how regulators themselves are governed.

In an Economist essay, Argentinian president Javier Milei and his deregulation minister Federico Sturzenegger pose an uncomfortable question: why are markets relentlessly disciplined, while regulators are not? Their provocation — 'rein in regulators, not big companies' — can be misread as ideological. It is crucially analytical.

Large firms are frequently the outcome of efficiency, scale economies, learning effects and innovation. What matters is whether others are free to challenge them. State interventions should focus on creating competition, not on disciplining winners.

Indian policy has long struggled with this distinction. A residual socialist instinct treats smallness as virtue, and scale as suspicion. Threshold-based compliances, differential compliance, procurement preferences and regulatory scrutiny collectively encode this bias. Firms are protected from small but penalised for growing large. Market leadership is treated as something to be managed.

This misdirects policy. If entry is

open, dominance is temporary. If entry is closed, the cause is almost always regulatory (licences, quotas, discretionary approvals), not market power itself. Narendra Modi has articulated this principle during one of his interviews in which he said that inequality should be reduced by raising incomes over time, not by flattening everyone into poverty. The same principle applies to firms. The objective is not to preserve small enterprises indefinitely, but to enable them to grow, compete and, if successful, become large.

Regulators operate as monopolies by default. They impose delays, documentation and uncertainty that carry no cost to the regulator, but impose real costs on the economy. Unless exposed to feedback, regulation inevitably engenders suspicion and fear.

Regulators must rest on four principles:

1. **No scale exception** Policy must abandon size-based suspicion and treat market dominance as presumptively efficient, unless it is sustained by state-created barriers to entry. Objective of regulation should not be to cap firm size but to maximise threat of entry. Differential compliance regimes that favour small firms merely subsidise fragmentation and penalise growth. The correct response is

not compliance escalation at scale thresholds, but uniform, low-friction regulation that allows firms to expand without crossing regulatory cliffs.

2. **Choice and regulatory competition** Wherever feasible, firms should be offered parallel regulatory pathways (standardised, principles-based or sandboxed) subject to transparent disclosure. Regulation that delivers net value will attract voluntary adoption. Regulation that does not will be avoided. A system that does not allow regulated entities to vote with their feet cannot learn and, therefore, cannot improve.

3. **Discipline through consequence and accountability** Regulation must face hard constraints analogous to fiscal rules. Sunset clauses, statutory decision timelines, deemed approvals and rollback triggers linked to observable outcomes, such as compliance costs, firm entry rates, investment response and innovation metrics, should be introduced.

4. **Modest ambition** Key Regulation is an implicit tax. It raises costs, delays adjustment and suppresses entrepreneurship. A reform-oriented state must institutionalise regulatory cost accounting with the same seriousness as fiscal accounting. Budgets should publish regulatory cost statements alongside tax and expenditure accounts. What is not constrained cannot be constrained, and what is not constrained will inevitably

This reframes the budget exercise itself. In an era of constrained fiscal space but expansive regulatory reach, growth will depend less on allocating capital and more on removing institutional friction. One is reminded of the phrase coined by 13th-century Roman poet Juvenal: who will guard the guards? In this case: who will regulate the regulators? Budget 2026 should show the way.

The writer is a public policy professional

THE SPEAKING TREE

Silver Lining

BHARAT RAWAT

We do not all need to run in the same direction. Each person's life is more of a journey than a particular domain at a particular time. Not everyone's current concern need be money or fame; so, don't worry about the current rally in metal prices. We do not need to be equally excited about investment opportunities or stocks. What may be genuinely important to you may be relatively useless for me in my current situation. The real task is not to blindly pursue what appears valuable to everyone, but to remain aware of which domains of one's life needs attention.

Let's start with our own assessment of our unmet needs. Mass-low classified these domains as depicted them like a pyramid. In an ideal world, we do not blindly pursue what society labels as success or progress.

It rums the current dollar rate or fluctuations in silver or gold prices should not matter. Maybe our lives need more attention to health, relationships, inner stability, meaning or livelihood. Real progress begins the moment we identify our own area of imbalance and respond to it consciously. Instead of following general group tendencies shaped by external strategies and narratives.

We may be blind to our own areas of weakness or raw chapters of life that need healing, while being impressed by highlights of the world's drama. The outside world has no idea which tender moments need your attention and care. Let's discover and heal those areas preferentially.

Chat Room

Trending Now: Grand Equity

Avanotes' Steady, Steady... Go by Arun Dasgupta (Jan 30). Economic Survey 2025-26 highlights a significant shift from our traditional savings culture toward equity. Individual investor holdings have risen to ₹41 lakh in September 2025 from ₹6 lakh in FY14, a 10x spike — even as deposits fell from 38% in FY12 to 22% in FY25. This signals structural maturity than fixation for returns. Our economy today resembles early phases of advanced economies in the 1980s-90s, when households gradually migrated from deposits to capital markets as inflation fell, financial intermediation deepened and wealth diversified. The data points to diversification, not abandonment: deposits still abundant, but equities are being layered on top.

That said, uncertainty would linger over low real deposit returns, asset inflation and anxieties on future employment and retirement. Households are prudent and higher-yielding assets. Equity participation is being shaped as much by aspiration as by anxiety, reflecting both confidence in our growth story and a hedge against macro-financial stress. R Narayanan Navi Mumbai

You Don't Strike While Metal's Hot

This refers to 'Price a Bar for Gold Consumption' by Sunita Ghosh (Jan 30). The crash in gold and silver prices is an expected lines as they have moved up too much too soon, and correction seemed imminent. Prices of metals, be it gold, silver, copper, aluminium, etc, need to consolidate at particular levels before investors think of buying or short-selling as volatility, if in the range of 14-15%, can be suicidal for those taking bets.

We witnessed an almost ₹7,000 fall in silver in a matter of couple of hours yesterday. The first sign of policy measures to control speculation in metals where Fed is planning to get a hawkish chair, leading to wild fluctuations in the prices of gold and silver.

This is also a warning shot to have a diversified portfolio that has equity, fixed deposits, gold, silver, etc, to not just hedge risk but look at growth and safety. The percentage of savings in equity on one's risk-taking ability and a disciplined approach when volatility is high. Accidents happen more often at high speeds; caution is advised in times of crazy rise in equity and metals markets. N Kabra Mumbai

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

Expectations vs Reality: Our Cities

Well, what do you know — there's one line in this year's Economic Survey that has read our collective mind: our cities are 'aspirational but exhausting' — magnets for opportunity and ambition, yet booby-trapped by pollution, overcrowding and a pace that quietly erodes everyday life. Beyond governance and financial fixes, the survey goes beyond the usual data points survivors so love — civic norms, shared responsibility and respect for public spaces. These intangibles explain why public behaviour can seem unruly in one setting, yet surprisingly disciplined in another: orderly queues on Mumbai's BEST buses, or calm commuters on the Delhi Metro (see column below).

The challenge, of course, is bridging the gap in these national 'expectations vs reality' meme of our cities. You may cheer the India-EU FTA for cheaper Maybachs and Lamborghini, but where will they go? On cratered roads that double as experimental water bodies each monsoon? Through traffic that treats lane markings as abstract art? We build flyovers to escape congestion that earlier flyovers promised to fix, inaugurate metro lines while last-mile travel remains an endurance test, and launch smart cities where the smartest survival skill is patience.

The survey's subtext is clear: India faces an infra and coordination deficit. We cannot build new cities from scratch, retrofitting old ones is Herculean, and a commons-first mindset cannot be legislated. Aspirations and economic left alone will not sustain urban life. Until governance, social norms and design work in harmony, our cities will remain wonderful in theory and exhausting arenas in practice. Ambition has arrived. But with civility and predictability still under construction, we await conversion to reality.

Only Time India Inc Agrees: B-Day



Harsh Goenka

For one brief, glorious period every year, Indian business folks undergo a miraculous intellectual transformation. Chairpersons, promoters, MDs and assorted CXOs — who otherwise outsource everything from tax planning to PPTs — suddenly become macroeconomists, deficit theorists, deficit hawks and growth evangelists. For 48 hrs before and 24 hrs after the budget, India has more financial pundits than ET. Individuals who usually have no understanding of macroeconomics begin dissecting revenue assumptions, spending discipline, and policy intent with monk-like confidence. Industrialists who haven't personally read a tax circular since liberalisation express how suggested tax reforms will support entrepreneurship and long-term economic stability. Family WhatsApp groups acquire the confidence of policy conclaves, where everyone claims insight into the FM's thinking.

In the run-up to the budget, expectations rise to a level usually reserved for

miracle cures and India's impending presence in World Cup finals. Business associations submit wishlists that would make a genie nervous. Lower taxes, higher government spending, fewer regulations, faster clearances, generous incentives, zero deficit, a stable rupee, cheap oil and global demand. All simultaneously, preferably without consequences.

B-Day itself is ritualistic. At 11 a.m. sharp, businessmen across India sit before screens with notepads they haven't used since MBA school. Nobody listens to the full speech. Everyone waits for keywords that look familiar: Infrastructure. Manufacturing. MSME. Green. Digital. Export competitiveness. Phones vibrate, heads nod and messages fly: "Very positive." "Strong signal." "Game changer."

Then comes the golden half hour: TV studios swing into action. The same business who were unsure 5 mins ago now deliver instant verdicts with supreme authority. No one ever says, "I need to study the fine print." Instead, a small but powerful vocabulary designed for all seasons is used: balanced, pragmatic, growth-oriented, non-populist, forward-looking. These clichés stretch beautifully across any budget since 1991.

If taxes go up, we applaud Govt's courage and commitment to fiscal discipline.

If taxes go down, we praise its sensitivity to the common man. If nothing changes, we celebrate policy stability. There is no scenario — never — in which a senior businessman goes on record and says, "This budget is muddled and underwhelming."

Behind closed doors, of course, use money returns. Sectoral pain points are discovered. Footnotes are reread. Calculators come out. Someone notes that the fine print given with one hand and gifting screens with notepads they haven't used since MBA school. Nobody listens to the full speech. Everyone waits for keywords that look familiar: Infrastructure. Manufacturing. MSME. Green. Digital. Export competitiveness. Phones vibrate, heads nod and messages fly: "Very positive." "Strong signal." "Game changer."

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The verdict tomorrow

JUST IN JEST
For a template to follow, look no farther than Republic of Metro below

India, Go Viksit, Go Underground

Honourable readers, India has spent decades drafting Vision 2020, Vision 2047, Vision Infinity and Beyond, and Vision Visionary documents, each promising to transform us into a 'viksit' nation. Best of luck with that. Yet, developed India already exists, not on our firmament but below it: in the Metro Rail universe under many of our cities. Above ground, we wear the brand ambassador of chaos and entropy. But descend into Metroworld and — chhu mantar! — we become Berlin with a dash of Singapore. People queue, maintain order, and keep the corridors, platforms, subways... clean. They make way for passengers before boarding. They even stand on the right side of the escalator, temporarily turned into First Worlders. The Metro ecosystem is undoubtedly India's most successful behavioural experiment. No litter, since the floor is shinier than living room tiles. No one shouts, because announcements are audible enough. And everyone taps their card with the solemnity of a monk ringing a temple bell. Even our gleaming airports, with their passenger outbursts, have the Metro as their secret 'world-class' role model. So, after the budgetary show is done, and the op-eds are lost and won, pay attention to the only republic where Indians voluntarily obey rules without needing a Supreme Court directive or sounding out baat that's on well-intentioned minds.



Ram Sewak Sharma

For nearly two decades, BSNL symbolised stagnation of India's public sector. Once the nation's telecom monopoly, it saw subscriber erosion, financial losses and decaying infrastructure, rendering it nearly irrelevant in a market dominated by rapid innovation and private competition. Yet, in under 3 yrs, BSNL has initiated a turnaround that extends beyond financial recovery. It marks a structural reset in India's telecom narrative, reinforcing digital sovereignty, competitive balance, and the future of state-owned enterprises in network industries.

At the centre of BSNL's revival is its indigenous 4G stack — a strategic gamble that placed India among a handful of countries capable of providing end-to-end telecom technology. After years of delay and scepticism, BSNL has now deployed nearly 98,000 4G towers, with a sustainable path to 5G. This transition reduces dependence on foreign vendors, enhancing security and resilience in an increasingly fragmented global tech landscape.

Metrics such as network uptime and full-repair time show tangible gains. BSNL is rebuilding its fibre and radio infrastructure to match private benchmarks — turning the promise of 'industry-grade service' into reality.

Customer response This network transformation has triggered a shift in consumer behaviour. Between Q1 and Q3 FY26, BSNL's average revenue per user (ARPU) rose from ₹81 to ₹99 — a 22% increase, indicating higher-value users returning to the network. Subscriber additions have resumed. The change is grounded in market response, not accounting optics.

Winning back trust Infrastructure alone does not drive success in telecom — execution does. Recognising this, BSNL is modernising its legacy customer systems. Cloud-native CRM platforms are being introduced to support real-time analytics and faster grievance resolution. These shifts enhance customer satisfaction and its competitive edge, moving BSNL away from a price-only positioning.

A cultural shift within the organisation reinforces this transformation. Field units are now measured on subscriber growth, ARPU and satisfaction, instilling a revenue mindset. The new language is one of performance and accountability.

Government reset BSNL's transformation mirrors broader public sector reform principles: shifting from bureaucratic inertia to performance-led accountability. Circle general managers now act as business unit heads with defined financial targets. Quarterly reviews ensure oversight without micromanagement. This governance reset has led to sharper performance

discipline. From red to black After 18 yrs of continuous losses, BSNL posted consecutive quarterly profits beginning Q3 FY25. Its EBITDA rose from ₹2,164 cr in FY24 to ₹5,386 cr in FY25 — up 148%. Margins more than doubled to 25%, signalling real operational efficiency.

What makes this revival more than a brief recovery is whether BSNL can sustain momentum through structural capital investment. BSNL's operational improvements rest on ageing infrastructure. Moving beyond stabilisation into genuine market leadership requires sustained, serious capital investment in network modernisation: 4G towers, fibre network strengthening and modernised customer systems. For the government to walk away now, after demonstrating proof of concept, would be economically illogical.

While stabilisation is underway, sustained growth, competitiveness demands deeper reforms:

► **Leadership stability and decentralised execution** A full-time CMD with fixed tenure would ensure continuity. Strategic discipline, yet state-anchored — especially in sectors with strategic and social externalities.

► **Diversifying beyond B2C BSNL**

must expand its B2B and B2G offerings, such as enterprise connectivity, IoT and managed services. Partnerships with system integrators and startups can help scale without excessive overhead.

► **Incentives and talent alignment** Performance-linked pay and promotion tracks are essential to attract and retain professionals in a competitive market. BSNL's revival is not just a balance-sheet success. A strong public operator provides competitive pressure and moderates tariff shocks, and serves as a national backup for essential telecom services. The indigenous 4G stack is a case in point — its development would have been commercially unviable for a private player.

BSNL's story is still unfolding. At less than 8% wireless market share, it is far from dominant. Execution risks remain, especially in enterprise services and consistent quality delivery. But the foundation is sound.

The deeper significance lies in what BSNL represents: a state-owned firm adopting private-sector discipline without sacrificing public purpose. Its turnaround challenges narratives of inevitable PSU failure and opens space for a hybrid model: state-disciplined, yet state-anchored — especially in sectors with strategic and social externalities.

If sustained, BSNL's revival could become a pivotal chapter in India's telecom journey — where public capital, professional management and national interest converge to create lasting value.

The writer is former chairman, TSI



A thought for today

If I designed a computer with 200 chips, I tried to design it with 50. Then I would try to design it with 100. I just tried to find every trick I could in life to design things real tiny.

STEVE WOZNIAK, co-founder of Apple

DRAM Beaters

Why AI can push up the cost of your next smartphone

If we could make only one Budget wish this year, it would be that govt remains mindful of the global memory crisis. Not the kind that's related to social media overuse – duly noted in Economic Survey – but the shortage of DRAM chips for phones, tablets, laptops and other smart devices. Supply is so tight now that the three key suppliers have stocks for only 2-3 weeks, down from an average of 17 in 2024. Analysts expect memory prices to rise 40% by June. Some leading phone makers have said they may raise prices by 20%. No respite is likely, because building new factories takes a couple of years. Besides, the big three memory makers are wary of a future glut – such things have happened before.

Instead, they are investing "bigly" in making a different kind of memory called HBM that's needed to run AI. Now, an HBM chip is basically a stack of four to twelve DRAM chips, the kind found in your phone. But because this stacking is a complex task, each HBM is worth much more than the sum of its parts. Hence, extremely lucrative. And AI firms want millions of HBMs, at once. OpenAI, Google, Meta, Microsoft, Amazon, Alibaba, ByteDance... the list of firms willing to pay top dollar for them is long. For its Stargate project, OpenAI alone wants twice the current monthly global production of HBMs – every month until 2029. Hence, the DRAM shortage for ordinary folks. It's like what happens when rich people demand ethanol to run cars – food gets costlier for poor people, and they might have to eat less. Analysts see smartphone and laptop sales falling this year. There's nothing we can do about this shortage, but coming back to the Budget, govt shouldn't do anything to make devices on our wishlists costlier.

Sing, For The People

Protest music endures because govts often tune out

Springsteen lifted Minneapolis from near-despair, one with citizens at the frontline against brutal ICE tactics, with a song that has travelled the world faster than light, as only solidarity can. Adding to the greatest voices in song – of resistance against injustice, infusing new courage into ordinary citizens turned defenders of basic humanity. "A city aflame fought fire and ice/ Neath an occupier's boots/King Trump's private army from the DHS". When he sang, "We'll take our stand for this land...", the message is the same as Joan Baez's powerful "deep in my heart, I do believe we shall overcome..." Baez sang *Saigon Bridge* for Vietnam. "How many children must we kill/ Before we make the waves stand still?" but it could just have been for Palestine. Songs of protest endure, their connect with core humanity reclaimed time and again in different worlds – like Baez says, "in countries under deep distress or totalitarian states."

Anti-fascism movement's *Bella Ciao* is no longer Italian – translated into at least 33 languages, including Hindi, Bengali and Punjabi. Nothing can stop revisits to *Hum Dekhenge*'s promise of a time when "sab taj uchhale jaayenge/sab takht ghraaye jaayenge" (All crowns will be flung in the air/ All thrones brought down). Protest music travels effortlessly across cultures, a melodic heritage that's also always relevant – because all goes everywhere sometimes tune out of what people are saying.

Earth Is Not A Chessboard

Global power competition begets climate disaster

Trump threatens to take over Greenland, but backs down – for the moment. His tariffs roll global markets and supply chains. Middle powers are rushing to find a new equilibrium. Geopolitics today is top of the mind. But do we pause to reflect upon its impact on the planet? *Oceans Rise Empires Fall*, by Gerard Toal, looks at what geopolitics does to environment and ecology.

From a traditional perspective of international relations, the environment may appear to have little to do with geopolitics. However, this view overlooks the 'geo' of geopolitics and underplays the brutal competition for territory and resources. That in turn has had catastrophic environmental consequences.

The author says geopolitics has helped set modern human civilisation on a trajectory towards a holocaust on Earth. Geopolitics hastens future climate catastrophe.

This, on second thought, is logical. The fallout of nuclear war will be felt by the whole planet. It would likely prompt an initial global cooling as debris clouds prevent the sunlight from reaching Earth's surface. Radiation would spread wide, poisoning the biosphere. When the French conducted nuclear tests in French Polynesia, the fallout contaminated the idyllic atolls and residents. Similarly, the first US nuclear test in Alamogordo, New Mexico, saw continent-wide fallout with 46 American states and parts of Canada and Mexico being affected. The US, in a way, nuked itself. All for strategic, military and geopolitical power.

Second, the author argues that geopolitics prevents collaboration on climate change. For example, any meaningful climate compact needs China (currently the largest producer of emissions by tonnage) and US (historically the largest emitter) to cooperate. But that is unlikely because of geopolitical tensions between the two, especially over Taiwan. Plus, if maintaining large, sophisticated militaries is crucial for geopolitical power projection, then that too is contributing to the climate disaster through the production and deployment of war machines that guzzle millions of barrels of hydrocarbons.

In fact, an American MIA Abrams battle tank (which was deployed in the ongoing Russia-Ukraine war) consumes two gallons of jet fuel per mile. Fighter jets burn even more fuel. Note also that Ukraine has flagged environmental destruction caused by the Russian invasion as ecocide, treating this as a war crime – wars pollute the world.

So, it's not just arms companies profiting from war and geopolitical tensions, but also oil companies. In 2024, ExxonMobil earned a record \$55.7bn in profit. Saudi Aramco recorded a whopping profit of \$16bn in the same year. Therefore, there is a strong incentive for oil companies and producer states to literally fuel geopolitical tensions between the world's powers. And 'greenwash' the damage they are doing to the environment.

So, what's the solution? Unless action is taken, the world is on course for a catastrophic global surface temperature rise of 2.5°C or more over 1950-1900 by the end of the century. The challenge is to stop thinking of the Earth as a strategic chessboard. Today, geopolitics has returned to the German *Lebensraum* idea – the quest for "living space" in a mad race for new territories and resources that will power capitalist growth, even as colonialism and its post-World War II avatar have polluted the green swathes of the biosphere that has yet to be cleaned up. Climate change is the planet physically rejecting the superstructure of polluting human civilisation. We need to Earth geopolitics, is the author's excellent case.

What Does Paying 35% Tax Get Us?

Not clean air or water, not good roads or sanitation, not nice public hospitals. Sure, too few Indians are income tax payers. But an incompetent state does not offer them fair returns either

Siddharth Dhanvant Shanghvi



I remember the moment I knew I had to leave Mumbai: around 15 years ago, at the end of the monsoon, the water in my tap turned worryingly brown. Alab report confirmed sewage. The actor Hrithik Roshan, who lived down the road, made a similar complaint to the press. This was the true, satirical nature of Indian democracy: a humble writer and a Bollywood star were both forced to – and maybe I'm paraphrasing an American president – eat shit.

Around 35% of my income goes to govt, as it should; I have a disproportionately greater income than the average Indian so I'm taxed accordingly. In a country as unequal as ours, income redistribution via taxes is not a "freebie"; it's the language of civilisation. And yet, it stings more than ever when you remember how few Indians actually pay personal income tax.

In FY 2023-24, only 6.68% of Indians filed an income tax return, and PRS Legislative Research, using CBDT data, shows that most filers did not end up paying income tax. In FY 2022-23, 7.5% of people filed returns, and 4.7cr (63%) had zero tax liability. That means roughly 2.8cr Indians had non-zero income tax liability – around 2% of the population. This small 2% club helps subsidise the lives of everyone else (to be clear, all Indians pay taxes in the form of GST and other direct and indirect levies).

What does my 35% tax contribution buy me? Well, it's certainly not clean water – as the recent tragic deaths in Indore from contaminated water consumption evidence. Clean air can also be cut out of the equation; try breathing in Delhi today. IQAir reports that in 2024, India's average PM2.5 was more than ten times the WHO's annual safety guideline. A state unable to protect the air is turning every citizen into a patient.

Now, if you did fall sick in India, you could go to a state hospital to use the services your taxes paid for. But treatment in a state-run hospital might feel far worse than the sickness itself. As a result – and NITI Aayog's analysis confirms – about 60% of hospitalised cases

are treated in the private sector. Even as govt spending on public health rises, citizens still pay again: private hospitals, private diagnostics, private insurance.

My complaint is not ideological, moral, or even particularly political. It is bodily. As an Indian taxpayer, govt stands – at the best of the queue to yank at your money, and then makes you pay again, with your lungs, your guts, and your peace of mind. Maybe the state gets away with this because the system is built so no one is responsible.

its failures. *Diarrhoea builds character. Anaesthesia is overrated. If there's traffic, walk. If you can't breathe, it's your bad karma.* At no point will govt simply admit that it gives you almost nothing back.

But can we blame them? Most of India does everything in its power to escape paying direct or indirect tax. Large parts of the economy is informal: incomes are uneven, seasonal, under-reported, or hard to see. Enforcement is expensive, litigation is slow, so the state leans on the easiest levers: TDS for the compliant. GST for everyone, legal duties for the resigned.

Of course taxes do buy real things: defence, welfare programmes, infra that takes decades to reveal their full value. And returns on taxes cannot be reduced to personal perks for myself – or Hrithik Roshan – simply because we're in a higher tax bracket. The moral logic of taxation is collective: our taxes feed someone we will never meet; mine may vaccinate a child whose name I'll never know. That's not theft; that's the price of admission into society.

And yet, society also has standards – and reciprocity.

If the state wants more Indians to pay more taxes, it must show more competence. Indian roads are a civic metaphor for institutionalised corruption: they show us how perpetual repair is a form of governance. The Mumbai that I left behind did not have a pothole problem; rather, it enjoyed an excavation culture. The real money doesn't come from building a road and collecting tolls, but from the endless cycle of re-tendering, re-digging, re-laying... and re-bidding.

This is where the 35% goes.

And maybe that's why India has one of the highest net outflows of dollars in the world.

Per projections from Henley & Partners' Private Wealth Migration Report, India saw net outflows of about 5,100 (2023), 4,300 (2024) and 3,500 (2025) such millionaires. 35% of income tax is a first world tax grab for a fifth world return. So the honest taxpayer sows not delivery and then plots an exit into cash, into creative accounting, or into another passport.

There will be no return gifts at Nirmala's tax party. But someone must tell the host that a democracy cannot run on compulsory citizen payments and optional govt performance.



Chad Crowe (USA)

GOI does grand announcements and ribbon-cutting. States do "implementation", then come the clumsy explanations for why yet another newly constructed bridge collapsed. Cities are saddled with the mess we have to live with – garbage, drains, potholes, and that famous tap water & sewage. The 15th Finance Commission puts it plainly: our city govts are seriously underfunded and living on handouts while their own income shrinks.

Govt is adept at reframing your life through the lens

Woman, Say It With Pride, I Am A Gold Digger

The great gender wealth gap persists by socialising women to separate their emotions from smart financial decisions. They need to stop romanticising such rubbish

Renuka Bisht | timesofindia.com



A man has asked a woman out on a date. They are at a restaurant. After their order has arrived and she is digging into hers, he starts video-ing her, and grins. Why? Why has he ordered the most expensive items on the menu? She denies that she has, and points out that he chose the restaurant, and she's just ordered its speciality. He lists the cheaper items she could have ordered.

This is classic 'gold digger' behaviour. It's very popular on social media and has a pseudo-philanthropic quality. Like, it's social service for men: How not to be fooled by those women.

But this coherence only holds within the incel echo chamber. Step outside into actual reality, and it goes *chuuu mantar*. The most obvious puncture is this: If paying for his date's dinner is pinching him, what gold does he have for her to want to dig?

In imagining that a woman is chasing him for his (skinny) wallet, an incel is imagining himself as some kind of Jeff Bezos, or Elon Musk.

Remember how Sustimta Sen was trotted as a gold digger, after he posted a photo of the two, with the caption "my #betterhalf". That relationship is as over as hashtags. But Sen's stellar comeback then, has gone on to have a celebrity of its own: "I've always (famously) preferred Diamonds!"

And yes I still buy them myself!"

Like that episode, when men diss Bezos's partner as a gold digger today, it begins with a narcissistic identification with him. It is to prop up this fantasy of social bro-dom that the mindlessly disparage Lauren Sánchez. This needs pretending that a super-wealthy woman brings only looks and voodoo to the table, shrugging off the Emmy she won and the aviation company she founded well before meeting Bezos, as dross. And all this rubbish when the age difference is just years.

But it's not bro alone. Women do this all the time too. See the smart woman next to, say, a surgeon, and think

she's a 'trophy wife'. Never mind that she is good looking too, still less that she is also a successful professional. Or at least she was, until she had their children.

Fairy tales, movies, Mills & Boons... they all hype the poor woman meets rich man story. But in fact, the strongest force in partner selection is often similarity: handsome marrying pretty, middle class marrying middle class and so on.

Think about it, a Jane hooks up with a Bingley, an Elizabeth with a Darcy, a Lydia with a Wickham. They seem very, very well matched.

Yes, in the Austen marriage market we know very precisely who has how much capital. Those with less seek partnership with someone with more. Men too have done this throughout history. East to west, that's how many an empire has come to be. Indian marriages continue to be arranged basis financial considerations.

But height, weight, education, age, lots of other numbers also go into the matrix. Maybe people are more honest with their matchmaker about the exchange they truly want, than with their therapist.

Of Life And Love STORIES OF THE WAY WE ARE

So why does the gold digger label stick to Lauren Sánchez but not to Travis Kalanick, whose fiancée Taylor Swift is 'billionaire'? It defies logic. And screams double standards.

The gold digger label is a 20th century invention. Austen's world was about women who could only decide their destiny

in terms of deciding who to marry. As it becomes possible for women to build their future or family by other means, the new slur emerges. A masculinity ideated by control over women, is constantly inventing new ways to push back against equality.

What endures is everybody's interest in the relationship of love and money. That's why *Materialists* grabbed attention last year, as an update to *Pride and Prejudice*. The film is about a woman who has a job, and is torn between a man nearer her income range, and one who's way beyond. He's a unicorn – a billionaire with height, good hair, and tenderness. She doesn't choose him. That's fine.

What's nuts, though, is the proposition that her very bad financial decision is by definition a very romantic one. No, it's just a very stereotypical one.

It's how the great wealth gap between men and women persists. He is not socialised to prioritise emotions as separate from smart financial decisions.

He also routinely uses family money to seed startups. But if she ever inherits the family business, society doesn't stop dissecting whether she 'deserves' it. Female startups get less than 2% of global VC funding. A newspaper with 145 Pulitzer Prizes is still debating, "Did women ruin the workplace?" Motherhood penalty – a motherhood bonus are not fictions.

These are not fair shakes. So women need to man up. It's better to be too ambitious and a gold digger, than a fool. Nobody becomes a unicorn without capital from partnerships.

Sacredspace

Indians today are governed by two different ideologies. Their political ideal set in the preamble of the Constitution affirms a life of liberty, equality and fraternity. Their social ideal embodied in their religion denies them.

BR Ambedkar

Calvin & Hobbes



If You Feel Confused, Be Ecstatic

Swami Sukhabodhananda

When you look at Shiv, look at Him deep. Look at trishul – the trident – meditatively – and when you offer flowers to Him, do so meditatively. Then a beautiful poem emerges in your heart. Ahimsa prathamam pushpam, pushpam indriya nigramham, sarvabhoota dya pushpam, kshama pushpam visheshata, shanti pushpam tapo pushpam, dhyana pushpam tatatya, satyam satyam dya pushpam, vishnoh preeti karambhavet. When we offer a flower, we invoke eight important gunas. Ahimsa prathamam pushpam – non-violence is the first flower. Offering a flower is a bee – bheegam avadhamam. What pleases Shiv or Vishnu is not merely a flower, but the very quality of person who offers it. Meditation should become one's way of life.

Indic sutras are maxims filled with meaning. They are not elaborate; they are

condensed. They must be shaken well to extract their essence and to understand them in totality. In classical literature, two important methods are Adhyaropa-Apavada Nyaya and Indu Shaka Nyaya.

Indu Shaka Nyaya means pointing to the moon through branches of a tree. Imagine you have never seen the moon and ask your guru to show it to you. The guru says, "See the tree, see branches." You may feel impatient and say, "I want to see the moon, not tree." But if you do not even know where to look, the guru must begin with what you already know. Once your vision is guided between branches, the moon reveals itself.

Another classical approach is Adhyaropa-Apavada Nyaya. Something is stated and then negated. The student is not meant to cling to words, because a word is not the thing. The word 'water'

is not water; 'biryani' is not biryani. The word is only an indicator pointing to that which lies beyond it. Classical teaching is meant to stimulate thinking. Certain things are said, and some things are deliberately left unsaid. The student is invited to reflect. "Some of us think, many of us think we think, and most of us never think of thinking."

When the guru says, "I know what I have said and what I have not said," a thinking person begins to examine the relationship between these two. Psychological bridges are built – from known to the unknown, from vyakta to the avyakta.

If you feel confused, be happy. Confusion means you are capable of understanding. Thinking begins with confusion.

In *Brahma Sutra*, Ved Vyas writes, "Tattu Samanvaya" – all Vedas ultimately

speak one truth. At one place, Vedas say the truth is known by mind alone; elsewhere, they say you must go beyond mind. At one place, they say the Lord created the world; at another, they say there is no creation at all.

These are not contradictions. They are not paradoxes. They are prophecies meant to provoke inquiry. Hence Tattu Samanvaya – a grand synthesis that urges a seeker to think deeply rather than accept superficially.

When the mind becomes quiet, receptive, and alert, then a fool, nobody itself – not as information, but as insight. The teaching then ceases to be external and becomes one's own inner compass, guiding the seeker from known to the unknown, from form to formlessness and from ritual to realisation.

Swamiji will conduct an online workshop on Feb 7, focusing on health, relationships and stress-free living. Contact: 99017 77003

DECCAN Chronicle

31 JANUARY 2026

Like in 1991, will FM set a transformative path?

Every Indian may not understand the financial jargon that finance minister Nirmala Sitharaman would use when she presents her ninth Budget in the Lok Sabha on February 1. Similarly, an average citizen may not understand the import of the falling rupee or the ebbing US dollar flow. One thing that every Indian, however, would understand is that gold and silver — which are intrinsically connected to the ritualistic lives of most Indians — have become unaffordable. As a result, every Indian knows that "all is not well" and would have their eyes set on Ms Sitharaman.

The finance minister, therefore, carries a huge burden of navigating the country and its economy through unprecedented global financial uncertainty. When the world is in flux, India cannot remain aloof. The country needs to make hard choices. This Budget, therefore, may not be popular in the traditional sense, as it may not offer anything substantial in terms of savings to people or companies. However, Ms Sitharaman could lay the groundwork to extricate India from dependence on foreign countries for strategic products such as energy, electronics and defence equipment.

Imported fossil fuel has always been one of the major causes of financial distress for India. Though India achieved self-sufficiency in food through the Green Revolution, the world's most populous nation is dependent on other countries for commuting, which is the country's biggest vulnerability. The Budget could focus on rolling out another green revolution in energy to reduce this external dependency.

Another area of concern is electronics, which has become one of the major consumers of foreign exchange. However, the Indian manufacturing sector must become efficient to achieve self-reliance in electronics, especially in semiconductors and rare earths. Though it may seem difficult on the surface, the Indian automobile sector achieved this long ago. All that India needs is some big electronic players and a concerted effort involving government, industry and academia. The Budget could have something on this front.

Imported defence equipment is another pain point for India. The country is still dependent on other countries for key components of weapons systems, which keeps India hostage to foreign powers. The finance minister may take steps to further indigenise the manufacturing of defence components.

The Russia-Ukraine war and the US capture of Venezuelan President Nicolas Maduro showed how drastically technology has altered war. If India is not to be left behind in this race, the government should incentivise private companies to spend on research and development. Apart from this, Indian Institutes of Technology (IITs) should be nudged to become research hubs rather than factories that mass-produce engineers for the world. Ms Sitharaman's current Budget, therefore, should no longer focus only on the upcoming financial year; it should be path-breaking — something that posterity remembers in the same vein as the 1991 Manmohan Singh Budget. The Budget should take steps to make the country self-reliant and competitive, and not have a narrow-minded focus on polls or votes. It is time for the Budget to display a true sense of patriotism.

War & peace prize for Trump?

If there were to be a Nobel Prize for war and peace — with due apologies to Leo Tolstoy — there would be no contest as the US President Donald Trump would walk away with it. The avid claimant for the Nobel Peace Prize may have been disappointed with the decision of the Swedish committee last year, but he has carried on in his uniquely Trumpian style of threatening wars on one hand while pleading for peace on the other.

Mr Trump's latest initiative in employing war for a week's ceasefire in the harshest and coldest part of the northern winter may have had a positive response from the Russian President Vladimir Putin who may have agreed not to bomb Ukrainian cities so that the shivering people do not suffer more during power outages. Even Mr Trump's worst enemies, but it does appear as if his humanitarian ploy may have found a sympathetic ear after all.

If Mr Putin desists from hitting Ukrainian urban centres for a while, it might just suggest that he may not be averse to agreeing sometime soon for longer pauses in the Ukraine war that is just inches short of four years now. A man who had agreed to nothing in years of trilateral peace talks might just see the light even though a lasting peace would still be conditional on Ukraine agreeing to give away a considerable chunk of the Donbas in exchange for peace.

With someone else's Nobel Prize in hand, Mr Trump has kept himself busy ruminating over Pentagon options for attacking Iran with missiles from aircraft carriers, destroyers, combat ships and aerial bombers positioned in waters off Iran. However, Iran seems to have weathered the first wave of protests but, according to estimates, taking more than 5,000 lives.

It is believed the US President is giving diplomacy the first chance to bring Ayatollah Ali Khamenei's men to the table before letting his armada display their attack prowess, with the aim of keeping Iran off enriching its nuclear fuel resources further and also in solidarity with the protesters who seek to bring the regime down. And what could be more apt than a war and peace prize for the leader who has kept the world on edge as he alternates between waging war and talking peace.

KAUSHIK MITTAR
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Farukh Dhondy Cabbages & Kings

As ex-Tory Suella comes 'home' to Farage's Reform, will exodus start?

"The base Indian, three nives a pearl
More precious than all his tribe" —
The bard meant the jewel was a girl
But why does an Indian suffer this life?
And yes, in these lines the metaphor is mixed
No prize in this world ever had a price
But metaphors by appreciative readers' minds are fixed
As poets cast infinitely numbered dice.
— From Seen Twice on the Double-Dekker, by Bachcho

Last week's column had contained the speculation that Suella Braverman of the Conservative Party would be one of the greasy-arsed slipperies who it came to pass.

The nation watched as Nigel Farage, Führer of Reform, on the stage of some packed Reform Party occasion summoned her, and Cruella appeared to applause, embraced Farage and then she went into a vicious diatribe denouncing the party that she had abandoned as liars and deceivers.

She then went up to the grinning Farage and placed her head on his shoulder in a phlegmatic embrace, facing the cameras. Nigel looked like an imbecile infant who had been gifted a new, albeit ugly, teddy bear. Yukiko!

Go back to when Cruella was a Tory home secretary. She was responsible for — perhaps responsibly —

allowing Afghans who had collaborated with the British during the Nato occupation of Afghanistan, before the Taliban had chased them out, to settle in Britain.

It may not have been her compassionate decision. But the force of public opinion that compelled the move. At the time, Cruella was roundly denounced by this same Nigel Farage as someone who was betraying the British population by allocating accommodation to refugees while those Britons were still queuing for it.

That was then. As Cruella crossed the floor, becoming the third Tory MP "traitor", she said she felt she was "coming home". To back-tracking puppy?

This is a somewhat strange homecoming as her husband Rael Braverman had by now days before quit the Reform Party, "left home". Will he now follow Cruella and rejoin?

Rael is an ardent anti-immense and feels that both Labour and Tory are not sufficiently so. He joined the far-right "national-socialist" Reform, which he considers is violently anti-immigrant, and I suppose he knows, if not in an openly stated way, anti-Muslim. While a member, Rael had led other Jewish Reform members to attack Britain's Jewish Board of Deputies for "being too closely aligned with the Labour Party". There is no evidence of any formal alignment between the board and Labour, but the board did appreciate Keir Starmer's public efforts to purge the party of those he regards as antisemitic.

The Tory Party complicated matters over Cruella's

defection by a senior member issuing a statement which said, in effect, if not in so many words, that the party understood Suella's defection and sympathised with her as they were aware that she suffered from mental problems. This statement was attacked as it certainly contained the words "mental health".

At another level, a spokesman apologised for the phrase and withdrew the statement, having made the nation and potential voters aware that there was this smoke of crack-pottery emanating from Cruella, so there might be some fire.

Other Tories will certainly follow Suella's lead. The profiles of the present defectors, three sitting, and several former MPs who lost their seats or voluntarily left Parliament, such as Nadine Dorries and Nadine Dorricks, suggest to me, gentle reader, that their abandonment of the Tories is a reaction to their failure of ambition within it.

Both Suella and the previous defector, Robert Jenrick, failed in the recent past in their bids for leadership of the party. Zahawi was accused of illegal behaviour regarding tax and lost his seat, departing under a cloud. Reports say he begged Kemi Badenoch to be made a lord, and when he was rebuffed, went and defected to Reform.

Dorries was, and perhaps still is, an ardent "chanchi" (the Hindi term gets closest) of Boris Johnson and has constantly schemed to plot for his return to the leadership — yes, Judas to the Apostles?

Nigel Farage says he accepts these defectors to Reform

as his party has, apart from them, no MPs with any experience of government. He himself, though he was a member of the European Parliament and is a British Opposition MP now, has none. Never admitted to the corridors of power. Will he resign and let one of the experienced defectors take over the leadership? Will the Pope convert to Islam?

The question Britain needs to ask is not why Nigel Farage welcomes them, but why they are there. Cruella says she's finally "home". Let's look at what Jenrick has said about Reform and Farage before he moved into this residence.

In 2025, Jenrick publicly said that Reform was "not a serious party". He then antipathetically declared that Reform is moving "far too far to the right", causing major issues for "national cohesion".

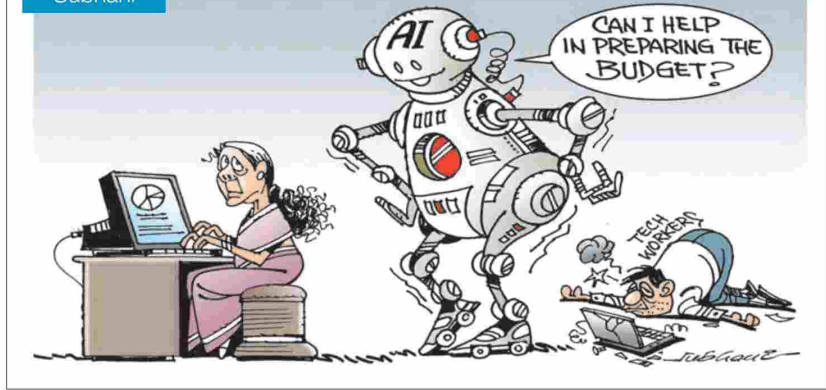
About Farage, he said he framed policy under the influence of a few points of view, and before joining them he said on TV that he wants to "put Reform out of business and to Islam".

He also said Farage "couldn't run a five-a-side football team, leave aside a country".

Were those opinions insincere or is his defection blatant opportunism?

And then Farage has in the past called Jenrick a "fraud". So, now, good Christians all, they've turned the other cheek — not for another slap, but a reconciling kiss?

Subhani



Trump on rampage: For US, costs are piling up

Indranil Banerjee

US President Donald Trump has emerged as the single most disruptive force in American and world politics. Like many strong leaders of the past, he wishes to shape the world according to his personal vision, using raw power. Unrestrained by considerations of ideology, ethics or costs, he is redefining political and strategic equations by the use of force, economic coercion and intimidation. The bigger question is whether the tactics of yesterday will work in today's complex and far more evolved world.

There was a time not so long ago in history that the exercise of raw power offered immediate and overwhelming rewards. The Portuguese sailed into the Indian Ocean towards the flag end of the 15th century and proceeded to displace the Arabs, and every other maritime and littoral power, with unprecedented ferocity, thereby ensuring for themselves an unchallenged writ over the eastern oceans for well over a century. They were only ousted by the British more than a century later, who used similar uncompromising power to reduce the Portuguese to a shambles and took over the world's oceans for themselves. Unabashed power worked in geopolitics as well as in domestic situations.

Napoleon Bonaparte was among the most prominent world rulers to demonstrate that unbridled power could force political outcomes, and provide legitimacy sans consent. The notion that power and not ideology could determine political outcomes was further reinforced by Otto von Bismarck, the "Iron Chancellor" of Prussia. Their strategy worked — Napoleon created the largest French empire in history while Bismarck unified Germany but at a terrible

American politicians can sense a groundswell against the President's policies and many analysts predict that Mr Trump and his party could face a rout in the next mid-terms scheduled for November this year

immigration drive, including US homeland security secretary Kristi Noem and Border Patrol commander at large Gregory Bovino, instantly became national villains.

Driven to the wall, President Trump said his administration was "going to de-escalate a little bit". Television news channels, quoting sources in the White House, however, felt it was a turning point and that the goal was to scale back and eventually pull out of the country.

The most worrying aspect was the emergence of an organised opposition to Mr Trump's anti-immigration drive, which some officials have termed as "terrorism".

The American geopolitical analyst Andrew Korybko wrote: "Never before has there been such a modern, tech-savvy, and socially popular insurgency in a US metropolis. The goal is to neutralise the federal government's authority in Minneapolis, which could lead to a domino effect in other metropolises if this insurgent network replicates its by-then successful campaign there."

He claims that the unrest in Minneapolis should be considered an insurgent movement, not a riot, as it is being led and organised by highly tech-savvy citizen opponents of actions by Immigration & Customs Enforcement (ICE) and Border Patrol (BP) agents. He feels that "there's no doubt this campaign is professionally coordinated at a level far beyond anything hitherto seen in the US."

This is alarming, if true. At another level, American politicians can sense a groundswell against the President's policies and many analysts predict that Mr Trump and his party could face a rout in the next mid-terms scheduled for

November this year. And anti-immigration is not the only reason. The good times promised by President Trump are yet to materialise and the US dollar, like consumer confidence, have hit historic lows. The currency has lost more than 10 per cent of its value since Mr Trump took office for a second time and, according to a Reuters report, consumer confidence has "slumped to the lowest level in more than 11-1/2 years in January amid mounting anxiety over a sluggish labour market and high prices, which could see households becoming more cautious about spending."

In foreign affairs too, President Trump's boasts about being the Big Daddy of the world do not seem to be materialising. His promise to end the Ukraine war within days of moving into the White House has proved to be a washout and the bullying of his European allies has sent them scurrying to clinch new alliances around the world including with arch-enemy China.

Venezuela might have lost its President but the country has not quite fallen into Mr Trump's pocket and US oil companies are anything but thrilled about "taking over" that country's oil sector. Canada, once the closest US ally, now talks about a rupture in the world order and is busily finding new friends. Greenland finds a new predator while Europe recoils in horror. An American armada is moving threateningly towards Iran with no clear objectives and the possibility of a nightmare war that could change the Middle East forever.

If Donald Trump indeed wished to be another Bismarck, he might have got it all wrong. Power is much more difficult in today's world and awareness is all pervading. Moreover, American power is long past its peak. Big Daddy could end up like another Humpty Dumpty.

The writer is an independent commentator on political and security issues

LETTERS

PROBE MUST GO ON

Shiv Sena (UBT) leader Sanjay Raut has criticised BJP for issuing newspaper advertisements mourning the death of Ajit Pawar. He is of the view that, instead of indulging in such symbolic gestures, the BJP should drop the corruption allegations levelled against Pawar earlier, now that the Ajit Pawar-led NCP is a constituent of the BJP-led Maharashtra government in Maharashtra. Raut's argument is baseless since the on-going investigation should be allowed to come to its logical conclusion. A man's culpability does not get erased by his death in the meantime. Late J. Jayalalitha was found guilty in the disproportionate assets case. Had she been alive, she would have been behind the bars today in accordance with the court verdict.

P.G. Menon
Chennai

TIMELY WARNING

Chief Minister M.K. Stalin has said that NDA will ruin the developed state of TN if voted to power and it is a timely warning to the people. A dispassionate assessment into various happenings in the country will spell out the truth that it is only after the BJP assumed power, the Centre that India has been witnessing numerous attacks on minorities in the name of religion. The BJP goes to any extent to capture power in various states, even when they have no vote bank. Only states like Tamil Nadu and West Bengal have survived such an onslaught by the BJP. The "Double Engine Sarkar" of BJP in NDA-led governments like UP, Bihar, Assam, Manipur, Uttarakhand, Rajasthan and MP lay in key parameters of development.

Tharcius S. Fernando
Chennai

MEETING GROWTH AMBITIONS

The Economic Survey 2025-26 has highlighted several paradoxes confronting India's economy. Despite healthy macroeconomic indicators such as steady growth, moderate inflation, rationalised GST rates and new trade agreements, there are no clear signs of a broad-based revival in private investment. At the same time, merchandise exports continue to remain sluggish. The weakening of the Indian rupee is often expected to boost exports. However, the Survey rightly notes that the currency's valuation does not fully reflect India's strong economic fundamentals. What the economy urgently requires is sustained investor confidence and higher export earnings in foreign currency. Structural reforms, policy stability and export diversification will be crucial to meet growth ambitions.

M. Jeyaram
Sholondan

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COMMENT

Editorials

Long-term, consistent comprehensive strategic China-UK partnership mutually beneficial

Reflecting a shift in how major countries assess stability, development and cooperation in a volatile world, the first visit to China by a British prime minister since 2018 carries significance beyond bilateral ties.

Underscoring that China has always adhered to the path of peaceful development, Chinese President Xi Jinping stressed in his meeting with United Kingdom Prime Minister Keir Starmer on Thursday that China will never pose a threat to other countries no matter how it grows and develops.

Sending a clear signal that dialogue and cooperation serve the fundamental interests of both countries, the two leaders agreed the two sides should develop a long-term consistent comprehensive strategic partnership. For the UK, this entails viewing China's development objectively in the first place. After several years of adjustment under so-called "de-risking" approaches, the UK, like some other European countries, now seems to recognize that artificially distancing itself from China is neither practical nor sustainable.

China is a reliable partner because of its openness, policy stability, long-term development potential and vast market. At a time when many European economies face mounting economic pressures, there is a strong impetus for them to strengthen practical cooperation with China, and the UK is no exception.

Xi called on the UK to expand the frontiers of cooperation with China in education, healthcare, finance and the service sector, and to strengthen joint research and industrial transformation in areas such as artificial intelligence, bioscience, new energy and low-carbon technologies. These are also the areas where the UK seeks new growth drivers and where China's vast market, complete industrial system and continuous opening-up offer tangible opportunities.

Thus, Starmer's visit, accompanied by dozens of business leaders as well as representatives from academia and culture, which followed the visits of several European leaders and senior officials to China over the past months, reflects the pragmatic reassessment of major country relations underway in some European countries.

In recent years, the rise of unilateralism has become the major variable impacting Europe's strategic and diplomatic environment, disrupting global trade and squeezing the policy space of countries. Strengthening dialogue and exchanges with China has emerged as a viable and rational way for European countries to restore balance in their external relations.

What these visits highlight is China's role as a

source of certainty, predictability and stability in a turbulent world. It is the world's second-largest economy's consistent support for multilateralism, economic globalization and the stability of global industry and supply chains that has gained its stabilizing role increasing recognition.

This recognition is grounded in hard facts. Despite a complex external environment, China's trade surplus topped \$1 trillion in the first 11 months of 2025, demonstrating the competitiveness of its manufacturing and the attraction of its market. Meanwhile, measures to expand market access in services, enhance foreign investment facilitation and promote high-quality development have reinforced confidence among international businesses and investors. Such certainty stands in contrast to the unpredictability that has unsettled global markets and partnerships elsewhere.

Increasingly, European countries are realizing that formulating China policy solely through the prism of the transatlantic alliance is neither realistic nor in their interests. Adopting a more independent, rational and pragmatic approach toward China is gradually becoming a mainstream understanding in the core policymaking circles of more and more countries.

In this light, strategic coordination between China and the UK, along with other major countries, on the world stage is of practical importance. Foreign Minister Wang Yi in a phone call with Emmanuel Macron, diplomatic adviser to the French president, on Wednesday conveyed a similar message.

To that end, countries should handle their differences properly. The differences should not be allowed to define their relationship. What matters is adhering to mutual respect, engaging in candid dialogue and preventing differences from escalating into confrontation. Good things often come with difficulties. Despite facing complex challenges, responsible leaders must display the courage to forge ahead as long as the actions align with the fundamental interests of the country and its people.

Yet it must be pointed out that the engagement sought by other countries with China should not be driven by short-term, utilitarian considerations or because of temporary external pressure but their true commitment to stable relations.

If the UK and Europe more broadly show greater vision and pragmatism and take concrete actions to strengthen strategic coordination with China within the framework of multilateral platforms, this will be conducive to promoting a stable, balanced and just international order that produces tangible benefits for the world.

Cai Meng



Opinion Line

Politicizing business cooperation undermines shared interests

In a letter to the US commerce chief and another to the Ford CEO, John Moolenaar, who chairs the US House Select Committee on China, sought to cast suspicion on normal, market-based cooperation between US-based and Chinese enterprises.

Moolenaar's actions follow the now familiar pattern of overstretching the concept of "national security," politicizing economic and technological exchanges and substituting conjecture for evidence. Such moves run counter to market rules, hurt US companies and consumers, and undermine the stable development of China-US economic and trade relations.

Responding to the latest accusations, Liu Pengyu, spokesman for the Chinese embassy in the United States, made China's position clear. China has consistently opposed the politicization of trade and technology issues and the abuse of "national security" pretexts, and hopes the US side will take concrete actions to keep global industry and supply chains stable.

This stance is fully translated into the consistent statements of China's commercial authorities, which have repeatedly emphasized that China-US economic and trade relations should be based on market principles, with mutual benefit and win-win outcomes as their essence.

The facts surrounding the cases cited by Moolenaar speak louder than rhetoric. The congressman alleged that Nvidia's cooperation with Chinese companies and Ford's partnership with CATL pose "security risks". But as Nvidia stated, China has ample domestic chips for its needs and it would make no sense for China to depend on US technology. Ford, for its part, stressed that expanding lithium iron phosphate battery produc-

tion in the US through licensed technology is an investment in US workers, local economies and energy security, while complying with US laws and tax credit requirements.

What is conspicuously absent from Moolenaar's China-targeted lobbying campaign is substantiated evidence. Assertions that "inevitable" violations will occur if US companies engage with Chinese partners amount to presumption of guilt by association. Such reasoning ignores due process, commercial reality and the fact that companies operate under regulatory oversight.

Moolenaar's political theater also raises a practical question the congressman has yet to answer: If US companies such as Nvidia, Ford and many others were to follow his urges and sever ties with Chinese partners and suppliers, who would pay for the resulting surge in production costs? Market competition has demonstrated that many Chinese products and services offer outstanding cost-performance advantages. Forcing abrupt "decoupling" would translate into higher costs for US manufacturers, reduced competitiveness, and ultimately higher prices borne by US consumers.

Studies by the Federal Reserve system, the National Bureau of Economic Research, and the Peterson Institute for International Economics have consistently found that trade with China has significantly lowered US consumer prices, effectively increasing households' purchasing power.

One widely cited finding shows that a 1 percentage point increase in Chinese import penetration is associated with roughly a 1.9 percent decline in consumer prices. These are not ideological claims, but empirical conclusions drawn from rigorous analysis. Ignoring them is a sign of obtuse prejudice.

China-US trade supports large amounts of jobs on both sides of the Pacific, stabilizes global supply chains and contributes to the well-being of the US economy. Attempts by some China hawks in Congress to rewrite these realities through political posturing risk inflicting real harm on the very constituents they claim to represent.

As lawmakers with significant influence over US policy on the world's most consequential bilateral relationship, members of Congress bear a responsibility that extends beyond partisan posturing. They should show professionalism and pragmatism, grounding proposals in facts and outcomes rather than illusion and personal ideological prejudice.

Abandoning zero-sum thinking is not a concession; it is a prerequisite for safeguarding US economic interests.

In this regard, Chinese Foreign Minister Wang Yi's remarks during his meeting with a visiting US House delegation in September remain highly relevant. He expressed the hope that US lawmakers would understand China accurately, view differences rationally and explore cooperation actively, noting that the hard-won stabilizing trend in China-US relations should be cherished. China and the US, he stressed, are partners rather than rivals or enemies, and need to enhance dialogue, avoid misjudgment and promote mutually beneficial cooperation.

History and economics both show that politicizing normal business cooperation leads nowhere. If Moolenaar and other like-minded US lawmakers truly care about US prosperity and global stability, they would do well to heed market rules, respect facts and let cooperation prevail.

— LI YANG, CHINA DAILY

Military adventurism risky Middle East bet

The clamor caused by the United States' unilateral actions against Venezuela and its land-grab attempt of European territory shouldn't mask the fact that tensions in the Middle East have reached a critical point due to its transactional geopolitical calculus.

Over three months after the first phase of the ceasefire deal in Gaza was reached, Israeli military strikes have yet to stop. As China's Permanent Representative to the United Nations Fu Congyong in a UN Security Council meeting on Wednesday, it is incumbent on all parties, Israel in particular, to fully comply with the ceasefire agreement and work toward a comprehensive and lasting ceasefire.

The humanitarian situation in Gaza remains grave. The United Kingdom, Canada, France and eight other countries on Wednesday rightly condemned Israel's demolition of the UN's Palestinian relief agency building in occupied Palestinian territory, saying it represents the latest "unacceptable move" by the Middle Eastern nation to undermine the UN's ability to operate.

Meanwhile, with the US still unquestioningly supporting Israel — deploying aircraft carriers to the region and threatening military action against Iran — the shadows of war are looming large over the region. The world should be vigilant to the military adventurism that has reared its ugly head in the escalation of tensions with Iran.

As Fu stressed, Iran's sovereignty must be respected and its legitimate concerns should be addressed through peaceful means. To that end, all parties should abide by the purposes and principles of the UN Charter and engage in constructive dialogue rather than resorting to threats and coercion. History has repeatedly proved that the use of force doesn't solve problems, and that dialogue and negotiation are the only viable path to peace and stability. However, Israel's military actions and the US' support are pushing the entire Gulf region dangerously toward war.

The path to peace in the region is to resolve the Palestinian question with the two-state solution, respect the sovereignty and choices of regional countries and adhere to the principle of resolving differences through political dialogue and consultation. Opposing external interference while promoting development and stability is essential to addressing both the symptoms and root causes of the regional problems.

In the process, the UN should play a leading role in monitoring the ceasefire, providing humanitarian assistance and overseeing the postwar arrangements and other issues, so as to prevent "small circles" or "camp confrontation".

Regional countries should work together to establish an autonomous security architecture. China's efforts in mediating the resumption of diplomatic relations between Saudi Arabia and Iran offer a constructive example for regional countries to explore workable paths to peace and security.

Gaza's future, the broader Palestinian question and peace in the region as a whole hinge on the two-state solution and accommodating the legitimate concerns of all Middle Eastern nations. But the starting point for that is the immediate cessation of all hostilities. China's commitment to supporting Palestine's role in post-conflict governance reflects the broader international responsibility to foster peace and stability in the region. The UN Security Council, with its mandate to maintain international peace and security, must continue to engage actively in this process, ensuring that the situation in Gaza remains a global priority and that Iran's sovereignty and security are not violated.

If Washington and Tel Aviv intend to join forces to attack Iran, which they claim to be the biggest "threat" in the Middle East, they will soon discover that they are merely opening Pandora's box once again, unleashing a new round of chaos in the Middle East that they will be unable to control.

What They Say

Industry and finance should support innovation

Editor's note: Huang Hanquan, head of the Chinese Academy of Macroeconomic Research, spoke with China Economic Times about what is needed to promote scientific and technological innovation in China. Below are excerpts of the interview. The views don't necessarily represent those of China Daily.

The real estate sector used to serve as a major engine driving China's growth. However, in recent years, the driving force of this growth engine has gradually weakened. Therefore, there is an urgent need to build a new growth engine that is powered by scientific and technological innovation.

The development of this new growth engine requires effective integration of innovation, industrial upgrading and financial development. Industries play a central role in converting scientific and technological achievements into productive capacity and in guiding the optimal allocation of financial resources. A thriving capital market is needed to let both entrepreneurs and investors share the returns from scientific and technological innovation.

It is necessary to develop a multi-tiered financial service system which is tailored to the needs of innovative enterprises. This includes expanding the pool of patient capital and encouraging investors to make long-term

financial commitments in newly launched and high-tech projects.

More efforts are needed to consolidate the role of companies as major players in scientific and technological innovation. They should be encouraged to make decisions on innovation, invest in research and development and accelerate the commercialization of research outcomes.

This requires an environment of fair competition, where State-owned, private and foreign-funded companies are all treated as equals and enjoy the same access to the market and other resources. Meanwhile, protection of intellectual property should be strengthened, and inclusive and prudent regulation of start-up technology companies should be adopted.

The country needs to build a system to facilitate efficient technology transfer and ensure that innovation outcomes and the needs of industries are matched. Companies should be encouraged to develop innovation strategies according to market

demand, and professional institutions should form a "bridge" between universities, research institutes and companies. The quality of innovation should be further improved to ensure research and development efforts target what industries and the market really need.

Different regions should adopt different measures to drive innovation. Those with abundant innovation resources, such as Beijing, Shanghai and the Guangdong-Hong Kong-Macao Greater Bay Area, should pursue cutting-edge, original and disruptive innovation across multiple fields.

The central and western regions should leverage their own distinctive industries and focus their resources on research to make breakthroughs in niche sectors. Counties and third- and fourth-tier cities should create diverse scenarios for applying cutting-edge technologies while taking into account the local resources and industries. They should use the technologies to foster new industries or transform traditional ones.

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VIEWS

Emmanuel Daniel

More consumption, more circulation

The objectives for the financial sector in China's 15th Five-Year Plan (2026-30) may be "ambitious". They aim to keep markets, credit and innovation but prevent runaway asset inflation and debt-led consumption, and ensure that finance does not drift away from social utility.

The tone was set at the Central Economic Work Conference in December 2025. China wants to stimulate domestic demand and consumption. But unlike Western economies, where financial deepening means larger balance sheets, higher leverage, and ever-expanding asset pools, China is determined to ensure that "more consumption" leads to more "circulation" and the system remains anchored to the real economy and to households.

This is where the "velocity of money" matters. If money is applied actively to productive activities, the system can support consumption and services without needing a continuous expansion of the balance sheet. But if circulation slows down, money pools into assets and leads to inflation that any economy would want to avoid.

The CEWC itself is prioritizing the removal of "unreasonable restrictions" in consumption, unlocking service consumption and advancing an "AI Plus" initiative to raise productivity and shape credit allocation.

At its January 2026 work conference, the People's Bank of China reinforced this direction. Even while advocating a looser monetary policy, it emphasized "high-quality economic development" and a "reasonable rebound in prices" as key objectives. The bank said it will target refinancing tools toward services consumption and will not allow liquidity to leak into the asset markets.

The same logic underpins the joint action plan for promoting the high-quality development of digital finance. It has set a concrete target: by the end of 2027, "a financial system highly compatible with the development of the digital economy" should be "essentially established". The plan pushes data governance, digital transformation of institutions and consumer protection. The e-CNY is also positioned as a potential pillar of this architecture to create universal access.

This is China treating consumer finance as economic infrastructure: payments, data, and rails that increase participation and potentially raise velocity, while tightening oversight through "function-based and penetrating regulation". The CEWC has signaled a preference for income-anchored consumption rather than purely debt-anchored consumption. The consumption push is being operationalized with fiscal-financial coordination to channel credit into key consumption sectors such as elder care, tourism, digital services and green industries.

The National Development and Reform Commission and the Ministry of Finance are clear about where the interest subsidies should be applied: a 500 billion yuan (\$71.9 billion) investment guarantee plan to support small and medium enterprises. A continuing trade-in subsidy program backed by special treasury bond funding was announced in December 2025.

The Ministry of Finance is also directing its own spending toward improving the



policy. It links fiscal support to longer-term capacity via investment in "new quality productive forces" and talent development, while accelerating efforts to resolve hidden debt risks and curb new increases. Very clearly, China is trying to expand consumption while tightening the screws on the debt machinery that tends to fuel inflation.

A key challenge is institutional behavior. China's top financial regulator wants to reduce disorderly competition and has urged banks and insurers to focus on core businesses and differentiated development. But will the institutions toe this line?

After all, commercial banks focus on net interest margin and balance-sheet expansion, asset managers chase assets under management growth and relative performance while markets thrive on repricing and exit. These logics don't align with a system that wants high participation, controlled speculation and higher velocity.

But the bargain on offer is quite attractive: fewer catastrophic crashes, fewer existential shocks and a policy environment that rewards alignment. Though resistance from some institutions should not be dis-

missed, the best institutions rarely sabotage reform.

China may also need institutions the West is not familiar with: hybrid entities that behave like financial utilities, credit infrastructure or transaction-first platforms. Their incentives will not be profit maximization. Instead, they may have caps on upsides and tighter behavioral constraints. In return, they will have stable funding, regulatory certainty, guaranteed volume, preferred access to policy tools and reduced tail risk.

All this will need the overlay of medium to long-term capital, the fuel that greases the financial system. Here, China's securities regulator released an action plan to increase the scale and proportion of index investing, a system that does not rely on mania, but on long-duration compounding and predictable governance. This has to attract foreign capital as well, not to fund

the ecosystem but to validate it.

China's 15th Five-Year Plan for the financial sector may prove that the capital can be redesigned to circulate rather than accumulate, that consumer finance can expand without turning households into leveraged balance sheets and that institutions can be incentivized to serve flow rather than hoarding. It will be the blueprint of a system that engenders broader participation, higher-quality growth, controllable inflation dynamics and a financial sector that deepens the economy without eating it.

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MA XUEJING / CHINA DAILY

Wang Peng

Broader unease at Board of Peace bypassing UN

United States President Donald Trump recently announced the establishment of a new international body – the so-called Board of Peace – and invited roughly 60 countries and international organizations to participate in the endeavor. The draft proposal indicates Trump can be the "life-long" chairman of this institution, and member states must pay \$1 billion to secure permanent membership. Representatives from 19 countries attended its signing ceremony in Davos, Switzerland, on Jan 22.

A statement from the White House said the "Board of Peace" would provide strategic oversight in implementing the "20-point plan" for resolving the Gaza conflict. However, beneath this seemingly neutral statement lies a more complex political agenda.

The "Board of Peace" is supposed to be a multilateral organization. In reality, it is anything but. Decision-making will be tightly controlled by the US, particularly Trump himself. According to the White House statement, the institution will "operate under the leadership of President Trump" and six of the seven founding members of the executive committee are US nationals.

This structure alone turns the "Board of Peace" into a US-led substitute for the

United Nations. Though the UN Security Council has acknowledged Trump's plan and welcomed the establishment of the "Board of Peace", it does not alter its inherently unilateral nature.

The draft proposal of the "Board of Peace" further exposes its true nature. According to documents obtained by Reuters, the committee will be "chaired by Trump for life" and member countries will only have a three-year term unless they pay \$1 billion for permanent membership.

It is an innovation in governance where influence is no longer negotiated but purchased. The \$1 billion membership fee violates the principle of sovereign equality in international relations. It effectively excludes most developing countries, turning the institution into a club for wealthy nations.

Trump's push for the "Board of Peace" is driven by multiple strategic considerations. In the short term, this move aims to consolidate his leadership on the Gaza issue and present himself as a "peacemaker". The board will oversee transitional governance and appoint senior officials of international peacekeeping forces.

In the long term, Trump seeks to reshape the international order by establishing a new mechanism that bypasses the UN framework. Trump has long been critical of the UN and accused it of being

hostile to US interests. In January, he announced the withdrawal of the US from many UN agencies. The creation of the "Board of Peace" is his latest move to challenge multilateralism and pursue the "America First" policy.

The project will have a profound impact on global governance. First, it will weaken the authority of the UN. Several Western diplomats have warned that the mechanism could "undermine the role of the UN".

It could also fragment global governance further. The institution explicitly states that it will "first address the Gaza conflict, then expand to other conflicts". The model of paying large sums of money to secure permanent membership of an institution dominated by one country replaces multilateral negotiation with financial politics. Moreover, it could force countries to choose sides, thereby disrupting international solidarity and cooperation.

Notably, Russia, China, the UK and France all abstained from authorizing the "Board of Peace", citing concerns that the resolution did not clarify the UN role in Gaza's future governance. Their stance reflects the broader unease among major powers about bypassing the UN framework.

The so-called Board of Peace also suffers from fundamental legitimacy problems.

While the UN secretary-general diplomatically stated that member states "have the right to form various cooperation mechanisms", he emphasized that the UN will continue to fulfill its established mandates and responsibilities.

The complexity of the Gaza issue is far beyond what a US-led institution can resolve. As acknowledged in the White House statement, Gaza requires "restoring core public services, rebuilding civil institutions and stabilizing daily life," all of which require widespread international cooperation and sustained political will.

The contrast is stark. In Gaza, children walk through the rubble searching for drinkable water, while in Washington, officials discuss how to allocate power and funds. Members of the "Board of Peace" discuss \$1 billion permanent memberships in luxurious conference rooms, while the civilians of Gaza are struggling for their next meal. It not only exposes the brutal reality of international politics but also reminds us that true peace cannot be purchased with money, nor imposed through coercive power.

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Chen Weihua

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Hardworking delivery workers deserve hongbao

The Chinese Lunar New Year, or the Spring Festival, falls on Feb 17 this year. As the country prepares for its most important holiday festival of the year, the giving of hongbao, or gift money put in red envelopes, remains a cherished Chinese tradition. Today, many people gift hongbao through mobile wallets such as WeChat.

Hongbao is usually given by elders to younger people and by business owners to their employees, its red color symbolizing good luck. But there is one group that also deserves this gesture of goodwill: China's delivery workers who work hard, or too hard in my view, to make our lives easier. I don't think any other country can match China's efficiency in online shopping and food delivery.

I say this both in a positive sense for their remarkable efficiency, but also as criticism for the harsh working conditions imposed on them by companies and, at times, by customers.

Xiao Yin, a young man from East China's Anhui province, was the first person to receive my hongbao this year because I will be away for three weeks and won't see him during the Spring Festival. When I asked whether he will go home for the holidays, he nodded, then in a low but emotional voice told me that he will quit his job and not return to the city.

There should be more pressure on employers to implement relevant national laws on social security benefits.

Despite working 12 hours a day, he said it's very difficult to earn a decent income. It was already 7:30 pm when he delivered a package to my home on Wednesday. I saw him coming to the neighborhood one morning with a mountain of parcels stacked on his moped trailer.

His company, SF Express, one of the largest logistics companies in the country, does not pay for his social security. Although several major online shopping platforms pledged after the Spring Festival last year to provide social security benefits to their employees, the reality is quite different. Only a fraction of the employees is covered.

Delivering parcels is a high-risk job. Speeding, running the red lights and riding the wrong way are common in many Chinese cities due to the pressure of time. China has a massive army of nearly 10 million delivery workers. And there were thousands of traffic accidents involving delivery workers in 2023, nearly half of them caused by riding in the wrong direction. Cities like Shanghai have tried to clamp down on such traffic violations.

I do not condone the violation of traffic rules. However, the extreme pressure put on the delivery men by their companies and customers is a major reason for this chaos. Even a one-minute delay, or customer complaint, legitimate or not, would likely result in a hefty penalty on the worker by the company.

In China, social security includes pension insurance, medical insurance, work-related injury insurance, unemployment insurance and maternity insurance. Today, many delivery workers still don't have pension or medical insurance.

Apart from the delivery workers, many migrant workers in ride-hailing businesses or foot massage parlors still do not enjoy the social security benefits from their employers.

In March 2023, Wang Feng, a deputy to the National People's Congress and a delivery worker turned manager at a branch of SF Express in Hubei, called for designating a national "delivery men day" to honor those working in the fast-growing industry. It was a brilliant idea.

Giving hongbao to delivery workers is a way to show appreciation for the hard work they put in to make our lives convenient. More importantly, it is an outcry for improving their working conditions and labor rights that they rightly deserve in China.

There should be more pressure on employers to implement relevant national laws on social security benefits. The big online shopping platforms should honor their pledges made a year ago.

I wish China's delivery workers good luck in the Chinese Lunar New Year of the Horse, as symbolized by hongbao.

Opinion

Should Iran's executioners go unpunished?

It's up to the U.S. to impose meaningful consequences on the Iranian regime for one of the worst atrocities of this century.



Bret Stephens

To put into perspective the scale of the Iranian regime's massacre this month of its own people, it's worth recalling that over 1,200 Israelis and foreign nationals were murdered in the Hamas-led attack on Oct. 7, 2023, while just under 3,000 people perished in the attacks of Sept. 11, 2001. The Battle of Antietam, the single bloodiest day in American military history, claimed some 3,600 lives, Union and Confederate alike.

So far, a U.S.-based Iranian human rights group says it has verified the killing of more than 5,500 protesters and is still reviewing 17,000 additional cases. Many thousands more were injured, and independent reports indicate that tens of thousands of Iranians have been arrested or arbitrarily detained. An Iranian doctor in the city of Isfahan told The Times of having seen young people whose brains were smashed with live bullets, and a mom who was shot in the neck, her two small children were crying in the car, a child whose bladder, hip and rectum was crushed with a bullet.

That's just one eyewitness report among many. Meanwhile, the head of Iran's judiciary promises punishment "without the slightest leniency." His name is Gholam-Hossein Mohseni-Ejei. Will the world let him get his way?

That's the question that, at this writing, confronts the Trump administration. Not the United Nations Security Council, where Iran can rely on diplomatic cover from its close friends in Moscow and Beijing. Not the European Union, which has condemned and sanctioned Iran, but lacks any additional means to punish it. Not Arab leaders, who would prefer a weakened Iran that brutalizes its own people to a broken Iran that exports instability — or a liberated Iran that inspires emulation.

And not the campus activists and global do-gooders who care so deeply about Palestinian lives but not about Iranian ones.

So it's left to the United States to impose meaningful consequences on the Iranian regime for one of the worst atrocities of this century. Donald Trump told Axios Monday that the Iranians "want to make a deal" that would forestall a military strike. Yet Tehran shows no sign so far of agreeing to America's core demands that it ban all independent uranium enrichment, end its support for Hezbollah and other proxies, and put caps on its long-range missile program.

Iran could always become more pliant, if only to play for time. But the



GETTY IMAGES

odds are growing that the president will order some sort of attack once sufficient U.S. forces are in the region, which could happen as early as this week. That, in turn, makes it more likely that Israel will become involved — either because it will respond to Iranian retaliatory missile strikes or because it will seek to pre-empt them by hitting first. Whichever way, this will not be a Venezuela-style sub-three-hour war.

Is the military option wise? The argument against it is that it's unlikely to achieve much. Iran's traumatized protesters might have been energized by a U.S. attack when they were still in the street; they

would probably be unwilling to risk their necks again. The regime has surely learned the lesson of Israel's successful strikes last June against its top commanders and is hiding its leaders much more effectively. Last year's Israeli strikes on Iran's ballistic missile sites did not keep Iran from restarting production lines once the war had ended. And a U.S. attack, even one that carefully spares civilians, will also reinforce the regime's propaganda about perfidious Uncle Sam.

Weighed against all this is a different set of risks: of the example of a U.S. president who urged protesters to go in the streets and said help was on the way only to betray them through

inaction; of missing the opportunity to cripple an enemy when it is vulnerable, uncertain and — despite its show of force — internally divided; of giving it time to recover its strength, knowing that when it does it will again pose a clear and present danger to the United States and our allies.

And something else: Do we really want to live in a world in which people like Mohseni-Ejei, the judicial leader, can terrorize people with utter impunity? Have decades of vowing "Never again" — this Tuesday marks the anniversary of the liberation of Auschwitz — taught us nothing more than to offer pro forma condemnations when thousands of protesters are

gunned down by modern-day Einsatzgruppen?

I know that, for now, thoughtful Americans are much more alarmed by the thuggish killing in Minneapolis on Saturday of Alex Pretti and by the smears to which he's been posthumously subjected by senior members of the administration. I also know that the president who is so grotesquely at fault for inflaming the situation in Minnesota makes an unlikely champion of protesters in Iran.

But if Pretti's death is a tragedy, what do we say or do in the face of the murder of thousands of Iranians? Are they, as Stalin might have said, just another statistic?

Trump's China policy might be incoherent on purpose

Keeping Beijing off balance has advantages, but the president may just be playing for short-term political gain.

Kurt Campbell

President Trump's second-term approach to China is full of contradictions. One minute, he is threatening tariffs on Beijing and bolstering Taiwan's military; the next, he's lavishly praising Chinese President Xi Jinping and easing high-tech trade restrictions. His critics say this scatter-shot policy is incoherent. But in foreign affairs, inconsistency is not necessarily incompetence. Mr. Trump has used unpredictability to good effect in the past, including in relations with Beijing. The question is what he is after now.

Mr. Trump is unmistakably drawn to powerful autocrats. He admires — perhaps even envies — Mr. Xi's brutal treatment of domestic foes and his repression of press opposition. Mr. Trump has reversed bipartisan restrictions on the flow of the most advanced semiconductor technology and artificial intelligence chips to China, undercutting one of the few areas of clear American advantage in the contest for global technological leadership. And he has resurrected, jarringly, the "G2" framing of the U.S.-China relationship, suggesting a shared approach to global trends and responsibilities.

By contrast, in a challenge to Beijing, the Trump administration announced in December one of the largest U.S. arms sales to Taiwan in history, replete with items like precision munitions and drones that have proved effective in the brutal killing fields of the Ukraine war. And he has attempted to maneuver out from under the Sword of Damocles that China holds over the United States in the form of its monopolies of critical minerals and rare-earth magnets.

The administration's published documents and its senior figures' statements provide little help in resolv-

ing these contradictions. Certain references to China appear to have been hastily edited out of Mr. Trump's National Security Strategy. When administration figures do, on rare occasions, venture some version of a China strategy, they fall back on bromides like "Our policy is a policy of American power with America first at its core."

All of this ambiguity can cut one of two ways. It may help Mr. Trump to negotiate with Mr. Xi over long-term American interests when the two meet later this year. If Mr. Trump is just maneuvering for his short-term political and personal interests, however, the damage to the United States will be lasting. As the administration prepares for those meetings, it is crucial that it takes the first, strategic path. Even if it does, the approach carries risks.

"Strategic ambiguity" has a tortured history in the U.S.-China relationship. It refers to the longstanding and intentional uncertainty over whether the United States would come to Taiwan's aid militarily in the event of an attack by China on the island. This ambiguity has allowed Washington to balance engaging Beijing and preserving links with Taiwan, simultaneously warning both of them not to rock the boat.

The Trump team has taken strategic ambiguity to a profound new level. There is now a much larger uncertainty over whether, when the chips are down, the president will side with China's authoritarians or align with America's traditional opposition to adversaries seeking to dominate the Indo-Pacific. Strategic ambiguity in the Taiwan Strait context has been an imperfect but workable vehicle for deterring provocation and preserving peace and stability. There is anxiety now, however, that strategic ambiguity applied in the larger U.S.-China context might lead to accommodation, even appeasement, of an increasingly ambitious China.

Mr. Trump's strategic ambiguity has



HAN-YU JIANG/THE NEW YORK TIMES

certain advantages. First, it keeps China off balance about Washington's ultimate intentions. Mr. Xi has managed Mr. Trump more effectively in his second term than in his first, treating the U.S. president personally with great respect while responding to every blunderbuss tariff threat with a precision countermove that exploits American vulnerabilities. Yet Beijing remains uncertain and worried about what Mr. Trump might do under duress. Mr. Xi is confident that the correlation of global forces favors Beijing in a longer-term contest with the U.S. but is still deeply wary of Mr. Trump's ability to surprise and suddenly shift course in the near term.

Strategic ambiguity has certain domestic political advantages for Mr. Trump as well. China policy is one of the few areas where Republicans in Congress have found a tremulous voice to criticize the administration, reproaching its softer moves toward Beijing. Ambiguity keeps them hoping for a turn back to hard-line moves. The Trump administration's big tent on China includes some top officials who are bent on securing commercial

deals and others who believe that China poses an existential threat to America. The president's strategic ambiguity accommodates these conflicting positions and agendas, albeit while triggering brutal bureaucratic infighting, by suggesting that it is merely a clever way to get to the ultimate destination of a hard, or a soft, relationship with China.

For all of its advantages, however, ambiguity toward China carries more risks than rewards. U.S. strategy in the Indo-Pacific in the 21st century has rightly focused on building allied solidarity and military capacity through shared diplomatic approaches and combined technological prowess. Ambiguity doesn't help that. The Trump administration's harsh tariffs on America's traditional partners may be manageable, but a true G2 world, dominated by the U.S. and China, would be untenable for America's allies in the region.

Mr. Trump's mixed messages already have partners from Tokyo to New Delhi scouring his utterances and actions for signs that Washington can still be counted on. Countries such as Japan and India want badly to be reassured and are seeking to sway Mr. Trump. Yet at some point, allies will make stark decisions about their security — including potentially pursuing nuclear weapons or alliances with other countries.

At home, Mr. Trump's ambiguity has helped to fracture the last true area of bipartisan consensus in American foreign policy: a tough, competitive framework for relations with China that has prevailed for the past decade. Now some corporate Republicans, largely from the investment world, along with liberal-minded academics and think-tankers, have defected in favor of a softer, more collaborative approach akin to the one that was dominant in the 1990s heyday of U.S.-China engagement.

Whether Mr. Trump's ambiguous

approach is worth the risk ultimately depends on his goals. Those will become clearer this year. Mr. Trump and Mr. Xi are set to meet, potentially, on several occasions before year's end, and administration advisers frequently refer to the prospect of a "comprehensive and ambitious" set of outcomes during the president's expected visit to China in April.

The U.S. side has signaled that it badly wants short-term wins on exports of agricultural products and curbs on the flow of fentanyl, to address domestic political needs. China appears to be angling for bigger game, seeking access to advanced technologies while weakening Taiwan's democratic leadership. Big U.S. concessions on Taiwan and technology in exchange for nominal Chinese purchases of legumes and restrictions on drug flows would be a manifestly bad deal. That could pave the way for Chinese hegemony in the western Pacific, with the U.S. ceding control over crucial global trade routes and leaving its allies vulnerable to coercion by, and eventually forced capitulation to, Beijing.

It is not an exaggeration to say that the course of the 21st century may depend on whether Mr. Trump's ambiguity is strategic or merely tactical. If Mr. Trump is playing a long game in hopes of improving America's increasingly weak military and economic hand, then his ambiguity may well prove to be a cunning strategic gambit to keep the United States ahead of its primary global competitor. If he is instead just shoring up his political position at home while appeasing China, the costs for Americans now and in the coming decades could be catastrophic.

KURT CAMPBELL served as the deputy secretary of state from February 2024 to January 2025. He previously was the Indo-Pacific coordinator at the National Security Council in the Biden administration.

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OPINION

The New York Times

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Why A.I. can't make thoughtful decisions

Blair Efron

In college I took a medieval studies seminar on the origins of British common law. There I learned how chancery judges in 14th-century England decided property disputes by applying their own reasoning when testimonies conflicted and records were unclear or incomplete. It was a formative class for me and one whose lessons I return to often. It has remained critical in my work advising companies, even though it didn't contain a single number, management principle or economic theory.

Artificial intelligence is poised to profoundly affect American business, and executives are rethinking the skills they seek in colleagues and advisers. For my part, I'm reminded of the value of an education deep in reading, research and analysis — one that teaches how to approach problems with no definitive answers.

My college education taught me how to think, not what to think. That is what proves most useful when navigating strategic and financial decisions in a technology-driven world. Today, A.I.

Computers still don't do well with vagueness and uncertainty.

is near the center of every boardroom discussion I witness. Roughly half the S&P 500 companies mentioned A.I. on their most recent earnings calls, and they speak of the new technology as a force that no serious institution can ignore.

There is little doubt A.I. will be transformative. And yet, for all the disruption it promises, I am struck by how much will remain unchanged. The most consequential decisions in business have never been about processing information faster or detecting patterns more efficiently. The most salient concerns are questions such as what kind of enterprise a firm should aspire to be, what culture it should embrace, what risks it should tolerate and how its leaders can plan when the path forward is unclear. These are questions of judgment, and judgment cannot be automated — at least not any time soon.

What do I mean by "judgment"? The capacity to arbitrate among competing values and differences of opinion, to weigh considerations that matter independently but cannot be satisfied all at once, to consider several paths of action to alight on the best one. Judgment is the faculty we rely on when trade-offs are unavoidable and the right answer is not waiting to be computed. It is a uniquely human skill.

Not long ago, a client was seeking to sell a portion of its business to raise capital. The company faced a choice: offload a high-growth unit that was volatile and not central to the business or a slower-growth unit that better aligned with the company's mission. An A.I.-assisted analysis recommended selling the slow-growing busi-

ness, which made sense in purely mathematical terms. But judgment dictated the other path: Sell the volatile unit and improve the other one.

Even though it's too soon to know which path will be correct, I was struck by the certainty of A.I.'s answer.

A.I. excels at pattern recognition, code generation and the synthesis of large volumes of text and data. But someone still has to decide whether an analysis is trustworthy, what implications it carries and whether acting on it would be wise. Someone has to connect the output of a model to the broader context, such as the political environment, the regulatory landscape and the human dynamics at play.

Last year a board wanted to know how much it should offer for a business it wanted to buy. We fed a huge amount of data into an A.I. model, which suggested a valuation that seemed low to me. The chief executives of the two companies had a fraught relationship, and we debated whether the deal price would need to be higher. Sure enough, when the company offered the A.I.-recommended price, it was rejected. The higher price was later accepted and the transaction secured. The model could not account for the interpersonal dynamics. Judgment could.

This is why I doubt that A.I. will soon match human cognition or that the defining skills of the next generation of professionals will be narrowly technological. Technical fluency matters, of course. But in a world of abundant machine intelligence, the most durable advantage will be broad intellectual range.

There is a tendency in higher education and in business to push people toward specialization. A.I. accelerates that pressure. If a machine can do the general work, the conventional wisdom goes, humans should retreat to the specific. I believe the opposite. As routine analysis becomes automated, what distinguishes professionals is the ability to synthesize across domains, to see patterns that specialists miss, to exercise judgment.

Today, when hiring, leaders I know look for what might be called a generalist with judgment, someone analytical and adaptable who is nimble enough to learn skills and become reasonably conversant in new knowledge. What the best candidates share is a quality no machine can replicate. They think independently, navigate ambiguity without waiting for instruction, analyze the questions that were not asked but should have been and own their decisions. They use A.I. — as a tool but not a crutch.

That medieval law seminar of long ago helped prepare me for this world more than my courses in finance and economics. Just as centuries ago those judges rendered decisions amid reasonable disagreement, where evidence was mixed and incomplete, professionals today must possess the skills to make things better where machines cannot.

BLAIR EFFRON is a co-founder of Center-view Partners, an investment bank.

The dream palace of the immigration hard liners



Ross Douthat

In the past few days, as the shooting of Alex Pretti has incited a change of tone and of personnel in the Trump administration's immigration crackdown, some of the White House's supporters have written laments for what they see as a fatal loss of nerve. Their theme is that any concession to protesters will just encourage the same opposition tactics in every state and city, which will eventually make all internal immigration enforcement impossible, nullifying both federal law and Trump's 2024 victory.

As for those Republicans who look at the street chaos, the growing political backlash and the two dead American citizens (so far) and think that there has to be a different way, the conservative podcaster Mark Walsh parodied their stance as follows:

This ICE situation is really complex. My take is more nuanced. I want our immigration laws to be enforced, but I just want them to do it without using any force, and without anyone ever getting hurt, and without anything sad or upsetting happening ever, and if the people we're trying to deport don't want to be deported, or if liberal activists don't want us to deport them, then obviously in that case we shouldn't do it, but I'm totally a conservative on the issue, unless people get really mad at me then never mind please don't yell I'm sorry.

I'm squarely in the camp that Walsh is satirizing, since my position at the moment is that the Trump administration was entirely correct to prioritize deportations after the collapse of immigration enforcement under his predecessors, but that misplaced priorities and excessive brutality have created a debacle and that simply doubling down will make things worse. So let me make a brief case for that view — that enforcement is necessary, this approach to enforcement is bad, and a different course is possible.

Start with the points that Walsh gets right. It's true that you can't have sustained immigration enforcement without also having upsetting cases and sympathetic deportees. If you deport illegal immigrants with families, you will have to choose between family separation and deporting children. If you conduct arrests in homes and neighborhoods, you will be accused of traumatizing kids and communities; if you conduct them in workplaces, you will be going after the hardest-working migrants. If you focus only on immigrants who have run-ins with the law, you'll end up deporting people with minor infractions. And so on.

It's also true that any deportation program will meet resistance from people — activists, lawyers, protesters — who basically don't want you to deport anybody, and that certain liberal jurisdictions are in a state of permanent noncooperation with federal immigration law. Even when it comes to violent criminals, the sanctuary-city position is effectively that they should be jailed but not deported — or to quote Mayor Jacob Frey of Minneapolis this week, doubling down on his city's refusal to cooperate with federal deportation efforts, "Violent criminals should be held accountable based on the offenses they committed, not based on where they are from." That means that even if your policy exclusively targets criminals, you still have to send agents into liberal jurisdictions where local officialdom is hostile to your efforts.

There are conflicts here that can't be

waived away. But the fact that some backlash and resistance are inescapable doesn't mean that all enforcement strategies that generate backlash are sound or wise. To the contrary, precisely because immigration enforcement is difficult, there are basic things you need to do to pre-empt backlash, to reassure the general public and to make your critics look extreme. And the Trump administration's immigration enforcers have often done the opposite of what both political wisdom and decency require.

First, they have deliberately played up the tough-guy aspect of enforcement, asking agents to generate footage of arrests and detentions, layering on hip-hop soundtracks for social-media clout, as though the

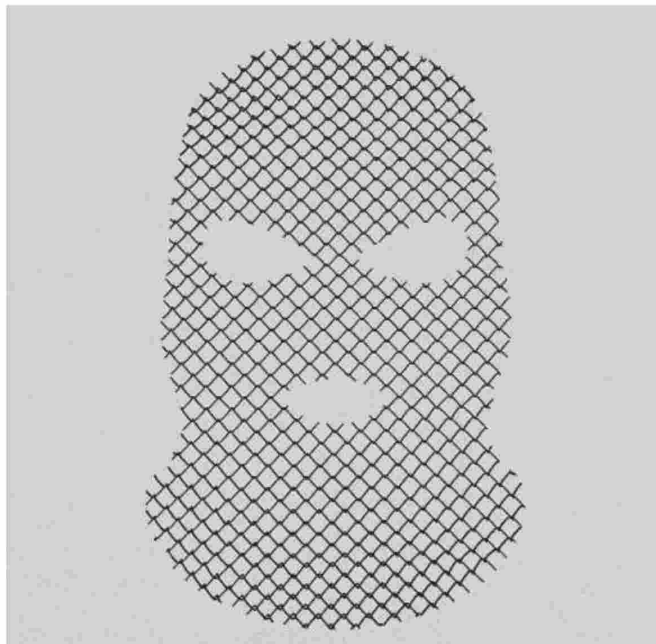
specific raids and targets and interactions with protesters. The administration's political problem isn't only that ICE agents sometimes make mistakes or that law enforcement operations sometimes yield tragic deaths. It's also that when something does go wrong, it gives the public no reason to believe that it's taking the problems seriously. The default is always to blame a cabal of enemies instead.

Again, such cabals do exist, in the sense of activist groups seeking dangerous confrontations and aiming for interference as well as protest. But now we reach the third great failure of the administration: the nature of the Minneapolis operation, which was conceived with transparent political motivations on a scale guaranteed to

all the time, resulting in a siege mentality that made the activist task of mobilization infinitely easier.

This list doesn't even touch other strategic failures, like why the administration has chosen to privilege ICE roundups over workplace sanctions. But just these critiques suffice to amend the Walsh caricature as follows:

I want our immigration laws to be enforced, but I want the government to do it without cutting advertisements that make it look like it's in love with its own punitive powers, without constantly dissembling and shouting about internal enemies and acting like its own errors don't exist, and without enforcement operations creating a police-state atmosphere for a major metropolitan



SAM WHITNEY/THE NEW YORK TIMES

public's support for immigration restriction were actually a demand for Jerry Bruckheimer videos of shackled migrants. Nobody watching these videos would think that this is an agency working carefully and authoritatively and acting more in sorrow than in anger. Just as important, nobody watching these videos would

think that protesters carrying cellphones were injecting a media-circus element into a purely professional operation. The operations themselves look like hype jobs, and

by the administration's own choice — a choice tailored not for the G.O.P. base as a whole but for a small and hyper-online constituency.

Second, the enforcers have repeatedly established themselves as unreliable narrators. The extreme case of Pretti, in which officials denounced the dead man as a terrorist bent on mass murder before any kind of investigation, is just the starkest instance of a larger pattern of unreliability about

catalyze a much larger political reaction than anything that activists could generate alone.

Minneapolis is not an especially large city, and it doesn't have an especially large number of illegal immigrants. It was targeted because of recent revelations about fraud in the Somali community and the link to Tim Walz, the governor of the state — but since ICE doesn't investigate fraud, the predictable effect was to direct attention away from those stories and onto immigration enforcement.

Then along with that own goal, the actual enforcement campaign created a different feeling in the affected region than ICE's operations did in the larger landscapes of Los Angeles and Chicago — a sense of citywide occupation rather than targeted intervention. Some conservatives have argued that Minneapolis has attracted more media attention than earlier operations because the activists are perfecting their methods of resistance. There may be truth to that, but based on my conversations with people in both L.A. and Minneapolis, the biggest difference is that in Minnesota ordinary people started encountering masked agents

area that lasts for weeks.

To Walsh and other advocates of permanent confrontation, maybe even that reformulation sounds like hapless surrender. But to me, these people are constructing a dream palace where polling and mainstream opinion don't matter at all, where just showing strength is enough to carry waverers and anxious normies with you, where a magical final victory awaits that doesn't require compromise or coalition management.

The woke weren't bound by polls and public opinion, comes the reply. Yes, and look what it got them: a decisive electoral defeat and a generational opportunity for conservatism, which the Trump administration has been giving away, piece by piece and controversy, since the "vibe shift" days of late 2024.

But even Trump knows that it's a bad idea to crack your own coalition, and to risk letting your polling sink below its normal lows. His apparent willingness to take a step back isn't weakness. It's a small dose of a wisdom that the right needs in far greater measure before it's actually equipped to rule.

We all must save NATO from the president

SHAHEEN, FROM PAGE 1

and economic stability at risk. In this environment, allied unity is not optional; it is a strategic necessity. Yet leaders of Arctic countries now speak openly of a "rupture" in our longstanding security and economic relationship.

Instead of strengthening our alliances, threats against Greenland and NATO are undermining America's own interests.

Suggestions that the United States would sue or coerce allies to sell territory do not project strength. They signal unpredictability, weaken deterrence and hand our adversaries exactly what they want: proof that democratic alliances are fragile and unreliable.

Similarly, the on-again, off-again specter of tariffs and a trans-Atlantic trade war does not provide meaningful negotiating leverage. It spooks markets, wipes out wealth, distracts from higher priorities and erodes the trust we have built over decades.

In the midst of this, one crucial actor is hiding in plain sight. The U.S. Congress bears responsibility for reinforcing constitutional guardrails on

the Trump administration's policy toward NATO, with respect to both Greenland and to safeguarding our intertwined economic and security interests.

Congress cannot be a bystander when the stakes involve the sovereignty of an ally or the future of NATO. We have tools at our disposal to assert our authority and make clear to our allies that we will not tolerate further threats against them.

One immediate step is to legally block any potential attempt to seize or coerce control over allied territory. That is exactly what our bipartisan NATO Unity Protection Act does. It prohibits taxpayer dollars from being used to blockade, occupy, annex or otherwise assert control over the sovereign territory of any NATO ally without that ally's consent and approval by the North Atlantic Council. This is a necessary safeguard against an administration that has repeatedly shown it is willing to act first and explain later.

Pre-emptive legislation is unfortunately necessary. Our fellow lawmakers have a choice: assert their constitutional authority or wake up to deci-



DANIEL TERNIA/THE NEW YORK TIMES

sions that have already been made without them.

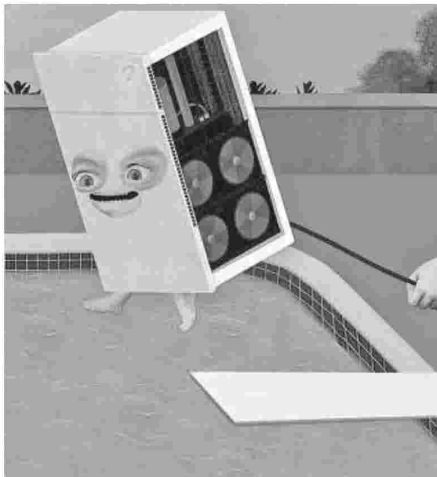
During our recent visit, a Danish American approached one of us after a public event. She told us she worries

that her son, who holds both Danish and American citizenship and is nearing Denmark's conscription age, might one day be forced to choose between the two countries he loves. We heard from Greenlanders who can't sleep, and who told us that their children are crying amid fear of invasion — not from China or Russia, but from the United States.

That fear would have been unthinkable just months ago. Today it is becoming part of how people in allied nations talk about the United States, and it is profoundly undermining America's national interests.

This is not the future Americans want, and it is not the future we should accept. The United States has spent generations building alliances based on shared values, mutual respect and the rule of law. Those alliances remain our greatest strategic asset. The question now is whether Congress will defend them.

JEANNE SHAHEEN is the ranking minority member of the Senate Foreign Relations Committee. USA MURKOWSKI is a member of the Senate Appropriations Committee.



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EDITORIALS

The Midwest is becoming a population magnet again. Here's a chance for Illinois to grow

The census data just released brought fantastic news for us hale and hearty Midwesterners: We're growing.

It's true. Our mighty region, overlooked — and often looked down upon, particularly by our coastal compatriots — was the one region in the U.S. where all states saw population growth from July 2024 to July 2025.

The region's population grew by 244,000 in that period, marking four consecutive years of growth, and, notably, the Midwest posted positive net migration from other states for the first time this decade.

A handful of states, including Indiana, Iowa, Minnesota, Missouri and Nebraska, have seen population growth each of the past five years. Among the biggest turn-arounds, however, were turned in by Big Ten rivals Ohio and Michigan, which had previously been in a population slump marked by negative net domestic migration and worrisome natural population declines — more deaths than births. That's turned around, and we're pleased for the Buckeyes and Wolverines as they bask in this good news.

But what about us? Illinois has grown, too, but far more modestly. The state added about 16,000 residents in the year ended July 1, 2025, down sharply from 70,000 the year before, and we still have fewer residents than we did in 2020. That's progress. Of a sort. But nothing to brag about.

Our broad take: It's heartening the Midwest is more attractive than it used to be. That's really good news for population-challenged Chicago and Illinois. It will help immensely in reversing those trends here if the wind is at the back of the region of which Chicago is the unofficial capital.

But that doesn't mean Illinois will take advantage of it. Our political leaders have a chance now to seize this regional momentum and make Illinois and Chicago the destinations they should be.

We've written before on some of the many reasons Illinois is stuck in the mud when it comes to the number of people living and working here.

One of the primary recent reasons is beyond the state's control, and that relates to one of the more important disclosures from the Census Bureau: U.S. population growth has slowed markedly, and while it remains true that the low birth rate is a major driver, the real shift in this latest report is that the country is seeing



People walk on the Ping Tom Memorial Park trail as pockets of sun illuminate the Chicago skyline on Jan. 10. JOHN J. KIM/CHICAGO TRIBUNE

a "historic decline in net international migration," as the bureau puts it.

Illinois' international migration fell by about 60% from 2024 to 2025, a sudden slowdown that exposes an underlying weakness in the state's ability to grow.

Domestic migration remains a significant drag on growth here, too, with more residents leaving than people coming here from other states.

This is the component most responsive to state and local policy.

In our region, Missouri and Indiana were the clear winners in terms of generating positive net domestic migration last year, with Wisconsin right on their heels. Illinois would do well to look at what its neighboring states are doing to make themselves more attractive.

In some respects, our problems aren't unique. Taxes, especially property

taxes, remain a major complaint among Illinois residents, a concern that polling has consistently shown to be a leading reason people consider leaving the state.

Fiscal uncertainty, both at the state level and in Chicago, is an impediment as well. Even when the tax burden is onerous, newcomers often will choose to come if they feel confident those levies won't rise substantially in the near future. Chicago and Illinois, unfortunately, have been unable to offer such assurances.

Illinois also is widely perceived as a costly place to do business from a regulatory and tax standpoint. Our long history of high-profile corruption scandals doesn't help matters, although we hope the recent convictions of political powerhouses such as former House Speaker Michael Madigan and former Chicago Ald. Edward Burke will begin to lift that

cloud.

After years of stagnation, Ohio and Michigan have responded by signaling they want growth, moving faster on permitting, leaning into housing affordability and marketing themselves as predictable places to spend and build.

Despite facing many of the same challenges, Illinois has not responded, playing defense as governments face budget-busting pension debts and long-term obligations.

What appear to be the beginnings of a Midwestern resurgence gives Illinois a chance to reset and get in the game along with our neighboring states. There's no reason, given Chicago's clear preeminence among Midwestern cities and an abundance of infrastructure and natural resources, that Illinois shouldn't be leading the charge.

Secretary of State Giannoulias puts e-bike safety on the table

Where do e-bikes and e-scooters belong? On the sidewalk? On the road? And who should be allowed to drive them?

As use increases across the city and suburbs, the need to establish broader rules has become apparent. Too often, these vehicles become a menace when used at high speeds or in places they don't belong.

After a suburban Mount Prospect teenager died after his e-bike crashed into a truck in September, we called for sensible regulations to protect walkers, drivers and e-bike users alike.

Different local governments across the state have created a patchwork of rules and regulations that differ in various ways.

And while some suburbs have responded already, not every local government has taken up the issue.

So we were pleased to hear Secretary of State Alexi Giannoulias' Thursday announcement of a new initiative to address rising injuries and deaths tied to high-speed e-bikes and other powerful electric devices.

We've argued that sensible rules for e-bikes and e-scooters begin with clarity and safety: clear categories based on speed and power, limits on where and how fast they can travel and commonsense requirements such as helmets, lights and proper parking. Giannoulias is working with state Sen. Ram Villivalam, D-Chicago, and state

Rep. Barbara Hernandez, D-Aurora, and the potential legislation seems poised to incorporate many of these principles, though the specifics are still a work in progress. In addition to rules regulating e-bikes and e-scooters — sometimes referred to as micromobility devices — Giannoulias has said his proposal would pair regulation with education by expanding micromobility instruction across K-12 classrooms and high school driver's education, giving students and new drivers clearer guidance on safely sharing the road.

Granted, we still need to see the legislation, but these ideas broadly make sense. The problem with e-bikes is that the high-

er-speed models are not really bikes at all, but function more like motorcycles. Yet under Illinois law, teens can ride many classes of e-bikes without the licensing or training required for motorcyclists. Most electric bikes can cruise at speeds up to 28 mph, depending on the class and model.

We are not letting teenaged motorcyclists out on our roads without oversight. So why is it different for electric bikes?

These devices should certainly not be outlawed, as some have called for, but regulated sensibly. We think this new statewide proposal has the potential to bring some needed clarity — not to mention improved safety.

ON THIS DAY 126 YEARS AGO NEW CONDITIONS IN WISCONSIN

With the exhaustion of the pine forests that have been the chief source of northern Wisconsin's wealth in the past and the creator of a dozen enormous fortunes a new order of things has taken possession of the Wisconsin River Valley.

A score of thriving towns and cities have sprung up which owed their origin entirely to the pine industry.

People used to ask: "When the pine is gone what then?" The Milwaukee Sentinel answers in a review of the industrial situation in that part of the State. Instead of the pine the hardwoods are being used and made into the finest furniture, one kind of wood, the red curly birch, ranking second only to mahogany and rosewood.

But the giant water powers are the chief resource. In the Wisconsin Valley are a dozen water powers that will each develop 5,000 horse-power, half a dozen with 10,000, while one near Merrill by actual survey shows 30,000.

In the utilization of this water power has been found the solution of the problem of existence in the cities.

Besides, the cleared land has been found excellent for farming and is being tilled by skilled farmers. The climate is so healthy that popular summer resorts have arisen.

The result is a thriving population that can, with equanimity, view the vanishing of the great pine forests.

Tribune editorial board, Jan. 30, 1900

EDITORIAL CARTOON



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OPINION

What are Mayor Brandon Johnson's plans for stopping abuses by immigration agents?



David Greising

A bright orange whistle has become the symbol of resistance to federal immigration agents in Minneapolis, Chicago and other major cities.

This week, Chicago Mayor Brandon Johnson sought to blow the whistle in a big way by calling for action in a speech to the National Press Club in Washington.

"As a nation, we have to really look at the model that was set during the Civil Rights Movement. We need a well-trained, organized opposition to ultimately expand the resistance that is already afoot in the country," Johnson told the Press Club on Wednesday. "Saving our democracy is the most patriotic thing we can do in this season."

But if this was Johnson's big moment to issue a call, unfortunately, it was a whimper. He recited a litany of past actions but set no plan for what to do next.

Maybe that's because he sequenced his effort backward. First, the big national speech; next, planning meetings at the U.S. Conference of Mayors; then, at some undefined time — two weeks, maybe, as is the trend in D.C. these days — he'll unveil a master plan for Chicago that could be a pattern for the country.

There may yet be time for Johnson to offer concrete details and seize the national spotlight again. But to get to where Johnson and his fellow mayors need to go, rhetorically and as leaders, they have work to do.

For starters, they need to reckon with how the power dynamic of the current immigration struggle contrasts with the civil rights era.

In the days of the Rev. Martin Luther King Jr. and others, the federal government imposed its will on the racists running cities and states, in a drive toward racial equity that delivered major progress.

President Dwight Eisenhower federalized the Arkansas National Guard to ensure safe entry of the Little Rock Nine into Central High School, and the federalized Alabama guard pushed Gov. George Wallace out of the schoolhouse door at



Chicago Mayor Brandon Johnson speaks during a news conference at City Hall on Tuesday. CHRIS SWEDA/CHICAGO TRIBUNE

the University of Alabama. The FBI and Department of Justice ultimately brought justice to the Klansmen who perpetrated the Mississippi Burning murders.

Today, though, the power of the federal government is at times arrayed against constitutional order, the rights of free speech and assembly, and even the power of local authorities to police their own streets. And before Border Patrol Cmdr. Gregory Bovino was demoted, federal agents were using the modern-day equivalent of water hoses and police dogs and worse — to subdue the public. And they were egged on by cheerleading from Homeland Security Secretary Kristi Noem and the nothing-to-see-here response of Attorney General Pam Bondi's DOJ.

White House border czar Tom Homan on Thursday promised a more restrained approach by Immigration and Customs Enforcement and other border control forces going forward, after the two killings in Minneapolis this month and the outrage that has followed. He seems aware that most Americans support reasonable enforcement of immigration laws, but not the reckless excesses of federal power we are seeing.

We should know by this spring whether Homan can restrain the forces of chaos that have seized ICE lately. And as a

measure of protection, cities such as Chicago still need to prepare for a return to Bovino-style overreach, just in case.

After all, when the DOJ fails to investigate the agents who killed Alex Pretti and Renee Nicole Good, emboldened by Vice President JD Vance's initial claim that federal shooters could be protected by "absolute immunity," local authorities are left to investigate and prosecute on their own — with the expectation they will be hamstrung by a lack of federal cooperation and likely resistance.

Johnson is calling for coordinated national efforts led by mayors and state governments, in concert with public pressure groups and local residents, to combat the actions by ICE, the Border Patrol and other federal authorities.

During his D.C. appearance, Johnson promised detailed ideas will be coming soon. As to why this is taking so long — Operation Midway Blitz started in September, after a rhetorical windup by the Donald Trump administration — Johnson did not say.

What can Johnson and other mayors and governors do? For starters, they can take a page from the Trump administration's playbook and press their own powers to constitutional limits. Trump goes at least that far, and beyond, evidently under a

theory that the courts will have a hard time keeping up with — much less permanently prohibiting — many ICE actions.

There is no reason Chicago can't consider similar brinkmanship. And Chicago's track record against court challenges to measures taken so far offer encouragement that there is room for even more ambitious defense of state authority, local police powers and other constitutional rights.

A federal judge has recognized the right of the city and state to require federal agents to wear name tags or other identifying markers, for example. The Trump administration challenged Johnson's executive order prohibiting agents from wearing masks during enforcement actions, but the city's public safety and governmental accountability aims are being served for now, even if the courts don't back the city in the end.

Johnson's executive order to block use of city property for marshaling immigration agents and equipment remains in effect. And another ordering the Chicago Police Department to protect the free speech rights of protesters will be on hand should federal agents amass again in Chicago this spring.

Johnson has plenty of other tactics available for consideration: requiring federal agents to wear body cameras while working in Chicago, for example; requiring training standards for agents; ensuring that no agents are listed in the DOJ's National Decertification Index of nearly 60,000 former police officers who have lost the right to work in law enforcement because of misconduct.

The Brookings Institution listed more such ideas this week. No doubt Johnson and his mayoral allies in Los Angeles, Minneapolis and other cities have come up with other ideas during the Mayors Conference this week.

Johnson's headiest idea — criminally charging Bovino or whoever else might break the law — would be a test of federal versus state power that might be worth talking.

Johnson took a political risk by announcing plans to lay out ambitious steps in the coming days. Now he needs to collect his thoughts, set a plan and blow that whistle.

David Greising is president of the Better Government Association.

As immigration enforcement intensifies, CPS needs to share real-time data to protect students

By Daniel Anello

Last fall, amid heightened federal immigration enforcement, Chicago communities and schools mobilized quickly and creatively to help students get safely to and from school. These compassionate, community-led efforts were laudable — but given what is occurring in Chicago and across the country, we must be prepared to do far more for the city's children. Despite these amazing efforts, far too many students, particularly English learners and Latine students, stayed home. What began as a safety concern quickly became an attendance crisis.

If last week's actions in Minneapolis are any indication of what this intensified moment could bring, communities should brace for disruptions far greater than those seen in Chicago last fall.

Chicago Public Schools has struggled with attendance throughout the 2025-26 school year, continuing a pattern of chronic absenteeism that dates to the COVID-19 pandemic. A new report by the University of Chicago's Consortium on School Research reaffirms that attendance matters not only for learning and achievement but also for school culture and climate.

But today's challenge is distinct — driven by unprecedented actions being taken by the federal government, often in direct conflict with local governments. Without timely, transparent data, it is impossible to respond with the precision and coordination this moment demands.

CPS and the city should immediately begin sharing weekly absenteeism data, separated by English learners and non-English learners, at the districtwide and regional levels and searchable by grade level. Reporting according to individual schools or community areas is unnecessary and could risk singling out specific neighborhoods. But citywide and regional data would allow CPS, community organizations, funders and policymakers to align efforts and resources in real time.

The risks of sharing this data is minimal. Federal immigration actions are already concentrated in these regions. Without transparent, timely data, public attention has been muted, and coordination across CPS, the city and community partners has been more difficult than this moment demands.

However, having access to accurate attendance data would make it possible to prioritize and prepare high-risk communities. For example, Safe Passage could be



Volunteers participate in the Walking School Bus, which ensures children from immigrant families can walk safely to and from school, in the Albany Park neighborhood of Chicago on Dec. 18, 2025. ANTONIO PEREZ/CHICAGO TRIBUNE

expanded, routes to school incorporating designated safe havens could be established, and schools could establish sanctuary teams to serve as trusted points of contact for families. But we must understand where these sorts of tactics are needed.

Let's be clear: Students in Chicago (and in other cities across the country) are missing school because of fear tied to federal immigration actions. Schools and community groups have reported sharp spikes in absences during and immediately following enforcement activity.

Parents in our network describe being terrified, with some fearing their children, many of whom have legal status, could be used as leverage against family members. While there is no legal basis or precedent for such actions, rumors alone have been enough to keep children home and out of classrooms. Although enforcement activity in Chicago has temporarily slowed, federal officials have signaled renewed action this spring. We must be better

prepared next time.

The importance of children being able to attend school safely cannot be overstated. Decades of data show that school attendance is tied to better life outcomes, stronger economic participation, improved health and safer communities. This principle is so fundamental that in 1982, the U.S. Supreme Court affirmed the right of all children, regardless of immigration status, to a public education. To be clear, the U.S. government wants these children in school. The education of all Chicago children mustn't become collateral damage to immigration enforcement actions, regardless of how one views these actions.

Families also want their children in school. They trust schools to keep them safe and fed. What they fear is the commute to and from school. This is particularly true in neighborhoods, where many students are already struggling to overcome numerous barriers to their achievement.

We cannot address this acute, location-specific challenge without real-time data showing where and when students are missing school. Weekly attendance data is essential for precision, coordination between CPS and communities, and mobilizing additional support from philanthropy, city wards and community safety initiatives.

On behalf of thousands of CPS families living with daily anxiety, we urge the district to begin regularly sharing attendance data no later than February, in advance of an anticipated resurgence of federal immigration activity this spring. If CPS could share daily data during the COVID-19 pandemic so communities could respond accordingly, it can do so again now. For many Chicago families, this moment feels like a new kind of pandemic — and it demands the same urgency and transparency.

Daniel Anello is CEO of the nonprofit Kids First Chicago.

OPINION

How the Challenger explosion shaped a generation

By Harvey Young

Forty years ago, a space shuttle exploded. A teacher and her crewmates lost their lives. A generation of schoolchildren watched it happen live. I was one of them.

I was 10 when the Challenger ascended to the stratosphere before splintering into trails of white smoke. In real time, viewers like me learned that those white wisps meant that the shuttle had exploded. Although not immediately confirmed, we understood that the crew, including middle school teacher Christa McAuliffe, had died. Everyone knows that you can't parachute from a spaceship.

The 40th anniversary of the Challenger tragedy prompts us to pause and remember the sacrifices of the crew. It is also a chance to reflect on how the experience of seeing a tragedy unfold shaped the outlook of a generation.

McAuliffe risked her life so that children could learn about space. Admittedly, space travel didn't seem that risky in the early 1980s. Shuttle launches rarely merited prolonged attention in the national news.

It was this inattention to the United States' space ambitions that inspired stunt casting. A civilian was recruited to become an astronaut. To McAuliffe's credit (unlike some contemporary space tourists), she declined the label. Respectful of the rigorous education and decades-long training of NASA pilots, engineers and scientists, McAuliffe described herself simply as a passenger. Officially, she was a payload specialist. Her humility taught a lesson.

For kids in the 1980s, who watched "The Jetsons" in the morning, played with Transformers toys in the afternoon and saw "Back to the Future" in the cinema, it was obvious that flying cars and perhaps even a moon colony were on the horizon. If they had not happened by 2001, then they certainly could exist a quarter-century later when we would be unimaginably old, in our 50s. A teacher going to space fit the timeline. And then the Challenger exploded.

The 1980s were an odd decade in which to develop a generational worldview. Bill Cosby's television sitcom seemed to model family values and introduced a type of masculinity that supported the possibilities of girls and women. Cliff Huxtable was a girl dad with four confident daughters and also the husband to a successful lawyer.



A student bows his head as he pauses next to an impromptu memorial set up outside New Hampshire's Concord High School on Feb. 1, 1986, after a private service was conducted at the school for teacher Christa McAuliffe, who died in the Challenger explosion. *ELISE AMENDOLA/AP*

First lady Nancy Reagan identified marijuana as a gateway drug with the potential to shatter the dreams of children and urged us to "just say no." The fall of the Berlin Wall and the dismantling of the Soviet Union suggested that imperial conquest was a thing of the past. Although the television news always carried stories about incidents here or there, none rose to the dystopic level of science fiction movies (such as Arnold Schwarzenegger's "The Running Man") in which the American government sanctioned the killing of citizens on the streets.

The Challenger explosion was an awakening. It shook confidence in received narratives of safety. Over subsequent decades, we became inured to the possibility that the things and people in which we believed could prove untrue. From Cosby's court trials, to cannabis legalization, to the invasion of Ukraine as part of a Russian reunification strategy, to the many death-by-law-enforcement scenarios in American cities, our current moment looks and feels different than what a preteen might have imagined in the '80s.

And yet, there was something in that explosion that prepared us for the present. We witnessed death without seeing it. We saw McAuliffe, Dick Scobee, Michael Smith, Judith Resnik, Ellison Onizuka, Ronald McNair and Gregory Jarvis disappear. They vanished. The loss of life felt true even before official confirmation days later.

News coverage unable to explain the cause of the tragedy prompted folks to trust their gut intuition. These responses proved prescient. Members of this generation alongside their elders would find meaning in Stephen Colbert's neologism "truthiness" and, later, Donald Trump's "fake news." The coverage was neither false nor fake. The explosion happened. However, the information relay was slow; too slow for an audience desiring faster communication and quicker updates.

The explosion signaled that flying cars in every driveway and a moon colony would not happen in our lifetimes. As we encountered warnings about the depleting ozone layer, global warming and the threats of rising sea levels, the Challenger generation was compelled to consider the environ-

ment. A spaceship waiting to take us up and far away no longer seemed viable.

Finally, the disaster enabled us all to appreciate the honest, impactful hard work of teaching. As a society, we tend to overlook the impact of teachers except in moments of tragedy. We were reminded of this lesson — one that was promptly forgotten — during the COVID-19 pandemic. Back in 1986, McAuliffe had hoped that her participation would raise the prestige of the teaching profession. Post-mission, her aspiration was to travel the country and talk with schoolchildren about the wonder of space. Risk-taking explorers are not only in history books. They live in our present, walk among us and sometimes are the people standing at the chalkboard in your classroom.

As the Challenger blasted off and the shuttle launched skyward, McAuliffe had already achieved her goal. The anniversary of the Challenger explosion is a reminder of the crew's daring and enduring impact on a generation.

Harvey Young is a historian and cultural critic. He is a dean of the College of Fine Arts at Boston University.

VOICE OF THE PEOPLE

The NRA's outrage

I'm glad that the National Rifle Association and many Second Amendment advocates are outraged over Alex Prett's recent killing by Border Patrol agents in Minneapolis. However, their underlying logic for this rage is mistaken. Prett was not killed because he was legally carrying a gun. He was pepper-sprayed, knocked to the ground and beaten by federal agents before they realized he had a gun. The gun was safely removed prior to his killing. He was attacked and killed by federal agents for exercising his constitutionally protected right to protest government actions.

I would feel much more solidarity with the NRA, as well as the posers displaying the "Live Free or Die" flag, if they expressed the same outrage over the killing of Renee Good who was similarly exercising her right to protest, even though she was not carrying a gun.

— Peter Okkema, La Grange

ICE an embarrassment

I am really getting tired of people trying to spin the senseless loss of life that happened in Minneapolis at the hands of federal agents. During the course of my career, I graduated from two police academies and had countless hours of training regarding use of force. This training continued into the private sector when I managed executive protection for a major corporation.

There was absolutely no justification for the use of deadly force in this situation — none. If Alex Prett was breaking the law, agents should and could have arrested him and had him charged. Instead, they shot and killed him.

These are poorly trained men, and they must be held accountable for their actions. The entire organization should be disbanded and reorganized and its agents retrained. They can't continue to be allowed to act with impunity.

There is an absolute need for immigration enforcement, but it must be held to the same constitutional standards as any other law enforcement agency in this country. What is happening with these fools is painful and unnecessary, and U.S. citizens are being sacrificed over the incompetence.

Immigration and Customs Enforcement is an embarrassment to law enforcement, and it must end.

— Richard Williams, Highland Park

Kimmel's narrative

On Monday, I was heartened to see late-night host Jimmy Kimmel pay tribute to Alex Prett, tragically killed by federal agents. Yet what about Rachel Morin, Laken Riley and Jocelyn Nungaray — U.S. citizens killed by undocumented immigrants?

Recognizing all victims would offer a fuller picture, but apparently, that doesn't fit neatly into his narrative.

— David Tularian, Henderson, Nevada

Recall Rittenhouse

I have two words in response to Loren Monsees' letter ("Alex Prett's judgment," Jan. 28) chastising Alex Prett for leaving a loaded pistol on him while protesting the brutalities of federal agents: Kyle Rittenhouse. Does Monsees remember him? He was the 17-year-old who paraded the streets of Kenosha during protests of a police shooting. He openly brandished a long gun and killed two men and wounded a third.

— Paula J. Schneiderman, Chicago

Believe the science

I listened to a fascinating NPR podcast last Sunday, "Challenger at 40: Lessons from a tragedy" about the engineers who tried to keep their bosses and NASA from launching the space shuttle in too-cold weather, and the guilt they felt the rest of their lives because their warnings were ignored.

Contrast that with the report this week that the Donald Trump administration has secretly taken an ax to safety regulations for the construction and operation of new nuclear plants. Or proposed rollbacks of Environmental Protection Agency standards for air toxin standards for power plants.

Political pressure to launch brought about the Challenger disaster, watched in real time by school kids, among others. I guess President Trump and his deregulators figure they'll be long off the scene before the first "accident" or before radiation is detected in public water supplies or mercury in children's bones.

But, yes, instead of listening to politicians who swear it will be all right till it all goes wrong, maybe we should go back to believing the science we have learned

over recent decades.

— John Podulka, Wolverine, Michigan

SNAP requirements

Both Chicago newspapers reported on the same man, Kenneth Robinson, who finds his Supplemental Nutrition Assistance Program benefits imperiled with the requirement that recipients either work or volunteer so many hours a month. He speaks of his past as a hindrance to employment, but he is not required to work to receive benefits. He can take classes or volunteer.

It is not good public policy to just give people money on an ongoing basis. It's demeaning and discourages independence. Congress was right to expect at least something from SNAP recipients.

— Larry Craig, Wilmette

Call your senators

The not-so-Big Beautiful Bill is about to cause hunger to skyrocket and millions to lose their health care ("SNAP work requirements set to go into effect Sunday," Jan. 27). This is a policy decision by the current president and the majority party in Congress.

The people of America don't want to see their neighbors go hungry, lose their homes or be sick without health insurance. Why not call those who represent you, 202-224-3121, and tell them to turn around these catastrophic policy decisions?

There is no need for the world's wealthiest country not to care for all citizens, not just the rich.

— Willie Dickerson, Snohomish, Washington

Reality of policies

Imagine how it must feel to be a die-hard Donald Trump fan and wake up to realize that everything his opponents have been saying is, in fact, true.

Trump's tariffs (really, taxes, which we all pay for) have caused inflation to remain high. Meanwhile, China announced a record \$1.2 trillion trade surplus for 2025. While the U.S. started trade wars, China struck deals with Canada and the European Union, among others, to sell electric cars, and India and the EU just announced "the mother of all trade deals." We're left

on the sidelines.

Trump cut research to U.S. universities and prevented the best foreign students from attending them. Now, worldwide rankings show a drop in the rankings of U.S. universities. Schools that have seen the greatest increases include Chinese universities, as their "best and brightest" stay home.

Meanwhile at home, we have a K-shaped economy. Despite what Trump tells them, the Trump base — mostly rural and working class — struggles due to inflation and increasing housing and medical costs.

Farmers and ranchers must accept government handouts to offset the inability to sell their crops and cattle to foreign countries. Meanwhile, the wealthiest Americans enjoy Trump's tax cuts, which are creating massive deficits as our national debt skyrockets.

And now these Trump supporters must certainly realize, in light of the video evidence of the killing of innocent U.S. citizens in Minneapolis, that the Trump administration is, in fact, lying to them and that the federal agents in these cities are, in fact, goons.

"America First"? Hardly. Thanks to Trump's policies, America at home and abroad, and its future, has been severely, perhaps irrevocably, damaged. Have the Trump supporters woken up to this reality yet?

— Frank Kern, Chicago

Age cutoff for leaders

I no longer have any faith in voters. This thinking that voters should be the ones deciding age cutoffs is the same rhetoric we heard last year: Don't try to stop Donald Trump from running again; let the voters decide.

Well, we can see how that played out. Politicians need to retire at a reasonable age to ensure new and younger candidates can step up. These politicians who are in their 80s and now 90s continuing to run for office is absurd. They're out of touch in their bubble; they are no longer effective.

— Margaret Melville, Cedarburg, Wisconsin

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SPORTS

BY ANDREW BEATON

The New England Patriots and Seattle Seahawks will step onto the field in Santa Clara, Calif., next week for the right to call themselves one of the most unlikely Super Bowl champions in the game's history.

But no matter who wins, another team thousands of miles away is guaranteed to lose. That's because Patriots-Seahawks is the one matchup designed specifically for the psychological torment of New York Jets fans.

The Jets, who haven't reached the postseason since 2010, have the longest playoff drought of any team in the major American sports leagues. And the two teams playing for this year's Lombardi Trophy are here to compound their misery.

The Patriots spent two decades gleefully bullying the Jets, led by Bill Belichick and Tom Brady. And even with those two gone, New England has pulled off the kind of rebuild that has repeatedly eluded New York. The Seahawks, meanwhile, are being led into this game by the quarterback who was once supposed to be the Jets' savior—until they got rid of him.

Back in 2018, the Jets drafted quarterback Sam Darnold No. 3 overall, believing that they finally had a long-term answer under center. And although he turned the ball over too often, Darnold also demonstrated the rare type of playmaking ability that had made him one of the most sought-after prospects in the first place.

In classic Jets fashion, however, it didn't take long for his tenure with the team to feel cursed. During his second season, Darnold became a punchline when he had to miss three games with mononucleosis, commonly referred to as the "kissing disease." Later, during a disastrous game against the Patriots (of course) he was subject to more ridicule after microphones caught him saying he was "seeing ghosts" out on the field.

After Darnold's third season, the Jets cut their losses. Armed with the No. 2 pick in the draft, they traded him to the Carolina Panthers. Then they used the selection to replace him with Zach Wilson, whose poor play ultimately led them to a failed experiment with Aaron Rodgers.

During that time, Darnold bounced around the league from Carolina to San Francisco to Minnesota, while rebuilding his profile. In 2024, he broke out and led the Vikings to 14 wins. And when Seattle signed him this past offseason, he didn't miss a beat. Darnold fi-

nally proved he was the quarterback the Jets thought they had drafted.

But he isn't the only former Jet whose career changed for the better after leaving New York. The Seahawks' co-leader in sacks this season was Leonard Williams, the Jets' first-round pick in 2015.

Still, those regrets pale in comparison to the headaches Gang Green has suffered simply

Super Bowl's Biggest Loser: The New York Jets

When the Seahawks and Patriots play for the title, fans of Gang Green may want to look away



Sam Darnold, above, and Leonard Williams, below, are former No. 1 draft picks of the New York Jets.

by sharing a division with the Patriots. When Belichick quit as Jets head coach and took the job in New England, he wrote his resignation on a napkin. He then proceeded to post a 38-11 record over 24 seasons against the Jets, a spell that once included a 15-game winning streak. Outside of a single playoff victory 15 years ago, the Jets were powerless to stop the Belichick and Brady dynasty that produced six Super Bowl wins.

Even more excruciating to the

Jets is that the Pats were never supposed to be this good right now. But their return to the brightest stage means that New England has won three Super Bowls, rebuilt the entire team, and made it back to another Super Bowl in the time since the Jets last reached the postseason. And they've done it by unearthing another MVP-caliber quarterback in Drake Maye, who has the potential to torture yet another generation of Jets fans.

Whatever happens in the Super Bowl, either Maye or Darnold is guaranteed to hoist the Lombardi Trophy—and add insult to injury for Gang Green.

Jets fans might be better off watching the commercials.

He Gave Up \$75 Million To Play for the Mets



BY JARED DIAMOND

BO BICHETTE had the opportunity to sign a baseball contract this winter that would have left him, his children and even his grandchildren financially set for the rest of their lives. The Philadelphia Phillies offered him something around \$200 million to anchor their infield for the next seven seasons, ensuring that 27-year-old Bichette would never again need to think about his professional future.

But Bichette took a more orthodox approach.

He spurned the Phillies in favor of a different sort of deal with the New York Mets: just three guaranteed years, at \$42 million apiece, securing one of the largest average salaries in the history of the sport.

Plus, he has the right to opt out after the 2026 and 2027 campaigns and return to the open market, the kind of freedom that most employees could only dream about.

Phillies executive Dave Dombrowski called Bichette's seemingly unusual decision a "gut punch." But perhaps it shouldn't have been a surprise. Bichette isn't the only recent player to choose the same route, valuing flexibility and earning potential over stability.

Earlier this month, outfielder Kyle Tucker reportedly turned down a \$350 million, decade-long commitment with the Toronto Blue Jays in favor of four years with the Los Angeles Dodgers. The difference is the Dodgers agreed to pay Tucker \$60 million annually and gave him two opt-outs, turning the arrangement into an expensive

rental.

"Usually," Dodgers president of baseball operations Andrew Friedman said, "guys take those shorter-term deals because a longer-term deal hasn't materialized."

Then Bichette went and did the exact same thing. Baseball's compensation structure in many ways resembles most other businesses. Rookies straight out of the minors make close to the league minimum at first, only to see their bank accounts grow as they progress.

Only in a typical corporate environment, more seasoned workers have accumulated more skills and take on more responsibility to justify more money. In baseball, players generally see their performance peak in their mid-20s and begin to decline not long after their 30th

Bo Bichette signed a three-year, \$126 million deal with the Mets.

birthday. The result has been that teams tend to pay for what players have already done, not what they are expected to do.

So in recent years, many organizations have become more cautious about awarding long-term megadeals with massive average annual values to anyone besides the biggest superstars.

"They give you the years, but the AAVs are so low that it's not in your best interest," said Scott Boras, baseball's most prominent agent.

Representatives such as Boras have responded by proposing something of a compromise: Their clients would be open to a short-term contract, as long as the AAV was astronomically high.

Teams have been increasingly happy to go along. The old adage among general managers is that there is no such thing as a bad one-year contract. But now, GMs are taking that concept to the extreme, promising unimaginable salaries to players simply because they are willing to sign for fewer years.

Only nine players have ever signed contracts worth at least \$40 million a year, according to data compiled by Cot's Baseball Contracts. Six of them were for four years or fewer, including Tucker and Bichette. The exceptions were three generational talents: Shohei Ohtani, Juan Soto and Aaron Judge.

And some recipients of short

contracts have already seen the possible benefits.

Last offseason, the market for star third baseman Alex Bregman was softer than he had anticipated, in part because any team that signed him was forced to sacrifice a coveted draft pick. The best long-term deal available to him was from the Detroit Tigers at about \$28.5 million annually over six years.

Instead, Bregman went with a three-year, \$120 million pact with the Boston Red Sox that allowed him to opt out after each season. The gamble paid off. After a strong showing, he exercised that right and became a free agent again, this time with no draft pick attached to him. The Chicago Cubs signed him earlier this month for \$175 million over five years.

For teams, that uncertainty is the main downside. The Mets know already that their agreement with Bichette isn't really for three seasons. It's only for three seasons if he gets injured or plays poorly. If Bichette plays well in 2026, he is likely to opt out. His contract even calls for an additional \$5 million bonus if he chooses to do so.

At his Mets unveiling last week, Bichette was asked if fans should view his contract with New York as anything more than a one-year deal. Instead of answering, Bichette looked to his left at his agent, Greg Genske.

"Bo had his choice of long-term deals, shorter-term deals, opt-outs," Genske said. "The important thing to know here is he's coming here because he's committed to this team."

For 2026, at least.

0
Number of MLB games Mets third baseman Bo Bichette has played at third

OPINION

Trump's Cowbell Moment



POTOMAC WATCH
By Dan Chiasson
A Strassel

In Washington's Andrew W. Mellon Auditorium Wednesday stood the great and good of the Republican firmament—senators, representatives, governors, cabinet secretaries, the president himself. The occasion: the launch of the new Trump investment accounts for children. The look on participants' faces: relief.

Relief not to be talking about shootings in Minneapolis. Relief that Donald Trump delivered a whole speech with no mention of immigration (and only one of tariffs). Relief that they were finally—months late, possibly too late—talking about economic accomplishments.

Alarm has gripped Washington's GOP, as a White House never famed for focus has become obsessed with a few priorities—ones no longer doing Republicans any good. Poll after poll shows Americans are gloomy about the economy and want Washington to focus on growth, prices, affordability, jobs. Day after day, the Trump administration instead rides harder its hobby horses of immigration and tariffs.

The word most frequently heard in private Republican griping is "overkill." Mr. Trump came to office in 2016 promising GOP voters a tougher stance on immigration and trade deals. He delivered that in term one, from a

travel ban and border wall to the renegotiation of the North American Free Trade Agreement and targeted tariffs. Along the way he shifted the national debate—both within his party and more broadly. If the goal was a reset, mission accomplished.

That's one reason his initial work this second term to close the border to Biden chaos was a political home run. America craved a return to Trumpian border security, just as it looked hopefully to a redux of Mr. Trump's even bigger first-term accomplishment: economic vitality. Yet the lesson White House adviser Stephen Miller seems to have taken from border success is akin to Christopher Walken's in the famous SNL skit: "I gotta have more cowbell." Until a tinnitously deranged America finally rebelled.

Republicans began voicing concerns to the White House last fall, as stories about immigration raids, Alligator Alcatraz, National Guard deployments and daily tariff threats crowded out all else. They were reassured that 2026 would bring new focus, as the start of the reconciliation tax cuts and midterms. The House and Senate crafted a legislative package designed to highlight both the administration's accomplishments and the GOP majority's additional work on affordability.

January came. As did wall-to-wall coverage of a massive ICE deployment to Minnesota, presidential threats to invoke the Insurrection Act, a fatal shooting in Minneapolis, and other fatal shooting, fights

over the facts of those shootings, federal prosecutor resignations, Justice Department probes of Gov. Tim Walz and Mayor Jacob Frey, Portland violence, Louisiana raids and tariffs or threats against South Korea, Canada, and all of our North Atlantic Treaty Organization allies. Add in one narco-thug snatch, a Greenland grab and the launching of an "armada" against Iran. Thus January ends.

His accomplishments on the economy are drowned out by the Minnesota drumbeat.

No surprise that nobody noticed when the House passed a bill to reduce the cost of manufactured homes, which account for 11% of new single-family home starts. Or that national average gasoline prices recently hit their lowest level in five years. Tax filing season officially opened Monday, and refunds are on the way thanks to last year's tax relief—but whatever. And yes, the Trump accounts launch was a pretty big deal—if totally overshadowed by Tom Homan in Minneapolis. Is that enough cowbell?

It is for congressional and conservative Republicans, who have been fiercely lobbying the White House to get its priorities straight. One message to Mr. Trump: Your advisers' nonconformal focus on "zero tolerance" immigration policy is now actively doing you, and

us, harm. A second: We need all attention focused on our next economic steps. A third: This handing Democrats too many gift-wrapped wins. The left, still mired in resistance mentality, would have little to offer in response to a daily drumbeat focused on tax cuts, economic growth, Trump accounts, school choice, civil-service reform, emancipated cars and appliances and falling gasoline prices. But they have plenty to work with in Minneapolis shootings, or farmers getting pummeled by tariffs.

This is all part of this week's White House pivot. The president wisely looks to be widening his counsel beyond the cowbell crowd, leaving Mr. Miller and Department of Homeland Security Secretary Kristi Noem to point fingers at each other. Mr. Homan was dispatched to Minnesota to calm tension. The White House is talking with Senate Democrats about actions to ease through final appropriations bills and avoid another shutdown drama. The president flew to Iowa Tuesday to tout economic achievements and devoted much of Wednesday to the Trump accounts launch.

Will it last? That will be the day-to-day question and challenge. Democrats will do all they can to goad Mr. Trump into more confrontation, and an unfavorable Supreme Court decision on tariffs could tempt the White House to lash out. But much of the nation is sick of the cowbell, crying out for some economic harmony. Time to end the clanging.

Write to kim@wsj.com.

BOOKSHELF | By Tunku Varadarajan

The Mayor Was a Socialist

Bernie for Burlington

By Dan Chiasson

Knopf, \$92 pages, \$35

Dan Chiasson has an early memory of Bernie Sanders. It is 1981, Mr. Chiasson is 9, and Mr. Sanders is making his first run to become mayor of Burlington, Vt. "The doorbell rings. My grandmother yells across the house, 'Milford—it's SANDERS!' My grandfather shouts in reply, 'Dorothy—DON'T ANSWER THE DOOR!'"

The author is a Vermonter by birth; his mother was a divorced woman who raised him on her own. "Mom and I were not poor, because of her jobs and the generosity of my grandparents," Mr. Chiasson writes. But they weren't moneyed enough to afford an apartment of their own, so they lived for long stretches with her parents. As Mr. Chiasson recalls, his grandparents saw Mr. Sanders as "the final straw in their battle to uphold American values, a literal communist on our streets."

In "Bernie for Burlington," Mr. Chiasson, the head of the English department at Wellesley College, writes exhaustively and often beautifully—he is a poet, after all—of the years (1981-89) during which his countercultural hero was

the socialist mayor of his hometown. The author also describes the formative decades when Mr. Sanders—born in Brooklyn, N.Y., to unhappy blue-collar Jewish parents—scrapped his way through high school and college before moving to rural Vermont in 1968. Mr. Sanders was 27. Four years later, he had enough arrivist chutzpah to run for state governor as the candidate for the Liberty Union Party—a leftist Vermont grouping. He won only 1.1% of the statewide vote but noted that his support in the working-

class quarters of Burlington was much greater than in rural Vermont. Doing the political math, he abandoned his statewide aspirations and made the city his electoral prize.

Before winning the mayoral election as an independent in 1981—defeating the longstanding Democrat incumbent by less than two dozen votes—Mr. Sanders worked as a carpenter and as a journalist for the Vermont Freeman, an alternative paper. He was a prolific writer, darkly eloquent. In a piece from 1969, he offers a "montage," as Mr. Chiasson puts it, of his parents:

"The years come and go, suicide, nervous breakdown, cancer, sexual deadness, heart attack, alcoholism, senility at 30." Mr. Sanders's father, Eli, had emigrated at the age of 16 from Poland, where his family had often gone without food. Eli's life story, therefore, was one of survival, and he accepted his lot as a traveling paint salesman with a 3½-room house. His Manhattan-born wife, Dorothy, by contrast, "wanted a broader life." The couple fought constantly—the father stoic, the mother thwarted—and their fights were "unbearable" to their two children.

There is virtually no discussion in Mr. Chiasson's book—apart from some obvious hints and foreshadowing—of Mr. Sanders's subsequent political innings in Washington, first at the House of Representatives (1991-2007) and then at the Senate (from which he shows no sign of quitting). Let us be thankful, for this national part of Mr. Sanders's trajectory is less interesting than his pre-Washington years, when he made himself into a sui generis socialist—notably different from modern progressive politicians such as Elizabeth Warren, Alexandria Ocasio-Cortez and Zohran Mamdani. For all his hobnobbing with the Nicaraguan Sandinistas (including a visit to Managua as a sort of pesky up-yours to President Reagan), Mayor Sanders was a friend of small businesses and had the support of his city's police union as well as the National Rifle Association.

Mr. Chiasson sets about peeling back the layers on the palimpsest of Mr. Sanders's life. "This is a book of stories," he writes, "and a book about stories." It is more an excavation of the radical man's life than an account of it. Mr. Sanders refused to speak to the author but does not seem to have stopped others from spilling their beans to him. The poet in Mr. Chiasson chooses to see this "refusal to interfere" as "itself a kind of participation"—even a blessing. The "skein of historical fact, local lore, best-guesswork, and poetry" that comprises his book "depended on its subject's remaining silent and on the sidelines."

Bernie Sanders made a small dent in Vermont's 1972 gubernatorial election. But his support in working-class Burlington portended his future.

There is, of course, a rich paper trail, and the author made avid use of the Sanders mayoral archives at the University of Vermont. And he compensates for Mr. Sanders's silence by having "hundreds of hours of conversation with dozens of individuals"—including Bernie's loquacious older brother, Larry.

It was Larry, you might say, who set Mr. Sanders on his life's course. In 1954, he took the 13-year-old Bernie to the Vermont Information Center, in midtown Manhattan, where, Mr. Chiasson writes, "the air smelled of woodsmoke, cider, and maple syrup." The two teenage boys shared a bedroom in their meager little Brooklyn house, and on that day was born in Bernie's heart a lifelong dream to move to Vermont—green, clean, wide open and far removed from the drabness of 1950s Brooklyn.

Mr. Chiasson has written an admiring, even loving, account of the life of a man he observed from "a front-row seat." It's not a hagiography—the author is too astute for that, and he gives us too much of himself in the story for it to be a flat-out praise-song to another man. "I have left my point of view intact throughout this book," he writes, and that includes a calling out of Mr. Sanders' political stunts and character flaws.

Mr. Chiasson was 17 when Mr. Sanders left City Hall. During those eight years of Burlington politics, the author "lived in the middle of a very unusual American experiment." He calls it "cuddly socialism." Not all of us would have liked to live through it, but there's no small amount of pleasure in reading about it.

Mr. Varadarajan, a Journal contributor, is a fellow at the American Enterprise Institute and at New York University Law School's Classical Liberal Institute.

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A Hasidic Rebel Grows Up

HOUSES OF WORSHIP
By Natfali Mosler

When stories of fraud in Minnesota's Somali community began circulating, I grew concerned that the Haredi Jewish community, known to outsiders as ultra-Orthodox, would be next. Hours after Nick Shirley's video about the Minnesota welfare scandal went viral in December, I saw posts calling for investigations of Haredim in Kiryas Joel, N.Y., and Lakewood, N.J. The use of welfare benefits in these fast-growing towns, where many families qualify due to their large size, has drawn criticism before.

On cue, 26-year-old YouTube Tyler Oliveira published a 40-minute video, "Inside the New York Town Invaded by Welfare-Addicted Jews," a haphazard exposé of Kiryas Joel. Mr. Oliveira approaches townspeople on the street, asking what they do for a living, how many children they have, and how they support so many kids. Within a couple of weeks, the hostile video and clips from it racked up almost 30 million views across social media, setting off virulently antisemitic reactions.

Though Mr. Oliveira uncovered nothing resembling the fraud Mr. Shirley documented in Minnesota—or any crime at all—and even acknowledged the village's remarkably low crime rate, the implication was clear: that this strange community lives off American taxpayers and contributes little.

Years ago, I would have applauded this exposé. Much of the evidence circulating online about Haredi dependence on public assistance comes from reporting I helped produce as founder of the activist organization Yaffed. When Grok or social-media users cite statistics and articles portraying Haredim as leeches on the system, they often draw on work I regrettably contributed to.

What Grok doesn't tell you is that I no longer see the community the way I once did.

I grew up Hasidic and spent much of my adult life resenting it. I was angry that I reached adulthood without a strong secular education, and I was frustrated that I couldn't easily blend into mainstream life. So I made it my mission to expose the community's flaws, such as its educational shortcomings, its reliance on welfare programs, its insularity and its occasional scandals.

My general criticism was this: The law requires private schools to provide an education "substantially equivalent" to public schools, and Haredi schools weren't doing that. From this the community's other problems flowed and needed exposure.

I imagined an alternative life in which I grew up with the same opportunities as public-school kids and how much better off I might have been as a result. Then I became a father. When my eldest reached school age, I couldn't imagine sending him to a typical public school. I remembered what I had seen

while interning in public schools: classrooms where misbehavior went unchecked and political and ideological fads shaped curricula.

My wife and I ultimately chose a Modern Orthodox Jewish school with rigorous academics, serious Jewish education, and a community of families who shared our values. I realized something important. Education isn't only

I turned against my community but couldn't send my son to public school.

about math and reading. It's about belonging to a community that draws its strength from shared beliefs. This is something the Haredi world understands deeply—and something my uneducated culture has largely forgotten.

While outliers in many respects, the Haredim and towns like Kiryas Joel reflect how humans have lived for thousands of years: having children, building families, forming larger tight-knit communities, passing on values, and caring for one another.

Few groups in the U.S. have figured out how to build stable families and vibrant communal life better than the Haredi community has.

Are there real problems in the Haredi world? Absolutely. Secular education could be

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The Fed Chief Takes the High Road

By Gregg Opelka

Since January 2019, Federal Reserve Chairman Jerome Powell has held a press conference with Federal Open Market Committee meetings, taking reporters' questions roughly eight times a year.

Coming from a line of savings-and-loan executives (my grandfather, father and two uncles), and having worked in the family S&L in my 20s, I'm a stock market geek who watches every Powell appearance and hangs on every soft-spoken syllable. Wednesday's Q&A had several memorable moments, which highlighted his differences of character and persona with his antagonist in chief, President Trump. Two mini-speeches stood out.

The first Powell pearl came in response to a question from ABC's Elizabeth Schulze regarding the effect on American households if the Fed

"loses its ability to operate independently of politics." Mr. Powell's 90-second answer was as eloquent an apology for the separation of monetary policy from White House politics as you'll ever hear. Here's an excerpt: "Every advanced economy democracy in the world has come around to this common practice . . . to not have direct elected-official

Jay Powell's measured remarks contrast with Trump's fiery bluster.

control over the setting of monetary policy. . . . And the character and persona with his antagonist in chief, President Trump. Two mini-speeches stood out.

The first Powell pearl came in response to a question from ABC's Elizabeth Schulze regarding the effect on American households if the Fed

to a question from CNN's Matt Egan on what advice the chairman would give his successor. After a self-deprecating shrug and a pause to collect his thoughts, Mr. Powell said, "Honestly, I'd say a couple things. Number one: Stay out of elected politics. Don't get pulled into elected politics. Don't do it."

Then, he followed up with an encomium to his colleagues: "The last thing is, I will tell whoever it is, you are about to meet the most qualified group of people you not only have ever worked with—you will ever work with. . . . There isn't a better cadre of professionals more dedicated to the public well-being than [those who work at the Fed]." The entire exchange took all of 75 seconds, but it was packed with grace and merits a full listen. Mr. Powell's eloquent economy would have pleased Anton Chekhov who wrote that "brevity is the sister of talent."

OPINION

REVIEW & OUTLOOK

Tom Homan's Good Offer to Minneapolis

President Trump's border czar Tom Homan said Thursday in Minneapolis that he's "working on a drawdown plan" for the federal immigration surge there, which will be possible "dependent upon cooperation." It's an invitation to Democrats to help calm tensions by handing over deportable criminals in state or local custody. Do Minnesotans really want their leaders to refuse?

Mr. Homan's deportation priority is "criminal aliens, public-safety threats, and national-security threats," he said. "We've got a lot of them to keep us busy." What the feds say they need, however, is better coordination from Minnesota officials, so that Immigration and Customs Enforcement can pick up illegal migrants who are already under arrest.

"More agents in the jail," Mr. Homan said, "means less agents in the street." That's safer for both ICE and Minneapolis residents, and it also means fewer "collateral arrests."

It's a reasonable request, and the border czar credited the state prison system for honoring ICE detainees, as Gov. Tim Walz wrote Tuesday in these pages that Minnesota does. Yet the local jail in Minneapolis is run by the Hennepin County Sheriff's Office.

"We do not assist with or comply with any civil immigration requests from ICE," it says. "In our jail, we do not honor administrative detainees or administrative warrants."

Sheriff Dawanna Witt won the job in a 2022 nonpartisan election, though she had the Democratic endorsement. "Those detainees don't give us any information," she told WCCO last week, calling them "very generic" and "not signed by a judge." If ICE is targeting criminals, it should get a warrant, she said.

That isn't a spirit of cooperation. The sheriff wrote this week that she met Mr. Homan for a "constructive conversation." She didn't mention any policy change. But if Mr. Walz thinks state prisons should honor ICE detainees, why not the county jail?

Or consider that Minneapolis, under its sanctuary ordinance, broadly bans police from aiding ICE. As the city explained in a public update last month, its officers can't even share information "for the purpose of locating a person

solely for immigration enforcement." They also can't "escort federal immigration agents to enforcement locations," absent some "clear and immediate threat."

'Just give us your criminals,' Trump says he told Walz and Frey.

held accountable based on the crimes they commit," Mr. Frey wrote this week, "not based on where they are from."

Really? If a guy who jumped the border last month commits assault in Minneapolis, it's hard to imagine refusing to deport him is a majority view, even in the Twin Cities.

Most Americans welcome immigrants, but they don't want criminals in their neighborhoods, and Mr. Homan was smart to return to this high ground. Detaining other illegal migrants is "never off the table," the border czar said, because the U.S. can't send a message that it's no big deal to swim the Rio Grande or evade a deportation order.

But he also seemed to acknowledge that ICE's sweep through Minneapolis was overbroad: "Targeted enforcement operations is the way we've always done it. I think we got away from it a little bit." This is what serious talk sounds like.

Ignore the posturing on the left and right, and it isn't hard to imagine a *modus vivendi* the public could support, in Minnesota and beyond. ICE goes after criminals that threaten public safety. State and local officials help where they can, but especially when deportation targets end up in custody for other offenses, such as drunken driving or domestic abuse.

* * *

As Mr. Trump grapples with the unpopularity of "mass deportation," he could also tell his Administration to forget about arrest quotas and return to his promise to target the worst of the worst. Maybe he's leaning that way. On a radio show Tuesday, Mr. Trump recounted his phone calls with Messrs. Walz and Frey: "I said, 'just give us your criminals, and if you give us your criminals, it all goes away.'"

Why wouldn't Minnesota Democrats take that deal? Unless, that is, they'd rather exploit the tragedies in their cities for political gain.

Lenders and the First Brands Charges

When auto-parts supplier First Brands Group filed for bankruptcy last fall, creditors cried fraud. The Justice Department is now offering evidence with charges unsealed Thursday against First Brands founder Patrick James. But the facts also suggest creditors didn't check their blind spots before lending.

First Brands is one of the world's biggest auto suppliers, which is one reason its high-speed crash has shaken markets. What went wrong? The indictment says Mr. James and his brother, Edward James, used fraudulent borrowing schemes to finance acquisitions and operations. Patrick James denied the charges, and Edward said they're without evidence.

The auto supplier relied on what's known as factor-financing, which is common in manufacturing. Businesses sell customer invoices at a discount to third-party finance companies, aka "factors," in return for cash advances. They later repay these factors when they are paid by customers.

Mr. James allegedly submitted fake and fraudulently inflated customer invoices to factors. For example, First Brands allegedly sold one customer invoice for \$8,976 in parts to a third party, claiming it was worth double that amount. A few days later, the company sold the same invoice and claimed it was worth \$463,735. The indictment says creditors now hold \$2.7

billion of fake receivables. It also claims Mr. James established off-balance sheet vehicles to borrow more money and pledged the same inventory as collateral to multiple creditors. In effect, Mr. James allegedly borrowed from Peter to pay Paul without telling either.

When creditors requested customer invoices, First Brands fabricated documents to show "aggregate amounts," the feds say. One question is why creditors didn't demand physical invoices documenting the company's transactions—or a comprehensive audit of cash flows that might have revealed its off-balance sheet borrowing.

Could the hefty interest that creditors were earning—upward of 30% for some—have caused them to overlook red flags? Rich returns invariably come with high risk. If First Brands was willing to pay such high rates to borrow, creditors might have asked why.

Patrick James's representative said this week that First Brands' creditors are "not victims at all, but rather self-interested, sophisticated institutions that reaped hundreds of millions of dollars from First Brands through their patently absurd interest rates and fees."

The fact that creditors should have done more due diligence doesn't excuse fraud. But when monetary conditions are easy, as they were for years, lending caution too often gets thrown to the wind.

The feds indict the CEO, but the facts also aren't flattering to creditors.

Hamas Loses Its Last Hostage

The retrieval of the last Israeli hostage body in Gaza on Monday has seeded a new narrative that Hamas has met its obligations. "Hamas Hands Over Body of Ran Gvili," read the New York Times headline—before it was changed to reflect that Hamas did no such thing. Israeli forces had to find and extract his corpse.

There's a lesson in that for Gaza's future, but this is also a moment to look backward. The return of all 251 hostages taken by Hamas was long thought impossible, including by the Israeli defense establishment, whose consensus was that Hamas would always keep some in reserve. When Prime Minister Benjamin Netanyahu insisted on retrieving them all as an up-front condition of a cease-fire, it was treated as proof he must not want any deal.

But under President Trump's political pressure and Israel's military pressure in Gaza City, Hamas traded all remaining live hostages in the October peace deal's first days. Hamas stalled with the dead, but Israel used trapped terrorists as leverage to extract most of them before long. Its recovery of this last body followed a mission into Gaza City to capture the key terrorist operative responsible for hiding it.

If Hamas had its way, Gvili would still be buried in Gaza, 844 days on. And if Hamas gets its way, its 60,000 AK-47s will remain in Gaza too. Would the disarmament plan produced by

Trump envoy Jared Kushner allow for that?

The plan envisioned Hamas's heavy weapons decommissioned first, and it would condition reconstruction and Israeli withdrawal on Hamas's full disarmament, which is the only path to peace. But the plan also proposes that the "personal arms" on which Hamas's power depends could be transferred to a new police force staffed by Gazans. Hamas is already looking to exploit this as a back-door way to keep its rifles.

The Trump peace plan calls for the "demilitarization of Gaza" and mentions programs to decommission or buy back arms. As Mr. Kushner fills in the details—no easy task—the question is whether demilitarization means no weapons, as it sounds, or merely the transfer of some weapons from one Palestinian group to another.

Whatever arms can be removed from Gaza will help, whether "the easy way" or "the hard way," as Mr. Trump likes to say. But Mr. Netanyahu is unlikely to compromise on the end result. Israel will hold elections this year, and its Prime Minister can hardly face voters with Hamas armed and ruling half of Gaza.

This means Hamas is on the clock now that all the hostages are out, with little time to stall. That isn't the worst prospect for whatever U.S.-negotiated disarmament process emerges. The threat of Israeli military action remains Mr. Kushner's best leverage.

LETTERS TO THE EDITOR

Smith, a 'Rabid Wolf' for a Special Counsel

The editorial board's conclusion that Jack Smith was the "wrong man for the job" of special counsel is right ("Jack Smith Regrets Nothing," Jan. 23), but it's also too forgiving. As the board notes, Mr. Smith's bias was obvious and his overly aggressive prosecution against President Trump was deeply troubling.

It was more than that, however. Mr. Smith's career has been marked by unusual zeal to push novel theories stretching criminal law beyond reasonable bounds. As the Supreme Court observed when unanimously reversing Mr. Smith's conviction of former Virginia Gov. Bob McDonnell, "The Government argues that nearly any activity by a public official qualifies" as an official act that could justify bribery prosecution. It noted that Mr. Smith's "expansive interpretation of 'official act' would raise significant constitutional concerns" by chilling free speech and association. The same concerns loomed large in Mr. Smith's Jan. 6 prosecution of Mr. Trump, which relied heavily upon Mr. Trump's social media posts and speech that day. But because the court ruled that Mr. Trump had im-

munity (which Mr. Smith utterly disregarded), these free speech issues were never litigated.

Mr. Smith also authorized and oversaw prosecution of former Democratic presidential candidate John Edwards for violating federal campaign law based on a novel theory that when private individuals paid money to Edwards's paramour (to conceal their affair), it was a campaign "contribution" to Edwards. A jury acquitted Edwards on one charge and deadlocked on the others, causing a mistrial. Mr. Smith's broad theory was later used by New York Attorney General Letitia James as a predicate for convicting Mr. Trump of falsifying business records in his "hush money" trial.

Mr. Smith wasn't just a "bulldog" he was a rabid wolf hell-bent on winning at any cost. The Justice Department should investigate whether Mr. Smith and his team's actions constituted a conspiracy against the rights of President Trump or others affected by their overzealous prosecutions.

ELIZABETH PRICE FOLEY
Professor, Florida International
University College of Law
Miami

Retirement: God, Mentoring and Peer Review

As founder of the Neighborhood Entrepreneurship Lab (NEL) in Chicago, I heartily agree with Jennifer Breheny Wallace's essay, "The Retirement Crisis No One Warns You About: Mattering" (Review, Jan. 17). Making a contribution is vital to the healthy aging process. NEL helps fledgling entrepreneurs in underinvested neighborhoods by providing them with mentors, many retired from their previous careers. Beyond being a catalyst for small-business growth, this program has been a godsend for many mentors whose talents and expertise enter a new realm of importance.

Beyond NEL's objective of helping to rebuild distressed communities through entrepreneurship, we believe that many mentors are "reborn" by their involvement. Assistance includes coaching, networking and grants. NEL works with selected entrepreneurs for three months, during which time they work on specific aspects of their businesses. Since its founding in 2017, NEL has helped nearly 152 entrepreneurs, 95% of whom are still in business. They have created 760 new jobs in areas where they are badly needed. As for mentors, the majority re-enlist in the program year after year. What isn't strictly measurable but is undeniable is the effect that NEL has had on

mentors, especially those in so-called retirement, as their knowledge and efforts continue to make a difference.

ROBERT W. CRAWFORD JR.
Lake Forest, Ill.

For academicians looking for meaningful ways to contribute after retiring, becoming a peer reviewer for journals in one's field can be an exceptionally worthwhile activity. The proliferation of scientific journals has created an almost insatiable need, and professors on the treadmill of grants, research and publishing are hard pressed to fit in such volunteering. Peer reviewing is a chance to mentor young researchers, provide historical depth, maintain quality standards, and stay current and stimulated in one's field.

JONATHAN M. BORKUM, Ph.D.
Orono, Maine

Your recent article about retirement is full of good ideas, but it left out the most important activity: building your spiritual life. Do you want to feel loved and relevant and peaceful? The first place you should go is to God. If you put God first, everything else will line up as it should.

STEPHEN J. MARTIN
Indianapolis

Emanuel and Youngkin Are Rays of Sunshine

Rahm Emanuel's op-ed, "The 'Mississippi Marathon' Is Teaching Kids to Read" (Jan. 22), and Barton Swaim's Weekend Interview with former Virginia Gov. Glenn Youngkin, "A Sunny Politician in a Stormy Age" (Jan. 24), reinforced to me that if we are going to return to the level of serious, qualified leadership in Washington that the American people deserve, we need to have better choices like Messrs. Emanuel and Youngkin on both tickets. Sadly, many believe that hasn't been the case for at least the last three presidential elections. We've lost confidence in either party's will to deliver on that inherent mandate.

'Local Parish': Get Serious

Regarding Stephen Aduabato's Houses of Worship "The Diversity of a Local Parish" (Jan. 23): I was certainly baptized and questionably educated in my local Catholic parish. I have chosen a different, so-called "destination" parish, filled with other young families, now that I have a family of my own. If the local parish wants a return of young families, then they need orthodox youth from the pulpit and reverence in the liturgy. The faith is a serious business with eternal stakes. Some of our gray-parish parishes need to start acting like it.

ZACK W. ROYLE
Kansas City, Mo.

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Give an Industry a Handout, People Will Try to Catch It

I enjoyed Cole Murphy's Cross Country about the Georgia film tax incentive ("Georgia's Film Tax Incentive Bombs at the Box Office" Jan. 24). I had first hand knowledge of the excessive costs for labor in several Savannah, Ga., area film productions during 2022. I was merely a "background actor" along with hundreds of others, driven to the many set locations in the Savannah area by (spoiler alert) highly paid unionized Teamster workers.

When money is poured into an industry from a government handout, there will always be people ready with buckets to catch it.

JEFF TURNBULL
Hilton Head Island, S.C.

Pepper ...
And Salt

THE WALL STREET JOURNAL



Kates & Scott
"Oh, did I mention I turned your study into an Airbnb?"