Lost and found

The NDA's success in Bengal and Assam is partly offset by its failure in Tamil Nadu and Kerala

The results of the 2026 Assembly elections in Assam, West Bengal, Tamil Nadu, Kerala and Puducherry highlight several factors that have a bearing on India's direction as a secular, democratic, federal republic. In Assam and Puducherry, the BJP and its partners retained power, while in the other three States, incumbents were swept away in a strong current of changed popular opinion. In Assam, for the first time, the BJP crossed the halfway mark of 64 seats on its own and, with its partners, won 101 seats in the 126-member Assembly. For the Congress, this is its worst performance – even lower than its 1985 tally in the aftermath of the Assam Agitation. The regional outfits that were part of the Congress-led alliance, including the Raijor Dal and Assam Jatiya Parishad, were routed, while those within the National Democratic Alliance (NDA) – chiefly the Asom Gana Parishad and the Bodoland People's Front – managed to win a few seats, though they now have little clout given the BJP's outright majority. Chief Minister Himanta Biswa Sarma has reinforced his position in the State through a mix of polarising communal rhetoric and redistribution schemes. Congress leader Gaurav Gogoi lost his own seat.

In West Bengal, the BJP has achieved a decisive victory through long-term planning, aided by the State's political history, a tainted election process, and the exhaustion of the Trinamool Congress (TMC)'s politics that had run its course. Bengal has been home to India's national movement and to Hindutva ideas long before they spread elsewhere, and has carried a strong sense of regional identity. The BJP, through years of meticulous organisation, converted a threshold population of the State to its totalising nationalist narrative. Having subsumed the regional politics of Maharashtra, Assam and Odisha, it had set its sights on West Bengal with obsessive determination, and has won. The TMC faces existential danger, with its founder-leader Mamata Banerjee at 71 and its cadre and voters now susceptible to pressure from the BJP. This election was also the most tainted in India's elections: around 27 lakh people were arbitrarily removed from the electoral rolls, and the Supreme Court of India took an unhelpful view of that grave assault on the fundamentals of democracy. If that is the sign of things to come, it is cause for serious concern.

In Tamil Nadu, the political start-up, the TVK, led by actor C. Joseph Vijay has made a stunning debut. Mr. Vijay is set to become the first Chief Minister not from either of the two principal Dravidian parties since the DMK first captured power in the State – a historic rupture in Tamil politics. While his popularity is now established, his acumen in navigating the complexities of governance and managing the relationship with the BJP and the Centre will be tested from day one. Though the differences in vote share among the formations – the DMK-led alliance, the AIADMK-led alliance, and TVK contesting alone – were not large, a three-cornered contest and the first past the post mechanism delivered an outsized advantage to the TVK. The DMK's votes were more evenly spread across the State, while the TVK and AIADMK had theirs concentrated in pockets of influence, yielding far better vote-to-seat conversion. Mr. Vijay had the advantage of novelty, and the electorate proved open to a new experiment.

In Kerala, the Congress-led UDF's overwhelming victory is as notable as the pitiable performance of the CPI(M)-led LDF. The LDF's defeat belongs principally to outgoing Chief Minister Pinarayi Vijayan, who – uncharacteristically for the State and more so for the Left – had built a personality cult. The BJP has won a historic high of three seats, but the UDF's return, while restoring Kerala's traditional alternation in power, could act as a speedbreaker to the BJP's ambitions. The Congress faces the immediate task of amicably settling the question of Chief Minister from among three potential candidates – K.C. Venugopal, V.D. Satheesan and Ramesh Chennithala. The election results strengthen Home Minister Amit Shah's hand within the BJP's internal dynamics, as the party has grown into a behemoth harbouring multiple interest groups and ambitious leaders. Mr. Shah was the key strategist in West Bengal, and Mr. Sarma in Assam is firmly aligned with him. A reconstitution of all party organisations and a possible reshuffle of the Union Council of Ministers will likely reflect his preeminence in the days ahead. The BJP, by its capacity and willingness to expand its footprint across regions and social groups – oftentimes bending norms – is placing immense pressure on India's federal democracy. The DMK and the TMC have been bulwarks of Opposition politics within and outside Parliament, as demonstrated in the recent parliamentary vote on the Delimitation Bill. With both beaten at the hustings, and buoyed by its victories in Assam and West Bengal, the BJP will feel tempted and emboldened to continue its course of unilateralism. It would be in the interest of the country and of democracy for the BJP to be accommodative and sensitive towards diverse aspirations; while platforms of regional political mobilisation such as the TMC and the DMK will have to adapt to new challenges. The regional parties in Assam and Kerala too faced a setback, suggesting popular fatigue and an inclination towards larger frames of reference mediated by social media. As for the Congress, these results represent victory in Kerala, defeat in Assam, and a lost opportunity in Tamil Nadu. The defeat of the DMK and TMC sets the stage for a potential realignment of the Opposition, opening the possibility for the Congress to aggregate and galvanise social and other interest groups – and to position itself as a weightier axis of anti-BJP politics.

A round of elections that signals structural dominance

Asim Ali

Political researcher and columnist based in Delhi

The phase of Indian politics since 2014 has been widely termed the fourth party system, with the Bharatiya Janata Party (BJP) constituting a dominant pole that increasingly structures the field of competition at both the national and State levels. Some observers have periodically asked whether this BJP-dominant system represents a durable structural dominance or a more fleeting electoral dominance, largely built on and sustained by the charismatic leadership of Narendra Modi.

What drives the juggernaut

These rounds of State elections (in Assam, West Bengal, Kerala, Tamil Nadu and Puducherry) should settle that question in favour of structural dominance. The setback received by the National Democratic Alliance in the 2024 general election suggested that Mr. Modi's charismatic appeal had begun to recede from the dizzying heights it had scaled over the previous decade. Yet, the BJP has performed much better in the phase of elections between 2024-26 then it did either in 2014-16, when Mr. Modi still carried the transformative aura of the *vikas purush*, or in 2019-21, when he became the pro-poor messiah embodying an unmatched reservoir of popular trust. It is only in the present cycle that the BJP has managed to storm to power in Odisha, Delhi, and West Bengal, which is the biggest prize of them all.

Of course, Mr. Modi's leadership remains important in terms of his ability to direct and manage the machinery of the system of power. But it is the sprawling machinery itself, involving the close nexus of party organisation, wider Sangh networks, big industrial houses, and key state institutions, which drives the juggernaut of the BJP-dominant system.

In Haryana and Maharashtra, the mobilisation of the Rashtriya Swayamsevak Sangh helped the BJP blunt the spectre of anti-incumbency (especially among Dalits) that was stalking the ruling alliance after a decade in power. Similarly, in West Bengal, the Sangh Parivar laid the groundwork for the BJP campaign to mobilise scattered caste and community grievances (such as of Matuas and Rajbanshis) into a coherent, State-wide narrative of Hindu exclusion.

In addition, the BJP has, in the course of this period, also built up an architecture of power that has made it the 'natural party of governance' (in the mould of the Congress period of dominance). The instruments of this power include the above-mentioned informal alliances and control over public institutions, through which the BJP is able to structure the party system to its advantage, breaking factions of opponent parties and co-opting its leaders. But it also involves manipulating the administrative machinery to deepen the ideological hold of Hindutva.

> The Assembly election results strengthen the argument for the BJP's structural political dominance

In Assam and West Bengal

In Assam, the Himanta Biswa Sarma government has made the category of the "Bangladeshi Muslim immigrant" (read: Bengali speaking Muslim) the master signifier coursing through everyday functioning of bureaucratic institutions and the public regulation of land and resources. The category of the 'Bangladeshi immigrant' has been embedded at the core of the policies and practices of the National Register of Citizens (NRC), the 'D-voter' category (Doubtful Voter), detention centres, delimitation, eviction drives, policing, and surveillance. The interpellative capacity of the government procedures has turned the distinction between indigenous (Hindu) and outsider (Muslim) into the organising idea for Assamese society in terms of imagining collective life and approaching the political world. The communalism of the Himanta Biswa government thus goes much beyond the regular hate speeches; it is indeed baked into the very architecture of governance and how people relate to it.

In West Bengal, the BJP campaign was characterised by the underhanded tactics and partisan use of state institutions such as the Enforcement Directorate, the Central Bureau of Investigation and paramilitary forces, which were heavily deployed in an unprecedented manner in a State election (outside of Kashmir and the Northeast). Meanwhile, the shambolic and discriminatory rollout of the Special Intensive Revision of electoral rolls by the Election Commission of India ensured that a substantial chunk of the Trinamool Congress (TMC) support base (primarily Muslims) were struck off from the electoral list.

To withstand the juggernaut of the BJP-dominant system requires a politics of counter-hegemony. The Congress in Assam has failed to imagine such a politics over the last decade, let alone execute it. Instead, it turned to the scion of the Gogoi dynasty, who was dispatched from Delhi and given charge of the State a year before the election. The party relied on a dominant caste (Ahom)-led consolidation in upper Assam and Muslim-led consolidation in lower Assam. Meanwhile, the TMC banked on its narrative of Bengali pride, along with cash transfers to women and Muslim consolidation, to secure a fourth consecutive term. Both these strategies failed spectacularly.

The declining fortunes of both the established regional parties as well as the Congress can be traced back to the form of their organisation, which is the electoral-professional party. As theorised by political scientist Angelo Panebianco, this is a party organised around the professional apparatus of campaign managers, consultants and pollsters (as opposed to ideologically motivated cadres), whose primary focus revolves around electoral competition.

The rise of the electoral-professional party is an institutional adaptation to the prevailing developmental paradigm. For State governments to attract big capital and deliver on economic growth (and amass the funds for social welfare), they are constrained to follow a similar bouquet of 'good governance' policies: pro business reforms and big infrastructure projects. This led first to the shift of the prevailing party form from the (ideological/identity-based) mass party to the (centrist) catchall party. The rise of technology-enabled direct cash transfers seeded the next transmutation from the catchall party to the electoral-professional party. The parallel professional framework becomes indispensable to connect these "techno-patrimonial" leaders (Yamini Aiyar) with their broad welfare constituency.

The southern States

As Neelanjan Sircar has noted from his fieldwork in Bengal, TMC cadres have been repurposed from overseeing delivery of benefits (outsourced to professionals) to the mobilising of voters for elections. In Tamil Nadu, even the Dravida Munnetra Kazhagam has been transformed by M.K. Stalin's 'CEO' style leadership, from a decentralised organisation of strong district secretaries into a centralised, disciplined and welfare-driven machine. A similar story could be told in Kerala of Pinarayi Vijayan's transformation of the Communist Party of India (Marxist), or CPI(M), as a disciplined party under his personalistic management.

While M.K. Stalin, Pinarayi Vijayan and Mamata Banerjee achieved some success after turning their parties from cadre-based to electoral-professional outfits, it masked the electoral fragility of such politics. The downside of a managerial, ideologically feeble politics is that it depoliticises the electorate, and makes them turn to either the populist outsider solution (as in C. Joseph Vijay's Tamilaga Vettri Kazhagam in Tamil Nadu) or the Hindu nationalist solution (as in the BJP in Assam).

While Kerala has gone for the conventional alternative in the Congress, it is not yet clear whether the deformed CPI(M), now in opposition, would be able to protect its space from the rising BJP any better than it has managed in Tripura and West Bengal.

Capitalising on changing Tamil voter mood

V. Geetha

Feminist historian, translator and publisher

C. Joseph Vijay's Tamilaga Vettri Kazhagam (TVK) has established its popularity and stands to emerge as the single largest party in the 2026 Tamil Nadu State Assembly elections. Clearly, voters decided to give up on the two Dravidian parties, the Dravida Munnetra Kazhagam (DMK) and the All India Anna Dravida Munnetra Kazhagam (AIADMK), and chose to go with this newcomer. His bravado in not seeking an alliance with other parties and going it alone has won the day. Equally, Mr. Vijay was ready to be 'Tamil' in his own way, but he also spoke and did politics in a manner that would appeal to untutored and ingénue voters – evident in his road shows, and his one-liners. Spectacle and banality have prevailed against old-style political tendentiousness and rhetoric.

Persona as capital

The lead-up to the elections was predictable. The campaigns had to deal with issues that have been the staple of political exchange in the State since the DMK came to power in 2021: the Dravidian model of growth and social justice versus the Hindutva model of authoritarian unity and erosion of rights; corruption and misgovernance of an incumbent party versus rosy promises of honest, accountable and equally welfarist governance, presided over by the AIADMK, under the aegis of the Bharatiya Janata Party (BJP).

Mr. Vijay promised a 'third' path, without quite telling his voters what that means – except that he stuck to the time-tested welfarist and anti-Hindutva idiom. His poll managers ensured that he did not say anything contentious, and proclaimed his persona as his capital – in this neo-liberal era of self-creation and self-help, it helps to have a personality that is as much a hologram as a person. Which is also why nothing sticks to him – whether it is outrage over the more than 40 deaths in Karur (September 2025) or criticism of his cynical use of children to garner votes. For a generation growing up with precarity and uncertainty, while being drawn into the promises and perfidies of the gig economy, the Dravidian model cannot be expected to mean much. For older voters, Tamil Nadu's economic growth holds no surprises, and for those who have not been part of this growth process, such as rural Dalits and other working-class people, especially women, there is nothing to be celebrated. Cash transfers and subsidies do not address the deep indebtedness that many women are trapped in. As for corruption, it is viewed as a given, and nobody baulks at its ubiquity, and there has been no concerted attempt to challenge it. The fear of the BJP and its disregard for rights cannot mean much to voters in a State that has returned the authoritarian J. Jayalalithaa to power several times.

> The leader of the Tamilaga Vettri Kazhagam now occupies a space hollowed out by a politics whose rhetorical power has lost its resonance

On reservation and social justice

Social justice, especially the reservation policy, is not an existential issue in that it is yet another detail to be attended to, while filling forms. Or it becomes a matter of contention, when used to discredit reservation for Dalits. In short, reservation is neither valued, nor understood, and Dravidian parties have been lax in meaningful political communication on the subject. For older voters, reservation, or for that matter, social justice, holds no special interest – after all, it is a default setting. It has been important only when it helped to build dominant caste constituencies. As Tamil scholar Stalin Rajangam pointed out nearly 15 years ago, reservation has been a focal point for numerically powerful backward castes to mobilise their caste brethren into a political force, which is then used to torment Dalits who are assertive, and on that basis, to proclaim a caste's claim to power within the larger body politic.

Claims to social justice cannot but appear ironic, to Dalits, in this context. The two Dravidian parties have been indifferent to the persistence of brutal violence against them – especially the spate of killings of young Dalit men who dared to love caste Hindu women. For all their veneration of Periyar, the DMK's leaders have not sustained a public dialogue or educational outreach on intercaste love and marriage.

Meanwhile, Hindutva's machinations have helped shore up dominant caste identities in the State, and in some contexts served the interests of subaltern caste persons who are disgruntled with the political truisms of the Dravidian parties. It is not so much the BJP's known antipathy to Muslims and Christians that marks its existence here – though that is not absent; rather, the party is viewed as 'their' own by segments of caste Hindus.

The DMK's model of rule too has contributed to the party being edged out. For some time now, the government has relied on policymaking, undertaken by able bureaucrats, with the support of non-governmental organisations, or private research institutes, rather than heed voices from the ground. It is ironic that sanitary workers complaining about unfair wages are ignored until it is impossible to do so, even as local bodies commission studies on municipal waste.

The other parties

The real and tragic losers in this election are the Viduthalai Chiruthaigal Katchi and the Left parties. The AIADMK is not burdened by ideology and has been let down by an uneven caste arithmetic. But the Left and Dalit parties have stayed within an uneasy alliance, and not benefited from it – in spite of individual victors, their vision of social change has been forced into a framework that is not theirs, and they would now need to retrieve it.

Mr. Vijay has thus gained from the sins of omission and commission of extant parties. And it is to his advantage that his young followers are not part of that slow world of thought and dialogue which continues to attract young persons, inspired by Periyar, Ambedkar and Marx. Rather, the adoring crowds that have voted Mr. Vijay to power move to a different rhythm. Thanks to social media, they respond to the instant rather than anything else. The proliferation of images and words on our screens has collapsed the gap between intent and action. And Mr. Vijay occupies this collapsed space – his presence is already action.

LETTERS TO THE EDITOR

The much awaited results

The election results have been astounding. Tamil Nadu has delivered a stunning verdict, defying most exit poll predictions. Actor-politician C. Joseph Vijay, has led his newly formed party, the Tamilaga Vettri Kazhagam, to a remarkable victory, marking a significant shift in the State's political landscape. This electoral outcome reflects the electorate's desire for change, where there is a willingness to embrace new leadership. While the mandate is decisive, it also brings high expectations. With the elections behind him, expectations now shift to Mr. Vijay's ability to turn campaign promises into tangible results.

Y.R.M. Rao,
Chennai

For decades, West Bengal has stood as a stark reminder of how political violence can become institutionalised. From the long years of the Communist Party of India (Marxist) to the rule of the All India Trinamool Congress, governance often operated under a shadow of intimidation, cadre dominance, and systemic coercion. What has unfolded was not merely an electoral loss; it was public repudiation of a political culture that many Bengalis had grown weary of.
The people are expecting a transformation in governance — one that ensures safety, dismantles entrenched corruption and restores faith in public institutions.

Arvind Dinkar Tapkire,
Mumbai

There is no denying that the BJP's victory was facilitated by the 'SIR effect' which disenfranchised lakhs of their constitutional right. When such a significant section of the electorate is silenced, the foundation of the mandate is hit.

Adrian David,
Chennai

The results of the five elections show that once free and fair conditions are created for voting, voters are incentivised to express their opinion fearlessly. One must congratulate the Election Commission of India for conducting the polls well notwithstanding the SIR controversies.

Rajib Sarma,
Guwahati, Assam

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

Governance is the ultimate currency in Kerala

The LDF's unprecedented decade long-run has come to an end with the UDF winning the mandate by offering change and speaking to concrete grievances

K. M. Seethi

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Kerala has long kept its own counsel at the ballot box. In the Assembly elections of 2026, the electorate of this politically alert State delivered what many observers had anticipated – a decisive verdict, where the United Democratic Front (UDF), led by the Indian National Congress, is returning to power with a thumping majority, ending the Left Democratic Front's (LDF) unprecedented decade-long run in office. Equally notable is the Bharatiya Janata Party (BJP)-led National Democratic Alliance's (NDA) entry, with two former Union Ministers crossing the threshold into the Kerala Assembly. The results show a UDF majority with an estimated 102 seats (out of 140), against the LDF's 35 and the NDA's 3.

The pattern across the recent electoral cycles tells its own story. The 2024 Lok Sabha result, in which the UDF swept 18 of the 20 parliamentary seats, was the first clear signal. The 2025 local body elections confirmed the trend. And now, in 2026, the pendulum has completed its arc.

The LDF lost its base due to the retrospective voting penalty, wherein voters act as rational auditors, rewarding or punishing incumbents based on promised versus delivered outcomes. In 2016 and 2021, performance against explicit benchmarks (crisis response, welfare delivery, administrative credibility) earned positive scores, producing a historically unprecedented back-to-back majority. But success raises benchmarks. By 2026, voters were no longer comparing LDF to its predecessor; they were comparing it to itself, and to an aspirational future it had not fully delivered. The slogan "We have governed well; trust us again" was ill-suited to counter this dynamic.

Clean sweep: Congress leaders Shashi Tharoor, Ramesh Chennithala, K. C. Venugopal, and V. D. Satheesan celebrate in Thiruvananthapuram. NIRMAL HARINDRAN

Communal consolidation?

However, no issue generated more heat than the voting behaviour of religious minorities. By 2026, poll surveys suggested that the UDF garnered over 70% of Christian support, compared to roughly 25% for the LDF, a dramatic reversal from the LDF's approximately 45% share among Christian voters in 2016. The swing was most pronounced in Kottayam, Idukki, Pathanamthitta, and Ernakulam. The LDF government's 2025 push to reform the education sector was perceived by Christian denominations as a challenge to the educational autonomy of minorities.

Among Muslim voters (approximately 26% of the electorate) the LDF lost heavily, with losses concentrated in Malappuram, Kozhikode, and Ernakulam. The provocative public statements of some leaders on Muslim issues, combined with senior CPI(M) (Communist Party of India (Marxist)) leaders' consistent failure to publicly rebuke them, were read as implicit endorsement of such statements. The UDF hammered this connection relentlessly.

Additionally, the Sabarimala gold theft issue, along with high-profile cases implicating CPI(M)-linked individuals, delivered a credible narrative of institutional rot that the UDF deployed with surgical precision in Hindu-majority constituencies.

The NDA's role is best understood through the polarisation trap – a process in which a third party draws enough votes to alter seat outcomes without winning decisively. The NDA's vote share, rising from approximately 12% in 2016 to approximately 19% in the 2024 Lok Sabha elections, transformed two-way fights into triangular contests in constituencies such as Nemom, Chathannoor, Kazhakootam and Palakkad. The UDF alleged that the LDF engaged in 'adjustment politics' by fielding weak candidates to help the BJP indirectly. However, the verdict did not validate a systematic collusion pattern; the BJP's consolidation appeared organic.

The economic undercurrent

The LDF governed a decade without a corruption conviction, yet perception proved as damaging as fact. Fiscal stress, 25%+ youth unemployment, stalled infrastructure, and the abandoned SilverLine project gave the UDF's allegations tangible grounding among urban and middle-class voters. Moreover, the war in West Asia created deep anxiety across Kerala's Gulf-dependent families as there were many job losses and forced returns. Kerala's new middle class voted prospectively and the UDF's aspirational messaging went over well. Its manifesto spoke directly to issues that had drifted from the LDF, which included employment generation, Gulf returnee rehabilitation, rubber price stabilisation etc.

Kerala's 2026 election verdict is a democratic correction with specific reminders. The LDF collapsed under unmet benchmarks and institutional controversies while the UDF won by offering change, and speaking to concrete grievances. The new middle class and Gulf-dependent families are forces that no party can manage through welfare alone.

Kerala's electorate – diverse in faith and alert to the uses and abuses of identity – has once again demonstrated that governance is the ultimate currency of its politics. Communities shifted, coalitions realigned, and incumbents fell, but the democratic credo held firm. In a national setting increasingly shadowed by polarisation, Kerala's verdict is a clear reminder: its democratic dividends continue to act as a bulwark against the coarser impulses of electoral mobilisation.

The significant erasure of democracy in Bengal

The Trinamool government, through its anti-democratic practices and failure to focus on economic development, has lost its connect with the people

Subhanil Chowdhury

Professor of Economics at Presidency University, Kolkata

The results of the 2026 Assembly elections in West Bengal marks a tectonic shift in the political landscape of the State. As of writing this article, the Bharatiya Janata Party (BJP), for the first time in history, has emerged as a clear winner with more than 200 seats and a vote share of 45.6%, up from around 38% in 2021. The Trinamool Congress on the other hand is winning around 80 seats with 40.8% of the vote share, down from 48% in 2021. Most of the Cabinet Ministers of the Trinamool government have also lost. Clearly, there has been a significant anti-incumbency vote against the ruling party.

The Trinamool government had a massive beneficiary network through its multiple schemes targeting women, workers as well as the youth. Moreover, the BJP was portrayed as an 'outsider', incompatible to the ethos of Bengali culture. Also, the question of disenfranchisement through the Special Intensive Revision (SIR) of electoral rolls was also a major electoral talking-point. In spite of all these issues, supposedly favouring the ruling party, the BJP has won a thumping majority in the State. What explains these results?

Trinamool's track-record

The last 15 years of Trinamool rule have been mired with innumerable controversies. A large number of Ministers have been in jail under corruption charges. The cash for jobs scam in the School Service Commission resulted in about 26,000 school teachers losing their jobs. The government, while providing various direct transfer schemes, could not provide a dearness allowance on a par with the Central government to State government employees. Moreover, the Trinamool's record with respect to industrialisation and employment generation has also not been good. All of this resulted in a situation where the younger generation and a significant section of the urban educated middle-class voting against the ruling party. Even in rural areas, despite the massive fund transfer programme of the government, the Trinamool has been unable to retain its base. The extortion rackets run by the ruling party across the State resulted in a situation where ordinary people were robbed of their hard-earned money.

In addition to such economic issues, there are political reasons because of which the Trinamool lost. First, is the significant erosion of democracy in the State.

Historic shift: BJP supporters burn fire crackers to celebrate their party's win in the Assembly elections, outside a counting centre in Kolkata, on May 4. REUTERS

In the 2018 and 2023 panchayat elections, ruling party cadres indulged in massive violence denying voting rights to the rural population. In many cities, the municipal elections have not been held for many years now. Even the elections to various students' unions in the State have been suspended. Since these elections were either not held or were rigged, the Trinamool lost its connect with the people. They could not sense the deep anger which the people had accumulated against the regime.

Additionally, the RG Kar rape and murder case witnessed an outpouring of opposition against the government on the streets of Kolkata and other urban areas. Since then, there has been yet another case where a young woman was raped in a college campus in Kolkata. This not only eroded the Trinamool's woman voter base, it also galvanised the people against the government.

The SIR issue

However, it must be said that the SIR process in West Bengal has resulted in a situation where lakhs of genuine voters have been disenfranchised. If the total vote difference between the two camps is close to the numbers under adjudication, then this will raise serious questions about the electoral outcome. While the Trinamool tried to make it an issue, the anti-minority campaign of the BJP which targeted the so-called infiltrators, consolidated a significant section of the Hindu community in favour of the BJP. If we assume that it is mostly Hindus who vote for the BJP, then around two-thirds of them have voted for the party. Such a huge Hindu consolidation of votes for the BJP is only second to that in Assam. The fact that the BJP, without fielding a single Muslim candidate, won 45% of the votes, where the Muslim population in the State is close to 30%, shows the extent of Hindu consolidation in the State. In addition to the anti-incumbency sentiment, the BJP's ideological consolidation cannot be denied.

It is also a fact that the BJP's rise happened because neither the Congress nor the Left could emerge as a force which could challenge both the larger parties. The Congress is leading in two seats, the Left in 1, the Indian Secular Front also in 1, along with two seats won by the newly formed party by former Trinamool MLA Humayun Kabir. What is interesting to note is that all these seats are from minority-dominated areas. This shows that a section of minorities also voted against the Trinamool where credible non-BJP candidates were in the fray.

In other words, the anti-incumbency sentiment against the government existed even among minorities.

The State is now entering a new political phase. The apparent political consensus of secular politics dipped in Bengali cultural ethos has now been breached by the BJP. The results today will have far-reaching consequences for the State of West Bengal.

Assam's mandate of assertion and polarisation

The BJP's strategy of conflating Hindu and Assamese identities, along with promoting welfare and development schemes, has led to its decisive victory in the State

Kaustubh Deka

Assistant Professor of political science at Dibrugarh University

The Bharatiya Janata Party (BJP)-led National Democratic Alliance (NDA) is set to form the government in Assam for a third consecutive term. In an Assembly of 126 seats, the seat as well as vote share of the incumbent alliance has significantly gone up.

Politics in Assam is marked by great linguistic, religious and ethnic diversity. This has created ample ground for political polarisation in many directions. Historically, the State has undergone various political shifts ranging from Congress dominance till the mid-1970s to the rise of regionalism in the mid-1980s, before returning to Congress dominance in the first decades of the 21st century. The State, once considered a stronghold of the Indian National Congress-led United Progressive Alliance (UPA), has now become a stronghold of the BJP. The present electoral mandate therefore needs to be read as a renewed validation of an already existing political domination, with augmented ideological moorings.

The once formidable 'Congress system' began developing cracks in Assam soon after Tarun Gogoi's return to power in 2011. The party managed to retain power despite a pervasive image of corruption, largely due to its image of creating 'peace and development' as the party initiated negotiations with major rebel groups in Assam. However, an important development in that election was the emergence of the All India United Democratic Front (AIUDF) that emerged as a major political player by winning 18 seats, cutting into 'Muslim votes' seen as a traditional bastion of the Congress.

However, at that point, the alienation of 'Muslim votes' helped the Congress as there was a surge of sympathetic Hindu votes for the party, which otherwise could have gone to the BJP that was already making a slow but steady mark over Assam's politics. This complex negotiation with the AIUDF and the question of 'Muslim votes' would later set up the Congress's 'Muslim dilemma' in Assam for years to come. This needs to be read with the fact that in the current verdict, the Congress has faced near complete eradication in the Hindu majority areas of Assam, as the party has managed to elect just one Hindu candidate, out of its total tally of 20 seats, as per the latest reports. A meticulously crafted digital campaign by the BJP managed to create a powerful narrative labelling the Congress as a "Miya party" (Miya is a pejorative term for Bengali-speaking Muslims), which the opposition was not able to counter.

Saffron wave: BJP party workers celebrate the party's win at the BJP Assam State head office, in Guwahati on May 4. ANI

The other trend with strong implications for the years to come is the declining hold of the Congress in the tea trade unions due to unfulfilled promises such as raised wages, the grant of land *pattas*, and Scheduled Tribe (ST) status to tea tribes. Interestingly, the first two demands have been met by the BJP government in the run-up to the last election.

The waning of regionalist forces in the State was already marked in the previous Assembly elections. It has now become further established; the Congress's alliance with the Assam Jatiya Parishad (AJP) and the Raijor Dal seems to have come too late in the day to have had any significant impact.

The road to victory

The BJP's victory in Assam can be understood through various verticals. One, the BJP's developmental model has worked out in different ways. At a broader level, a section of people feel that the party has delivered in terms of building the necessary infrastructure. At a more minute level, people feel that the various schemes introduced by the ruling incumbent are vital, and that they can't afford to let them go. Voters are now habitual '*hitadhikaris*' (beneficiaries).

Two, the self-projection of the BJP as a protector of Hindus and the conflation of the Hindu and Assamese identity has helped the party consolidate votes. The hardline Hindutva approach riding on religious polarisation has met with demographic dividends given the historical legacy of suspicion and mistrust across sections on linguistic and religious lines.

Third, the exercise of delimitation seems to have helped the alliance bring up the tally from previous numbers, by reducing the effectiveness of 'Muslim votes' constituency-wise. The exercise has not only redrawn the boundaries of the constituencies but also of political fault lines in the State.

And finally, the Centre and State governments working in tandem has been a historic reality for the Northeast, a resource-starved 'peripheral' region. Therefore, rallying the campaign around a 'double-engine sarkar' and invoking the 'Modi-Shah leadership' steered by Himanta Biswa Sarma regionally, have been strategies that have played out well.

The historic fragility of a region with a militarised past, the resonance of which is not yet over, tends to weigh down on one's sense of electoral sensibilities.

Add to this the uncertainties of price rise, the general situation of joblessness, polarisation and a crafty political party with ample resources to stitch together an electoral coalition consisting of sub-groups of voters with divergent socio-economic needs but brought together by a triadic reality – aspirations, insecurity and polarisation.

This verdict needs to be read as a solemn reminder of the importance of having a robust organisational machinery on the ground. At this point, as the sun sets over the Brahmaputra, triumphant rays of saffron sweep over most of Assam. And a long night sets in for those who wanted the Lotus replaced.

Text&Context

THE HINDU

NEWS IN NUMBERS

Percentage drop in Dubai airport passenger traffic

66 in per cent. Dubai airport's passenger traffic plunged by two-thirds in March following Iran's attacks on the UAE during the West Asia war, the emirate's media office said on Monday. Traveller numbers at Dubai International sank to 2.5 million, down 66% year on year. AFP

Persons injured in Oklahoma City shooting on Sunday

12 A shooting on Sunday night at a party at a lake near Oklahoma City sent at least 12 people to hospitals, according to police and hospital officials. Edmond police spokesperson said authorities received reports of shots being fired at about 9 p.m. No arrests had been made yet. AP

Percentage decline in Russia's pipeline gas exports to Europe

1.70 in per cent. Russian energy giant Gazprom's average daily natural gas supplies to Europe via the TurkStream undersea pipeline declined by 1.7% in April from a year earlier to 41 million cubic metres, Reuters preliminary calculations showed on Monday. REUTERS

Decline in India's liquefied petroleum gas consumption

16 in per cent. India's cooking gas LPG consumption fell by a steep 16% in April as supply disruptions linked to the West Asia conflict hit availability for both household kitchens and commercial users, according to latest official data. LPG consumption stood at 2.2 million tonnes in April. PTI

Percentage decline in India's palm oil imports in April

27 in per cent. India's palm oil imports fell 27% to a one-year low in April, as sluggish demand from institutional buyers and a recent price rally that eroded its discount to rival oils prompted refiners to curb purchases, five dealers said. REUTERS

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Did the PM's broadcast violate MCC?

What does Part VII say about using public resources? How does election law treat such appeals? Can public broadcasters be used for campaign messaging? Why has the Election Commission not acted so far?

EXPLAINER

V. Venkatesan

The story so far:
The Model Code of Conduct (MCC), which guides political parties and candidates during elections, was first drafted by the Kerala government in 1960. The Election Commission (EC) formalised it in 1968, revised it in 1974, and added Part VII on the "party in power" in 1979. Former Chief Election Commissioner T.N. Seshan enforced it with unprecedented rigour from 1991. Prime Minister Narendra Modi's April 18 address has raised questions about whether the address violated the Code.

How did the Model Code of Conduct evolve?
The Supreme Court, in *Mohinder Singh Gill v. Chief Election Commissioner* (1978), described Article 324 as "a reservoir of power" that allows the EC to act where Parliament has not legislated. The Punjab and Haryana High Court, in *Harbans Singh Jalal v. Union of India* (1997), held that the Code comes into effect from the announcement of the election schedule. Sanctions range from censure to the suspension of party recognition under paragraph 16A of the Election Symbols Order, 1968.

Mr. Modi's address was carried live on Doordarshan, Sansad TV, and All India Radio. He named four Opposition parties and urged women voters in Tamil Nadu and West Bengal to punish them at the polls on April 23 for defeating the 131st Constitution Amendment Bill in the Lok Sabha.

Does the Prime Minister's broadcast violate the Code?
Clauses 1(a), 1(b), and 4 of Part VII of the MCC prohibit the party in power from

Prime Minister's address was carried live on Doordarshan, Sansad TV, and All India Radio. PTI

combining official visits with electioneering, using government machinery for campaign work, and misusing publicly funded mass media for partisan coverage during the election period. The broadcast raises distinct questions under both the Code and the Representation of the People Act, 1951.

The Code asks what the incumbent did with public resources. It does not provide a closed list of impermissible appeals; that open texture is deliberate. On its face, the April 18 address appears to be a textbook Part VII matter. At the time of writing, the Commission has taken no action on the complaints it has received.

The statute is less flexible than the Code. Section 123(3) of the Representation of the People Act, 1951, as amended in 1961, makes it a corrupt practice for a candidate or his agent to appeal to voters on the ground of "his" religion, race, caste, community, or language. The provision turns on a pronoun, "his", and five enumerated nouns. In *Abhiram Singh v. C.D. Commachen* (2017), a seven-judge Bench of the Supreme Court settled, by a 4:3 majority, that "his" extends to the voter as well as the candidate.

What do the law and the courts say about such appeals?
However, Abhiram Singh grappled with the pronoun, not with the nouns. The 1961 Parliament was legislating against the sectarian appeals of its moment, when religion, race, caste, community, and language were the dominant axes of Indian politics. Section 123(3) was not drafted to police every form of partisan appeal.

The April 18 broadcast ran on different axes: gender as a mobilising category, party affiliation as a target, and the Prime Minister's national broadcast on Doordarshan as the medium. The objection here is not to the identity of the audience, but to the partisan use of publicly funded media. The statute's five nouns were never meant to catch that.

A writ petition pending before the Supreme Court (Diary No. 24600 of 2026), filed by former Congress MP T.N. Prathapan, and a candidate in the just-concluded Assembly elections in Kerala, opens a different statutory route. It invokes Section 123(7), not Section 123(3). Section 123(7) makes it a corrupt practice to obtain or procure the assistance of government servants, including gazetted officers, for the furtherance of a candidate's electoral prospects. The sub-section was drafted to deter candidates from pressuring police and revenue officials into electioneering; the petition asks whether its reach extends to public broadcasters and the PMO.

The petition argues that the use of Doordarshan and Sansad TV, along with Prime Minister's Office personnel, to prepare and disseminate a partisan broadcast falls within this prohibition. Where Section 123(3) focuses on the grounds of an appeal, Section 123(7) turns on who was pressed into service to deliver it.

On that reading, the statute reaches April 18 not through its five nouns but through its workforce clause.

This returns the conversation to the Code. The MCC, unlike the statute, was written to be open-textured. Part VII asks what the party in power did with public resources; the statute asks which of five categories the appeal invoked, or whose assistance it procured. The statute sets a floor on corrupt practice, not a ceiling on what the Code can reach.

The Commission's silence on Mr. Modi's broadcast is not a doctrinal difficulty. It is a choice not to use the one instrument in Indian electoral regulation that was kept open precisely for settings where the statute may reach only belatedly, if at all. If the court admits the petition and the Commission is compelled to answer, the architecture of MCC enforcement may face its hardest test yet.
(V. Venkatesan is a journalist and legal researcher)

THE GIST

- The April 18 broadcast appears to be a textbook Part VII issue, raising questions about the partisan use of State-funded mass media and the use of public resources during the election period, but the Commission has taken no action so far.
- While Section 123(3) does not cover such appeals, the petition invokes Section 123(7) on the assistance of government servants, bringing the issue back to the open-textured MCC, which the Commission has chosen not to use.

What does the latest ruling mean for Forest Rights Act?

Why did the court intervene in the DLC's decision? What does the law say about eviction and grazing rights?

C.R. Bijoy

The story so far:
On April 20, the Lucknow Bench of the Allahabad High Court reminded the District Level Committee (DLC) under the Forest Rights Act 2006 in Lakhimpur, Uttar Pradesh, that any previous court orders inconsistent with a later law are null and void.

Why is the order important?
The High Court struck down the DLC's decision in March 2021, rejecting the forest rights claims of the Tharus of Palia Kalan Tehsil, a tribal community, citing a Supreme Court interim order in 2000 that barred "de-reservation of forests/sanctuaries/national parks" until further orders.

The DLC is headed by the District Collector and includes the Divisional Forest Officer, the District Tribal Welfare Officer, and three district panchayat members.

The core legal principle in lawmaking is that all provisions in earlier laws and court orders that are inconsistent with the provisions of a later law are null and void. The Forest Rights Act (FRA) 2006 itself also states that forest rights are recognised and vested in forest dwellers "notwithstanding anything contained in any other law for the time being in force and subject to the provisions of this Act". The DLC violated this provision, which is a punishable offence.

Has the DLC been punished?
While the order has thus brought relief across the country, the High Court did not invoke the mechanism the FRA provides to sanction offenders. The Gram Sabha is a statutory authority under the FRA. It has to issue 60 days' notice to the State-Level Monitoring Committee to proceed against the authority violating the law.

However, the High Court ignored this provision and instead asked the DLC itself to reconsider its offence and make its decision anew in line with existing law and court orders.

The FRA does not provide for such allowances.

How has the FRA been superseded?
FRA disallows the eviction or removal of forest dwellers "from forest land under their occupation till the recognition and verification procedure is complete". For example, in January 2026, the Uttarakhand High Court ordered the forest department that "till final adjudication of the claims, the respondents shall refrain from initiating any coercive action, including eviction of the petitioners or interference with their peaceful possession and agricultural activities on the lands under their occupation".

However, there has been repeated disregard for and violations of the FRA. For instance, in September 2014, the Madras High Court had dismissed the plea of petitioners from Asaripallam, in Theni district, challenging eviction notices they had been issued and to consider their claims under the FRA. This was based on the forest officer's submission that they were encroachers and weren't eligible for rights under the FRA.

The Madras High Court stated that the claim process under the FRA would only waste the authorities' time and dismissed the case.

The same High Court has dismissed similar petitions under the FRA by petitioners from Perambalur in 2017, Tuticorin in 2020, Sivagangai in 2021, and Theni in 2022. Authorities also continue to issue eviction orders under the Tamil Nadu Forest Act (TNFA) 1882, despite such orders having been overridden by the FRA.

Does the FRA allow grazing?
On March 13 this year, the Madurai Bench of the Madras High Court dismissed a review petition of the March 2022 order, noting that "the provisions prohibiting cattle trespass into forests under Section 57 of the Tamil Nadu Forest Act", to protect wildlife and the spread of disease, were the valid legal basis for the ban.

The High Court had initially banned grazing in all forest areas of Tamil Nadu; later the same month, it restricted the ban order to tiger reserves, national parks, and wildlife sanctuaries. However, it made no reference to the FRA, which recognises grazing rights in all forests, including those overlapping with tiger reserves, national parks, and wildlife sanctuaries. FRA is also a central law and thus overrides a State law with regard to both prohibition and permission for grazing.

This is why the Allahabad High Court reaffirming that provisions in the later law override inconsistent provisions in previous ones, as well as in court orders, comes as a breath of fresh air.
(C.R. Bijoy examines natural resource conflicts and governance issues)

THE GIST

- The High Court reaffirmed that provisions in a later law override inconsistent earlier court orders, striking down the DLC's rejection of the Tharus' forest rights claims.
- The ruling highlights repeated disregard of the Forest Rights Act, including eviction orders and denial of grazing rights, despite the law recognising and protecting these rights.

KEYWORD

GETTY IMAGES

Das Adam Smith Problem: rethinking Smith's moral and economic worlds

The Das Adam Smith Problem shows an apparent dichotomy between sympathy and self-interest in Adam Smith's works, but most scholars now view it as a misunderstanding, arguing that his philosophy forms a coherent whole uniting ethics and economics

Atanu Biswas

Adam Smith's magnum opus, *An Inquiry into the Nature and Causes of the Wealth of Nations,* considered the foundation stone of modern economics, marked its 250th anniversary on March 9. While celebrating the epic work, it is also worth pondering the long-standing conflict between two of Smith's books – *The Wealth of Nations* (1776) and *The Theory of Moral Sentiments* (1759).

A 'problem' or a misreading?

The "problem," known as "Das Adam Smith Problem," was first formulated by German economists of the Historical School, such as Wilhelm Hasbach and August Oncken, in the late 19th century. They perceived a huge contrast between the sympathetic moral philosophy of Smith's first book and the selfishness depicted in the latter. Did Smith's perspective really evolve over those 17 years?

In the 1920s, however, Jacob Viner, a mentor of the early Chicago school of economics, showed that Smith's two books share an identical philosophical base. Furthermore, David D. Raphael and Alec A. Macfie, editors of the 1976 Glasgow Edition of The Theory of Moral Sentiments, categorically rejected the Das Adam Smith Problem, calling it "a pseudo-problem based on ignorance and misunderstanding."

Smith extended his earlier moral philosophy into economics rather than discarding it. The 'invisible hand' was a metaphor for how individual motivations, when properly directed, could benefit society. It was never intended to be a celebration of avarice. Drawing on Rousseau's *Second Discourse*, as discussed in Charles L. Griswold's 2010 paper, "Smith and Rousseau in Dialogue: Sympathy, Pitié, Spectatorship and Narrative," Smith suggested that human beings are not naturally sociable, and that markets are extensions of morality rather than moral voids.

The Das Adam Smith Problem has come to symbolise the dual nature of modernity itself, especially in the wake of industrial capitalism. The majority of contemporary scholars see this as a misunderstanding or a partial grasp of Smith's philosophy and view it as forming a coherent whole that unites ethics and economics. As Amartya Sen wrote in a 2010 paper in the *Erasmus Journal for Philosophy and Economics*, "In economics, for example, Smith was concerned not only with the sufficiency of self-interest at the moment of exchange but also with the wider moral motivations and institutions required to support economic activity in general."

Reconciling morality and markets

On closer inspection, Smith's two perspectives are not only compatible but also complement each other, as they are, in fact, part of a unified system. While the *Wealth of Nations* is more outward-focused, the *Theory of Moral Sentiments* is inward-focused; both, however, view the world and the self through the lens of empathy. The *Wealth of Nations* deals with applied empathy, whereas *Theory of Moral Sentiments* is about empathy per se.

What is the root cause of the Das Adam Smith Problem? As Leonidas Montes argued in a 2003 paper in the *Journal of the History of Economic Thought,* "Scholars have long been interested in the apparent dichotomy between sympathy and self-interest in Smith." This dilemma arises because, by nature, human beings are binary thinkers. The real world, however, exists along a spectrum of grey areas. There is a constant interplay, advancement, regression, etc., of self-interest and empathy. Smith's two books engage with different points along this same spectrum.

In his 2010 work, Amartya Sen argued that "Adam Smith has had much smallness thrust upon him." Smith became the welfare theorist of today because of the innovative interpretations of the welfare economists.

Leon Walras, the famous economist, set the goal for mathematical economics in the 1880s, but it was not until Kenneth Arrow's work in the 1950s that it was realised. To comprehend what markets can accomplish collectively, Arrow developed economic theory beyond tired dichotomies of whether they are good or bad.

A debate that endures

There is no denying that the "Das Adam Smith Problem" has long puzzled academics, and it shows not just the dualities in Smith's work but also our own uneasy relationship with morality and markets. But it is also necessary to mention the fact that though the two different Smiths are now well connected, there is no single thread that fully links the two works. As David Wilson and William Dixon noted in a 2006 paper in the *Journal of Critical Realism,* "There is still no widely agreed version of what it is that links these two texts, aside from their common author." That is the beauty and mystery of it.

Today, the Das Adam Smith Problem has taken on a broader scope. "How do we integrate the fact that much economic analysis is based on self-regard (via the price mechanism) with renewed interest in and evidence of the importance of pro-social motivations?" Natalie Gold, of the University of Oxford, in her 2020 paper in S*ocial Philosophy & Policy,* writes that it's the renewed Das Adam Smith Problem for the 21st century. Thus, the cornerstone of the Scottish Enlightenment in the 18th century continues to shed light on the world in a renewed spectrum.

(Atanu Biswas is Professor of Statistics, Indian Statistical Institute, Kolkata)

THE DAILY QUIZ

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

A two-year-old party has secured a thumping win in its first electoral outing in Tamil Nadu. A quiz recalling other such first-time triumphs around the world

Vasudevan Mukunth

QUESTION 1

The Sri Lanka Podujana Peramuna party was formed as a vehicle for the _____ family after it lost control of its previous party. In the 2018 local government elections, the SLPP won 231 of the 340 local authorities. The momentum from this win carried the party to a landslide victory in the 2019 presidential and 2020 parliamentary elections. Fill in the blank.

QUESTION 2

Name the firebrand South African politician who, after being expelled from the African National Congress, formed a communist, black nationalist party that in its first electoral outing won 25 seats.

QUESTION 3

Barely a year old and led by billionaire Thanathorn Juangroongruangkit, the X party contested the 2019 elections in Thailand while banking on a progressive platform. It won 81 seats, becoming the third-largest party in Parliament, prompting the military-backed government to perceive it as a major threat. This is why the party was forced to dissolve in a year. Name X.

QUESTION 4

What was the name of the movement that comedian Beppe Grillo launched that made its national debut in the 2013 general election in Italy?

QUESTION 5

The _____ _____ was formed in 1977 after several opposition parties merged together specifically to defeat then Prime Minister Indira Gandhi. The party contested the 1977 general election and, in a monumental shift in fortunes, won 295 out of 542 seats, ending 30 years of uninterrupted rule by the Indian National Congress. Fill in the blanks.

Visual Question:

Name this man. He founded the Israeli party Kadima after splitting from Likud in 2005. He suffered a stroke before the 2006 election and couldn't participate, but Kadima went on to become the largest party in the Knesset that year. He was called the 'Butcher of Beirut'. GOVERNMENT PRESS OFFICE OF ISRAEL (CC BY-SA)

Questions and Answers to the previous day's daily quiz: 1. According to George Lucas, the stories were taken from an ancient journal chronicling the history of the galaxy and written by immortal beings. What were the beings called? **Ans: Whills**
2. Fans use BBY and ABY as a primary timeline marker in the Star Wars lore for Before and After BY. What is BY? **Ans: Battle of Yavin, the decisive conflict where the Rebel Alliance destroyed the Empire's first Death Star**
3. What are the surnames of Mace, Princess Leia, Lando, and Ahsoka? **Ans: Windu, Organa, Calrissian and Tano**
4. To which planets do Chewbacca, Admiral Ackbar, Wicket and Jar Jar Binks belong? **Ans: Kashyyyk, Mon Cala, Endor, Naboo**
5. Which craft measures 34.37m by 25.61 meters, is powered by Girodyne SRB42 sublight engines and can attain a speed of 75 Megalights in the vacuum of space? **Ans: Millennium Falcon**
6. What is the actual name of the 'Cantina band'? **Ans: 'Figrin D'an and the Modal Nodes'**
7. Name the trio of actors who provided the physical presence, voice, and face of Darth Vader in the original trilogy. **Ans: Dave Prowse, James Earl Jones and Sebastian Shaw**
Visual: Identify these loveable characters and name the actor who played the taller droid. **Ans: R2-D2 and C3PO and the actor is Anthony Daniels**
Early Birds: Suchit Narottam | Tito Shiladitya | Sudhir Thapa | Prashant Nain | Astha Kumari

FROM THE ARCHIVES

Know your English

S. Upendran

An animal that is active during the nighttime is called "nocturnal". Is there a word to describe an animal that is active during the daytime? (P. Anand, Chennai)
The word that you are looking for is "diurnal". It is a formal word and cannot be used in all contexts. The "i" in first syllable is like the "ie" in "pie", "die" and "tie". The "ur" is pronounced like the "ir" in words like "shirt", "first", and "thirst". The final "a" is like the "a" in "China". The main stress is on the second syllable. Here are a few examples.

Some species of bats, I am told, are diurnal.

A leopard is a nocturnal animal, not diurnal.

What is the meaning and origin of the expression "to bark up the wrong tree"? (K. Moidu, Kerala)
The expression comes from the sport of raccoon hunting. A raccoon (also spelt racoon) is a small furry animal, which is found mostly in America. These animals, being nocturnal, are hunted at night. In order to catch them, hunters make use of dogs. The dogs' job is to chase these animals and drive them up a tree. Once a raccoon is driven up a tree, the dogs stand under it and keep barking. This is their way of telling their masters that there is an animal hiding in the tree. Sometimes, of course, the dogs pick the wrong tree to bark at – one in which there is no raccoon. So when you say that someone is "barking up the wrong tree", it means he has made the wrong choice. He will not succeed in doing what he wants to because he is following the wrong course of action. Here are a few examples.

If you think you are going to get Sonia's job by being nice to the Chairman, you are barking up the wrong tree.

When Azhar said that he was being discriminated against because he belonged to a minority community, he was barking up the wrong tree.

The idiom is used in informal contexts.

Do you "peel" or "unpeel" an orange? (G. Neelakantan, Bangalore)
You "peel", not "unpeel" an orange. When you say that you have "peeled" something, it means that you have removed its skin.

For example:

Bala spent two hours in the kitchen peeling potatoes.

Yogesh refused to peel the apple.

The word rhymes with "feel", "heel", and "meal".

What is the meaning of "circa"? (N. S. Gundur, Dharwad)
First, let's deal with the pronunciation. The "ir" is pronounced like the "ir" in "bird", "birth", and "shirt". The final "a" is like the "a" in "China". The stress, as you have probably guessed, is on the first syllable.

"Circa" is a formal word that is used before a year to indicate that something happened around that time, but not exactly in that particular year. In other words, it informs you of the approximate year when something happened.

Published in The Hindu on July 04, 2000

Word of the day

Operose:
characterised by effort to the point of exhaustion, especially physical effort

Synonyms: wearisome, tedious, hard

Usage: *He avoided operose work whenever possible.*

Pronunciation: newsth.live/operose

International Phonetic Alphabet: /ɒpərəʊs/

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

WEB EXCLUSIVE
For decades, Bengal was an exception. Now it's a chapter in the saffron story
— By Shibashis Chatterjee
Log on to www.indianexpress.com

WORDLY WISE
Tyranny is the exercise of power beyond right, which no body can have a right to.
—John Locke

The Indian EXPRESS
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RAMNATH GOENKA
IN 1932
BECAUSE THE TRUTH INVOLVES US ALL

Verdicts frame people's push for change – BJP seized that impulse, rivals paid for their standstill

THE RESULTS of the Assembly elections in West Bengal and Tamil Nadu, Assam and Kerala, were undoubtedly shaped by factors that were state-specific. But if there is a binding theme, it is this: The BJP's growth and spread beyond its traditional bastions into new arenas and areas coincides with the declining fortunes of its political opponents. The BJP's energetic rise is also directly the cause of the Opposition's waning, but that may not tell the full story.

Be it the rout of Mamata Banerjee in West Bengal and M K Stalin in Tamil Nadu now, or Nitish Kumar bowing out with Lalu Prasad's RJD failing to hold up its end in Bihar, or the eclipse of Naveen Patnaik in Odisha, or the BJP's longtime ally-turned-rival Uddhav Thackeray presiding over the Sena's splintering in Maharashtra, or the signs of implosion in Arvind Kejriwal's AAP, or be it Congress's seemingly unchecked slide despite its Kerala victory — the downward trajectory of the party on the other side of the BJP is not just because of the BJP, its undimmed aggression and its vast resources. It is also due to the inertia and do-nothingness of the Opposition party, its sameness and staleness in a time when a young and aspirational electorate is on the move, both literally and as part of shifting imagined communities. Quite simply, the BJP's success lies, fundamentally, in constantly finding new ways of speaking to this people, by adding to its layered appeal. And the Opposition's failure comes from its increasing political solipsism, its turning away from the challenges of change, its glib recourse to apocalypse-mongering.

Essentially, the verdicts in West Bengal and Tamil Nadu and Kerala frame the people's push for change. The BJP seized the impulse and built on it in West Bengal, while a new player came in to reap the disillusion with the five-decade-old alternation of parties in Tamil Nadu. Congress benefited from the desire for change in Kerala, while in Assam, the only exception to this story, it failed to become a receptacle for it.

THE outcome in West Bengal, which has been, by far, the most dramatic in this round of elections, with Tamil Nadu coming in second, was made possible, above all, because Mamata Banerjee ignored the warnings. Her party, the TMC, which she led into power by uprooting a 34-year-old Left regime, did not heed the sound of the BJP's footfall, first with only three seats in 2016, which shot up to 77 in the 2021 Assembly elections. It refused to brace for the competition by reflecting on its own shortcomings — be it the failure of its government to pull Bengal out of its economic slump, or its inability to check the corruption and unaccountability growing within the party. Inheriting the "party-society" model from Left rule, the TMC nurtured a network of political entrepreneurs that smudged the lines between party, institution and government like the Left's Syndicate, but unlike it, without any constraints of ideology.

The TMC's standstill laid the ground for the BJP, whose unrelenting determination to capture the state of Syama Prasad Mookerjee, and to stitch the east to its conquests in the country's north and west, has finally met with success. It rides on a Hindu consolidation around the spectre of the "*ghuspaithiya*", projection of Banerjee's politics as "minority appeasement", and a combination of its criticism of Banerjee's governance with an identity politics that was subterranean during Left rule and had risen to the surface under Didi, who opened the floodgates to it.

How the SIR, which in West Bengal, more than in any other state, became an exclusionary exercise, contributed to the outcome, will be known in days to come. The 27 lakh excluded in the controversial second round of deletions, whose appeals are still pending (less than 2,000 were reinstated by the tribunals), are a challenge for the new government to address urgently. For now, however, the spotlight must rest on the scale of the BJP's Bengal's victory.

THE sweep of newcomer Vijay and his party TVK, is at once a rare and familiar phenomenon in Tamil Nadu's politics. Another star is reborn as a leader — in the footsteps, arguably, of MGR and Jayalalithaa, Vijayakanth and Kamal Haasan. But Vijay is also unique. His immersion in Dravidian politics is less explicit and his appeal to the young and to women much more direct. He makes what was for about 50 years a bipolar contest into a triangular fight. Vijay's newness, his straddling of the caste and religious divides, also means that his difficulties begin now — they will lie in delivering on the vaulting expectations that have led to this wide yearning for change, this anti-incumbency verdict in a state that, ironically, ranks among the fastest-growing states in the country.

In Assam, Himanta Biswa Sarma's return is a testament to a politics that is astute in seeing and filling a gap — but also divisive. Sarma has further stamped the BJP's imprimatur in the northeastern state, which also lay outside its traditional geography, and where it has nibbled into Congress and co-opted the AGP. But his unabashedly communal dog-whistle politics — under cover of a campaign against the illegal Bangladeshi Muslim immigrant — presents a challenge in a diverse state of many identities and ethnicities.

In Kerala, the return of the United Democratic Front is a moment to savour for Congress, but it basks in the victory at its own peril. By all accounts, it was a verdict, most of all, against the leadership of Pinarayi Vijayan, who centralised all power unto himself and stunted his own party, evident in the CPM's defeat in erstwhile bastions. Congress must also be acutely conscious that its Kerala win does not give it a secure grip in a state that is traditionally known to change its government every five years.

GOING ahead, the victors' challenge looks formidable. In West Bengal, the BJP has added a state to its kitty that has a strong sense of its cultural exceptionalism and its political history — it will need to tread carefully. In Tamil Nadu, the new player must learn the rules of the game, while playing it differently, lest his sheen wear off too quickly. Congress must own the victory in Kerala that has been handed to it. In Assam, the new Sarma government must lower the polarising pitch. All four new governments must learn to address those who voted for them, and also those who didn't.

Assam-Bengal template will go national. It fuels support for BJP, not resistance

PRATAP BHANU MEHTA

INDIAN POLITICS is a story of vanishing exceptionalisms. The two most entrenched and enduring regional formations have collapsed. Kolkata has fallen; Chennai has cracked. Kerala, true to form, has seen anti-incumbency; the BJP's hold over Assam endures. These results consolidate the unprecedented national electoral prowess of the BJP and the ideological supremacy of Hindutva. It would be churlish to deny the unprecedented power of the Modi-Shah duo in the annals of electoral politics.

Even in a state that prided itself on being as distinctive as Bengal, the BJP has brought about a near-impossible electoral realignment. Even by the standards of its storied history, the BJP's victory in Bengal is a remarkable tribute to its unmatched combination of ambition, perseverance, and political ruthlessness. It is, in a literal sense, a triumph of the will. It has not been stopped by any conventional electoral arithmetic, institutional propriety, identities like language, region or caste, or the embeddedness of a towering figure like Mamata Banerjee.

Defeat in retrospect always seems overdetermined. The fatigue, boredom, the corruption and nepotism, creeping thuggishness, the limits of welfare politics, and regional symbolism created background conditions for a BJP victory. But they would not have translated into victory if three things were not in place. After all, there is no evidence that the BJP will address better many of the discontents that fuelled it to power. The sheer determination of the BJP, the energy of the Modi-Shah duo to persist in hostile terrain, is remarkable. Then there is the belief that politically salient identities are not given. A new Hindu consciousness can be reconfigured through sheer mobilisation to the point where Hindu-Muslim polarisation nearly displaces all other axes. Longstanding grievances are now processed through that template. And finally, something that will be studied for a while, the employment of institutional tactics, from the use of the Election Commission to the taming of the Supreme Court, to create a narrative of the cleaning of the electoral process and a violence-free election. The actual effects of the SIR process will be studied over time. But what was remarkable about it was that the inconvenience and pain it imposed seemed to become a source of the BJP's strength rather than a cause for punishment. Whether or not it decisively tilted the electoral outcome, it became handy for mobilisation and a demonstration of its institutional capture. The Assam-Bengal template will go national. It seems to fuel support for the BJP rather than resistance.

The victory of the Vijay-led TVK is no less a vanquishing of another exceptionalism. Anti-incumbency is the norm in Tamil Nadu. But still, the TVK's victory is unprecedented in the way in which it breaks the duopoly of the DMK and AIADMK. What is remarkable about it is that it breaks the standard assumption that the only way a party can win a regional setting is by playing the regional pride card more strongly — there is nothing natural about that regionalism. But it is also a warning that even relatively successful states like Tamil Nadu, trailblazers in industrialisation and welfare politics alike, are in the grip of dissatisfaction and restlessness, in this case powered by young people. Vijay has done what stars before him, like Vijayakanth, were not able to do, without much of a party organisation or a social movement. Is this form of politics a new canary in the mine?

> If Bengal's history is any guide, the TMC will fade away faster than its vote share suggests, and the DMK is not a Dravidian force in the way it was. The BJP now has an opening in Punjab, and the lesson of Tamil Nadu is that the South is open territory

The BJP has demonstrated a triumph of the will. But its triumphs, while a testament to its furious energy and political imagination, also carry a shadow for Indian democracy. This victory consolidates Amit Shah's position as a national leader and his lead over rivals by a mile: Total command over the party organisation, and an ability to deliver wins in all kinds of contexts, including a straight two-cornered context. It is also a new experiment for India. When one party acquires this degree of organisational dominance and ideological ascendancy, all countervailing forces and voices of dissent will gradually fall away. If Bengal's history is any guide, the Trinamool will fade away faster than its proportion of vote share suggests, and the DMK is not a Dravidian force in the way it was. The BJP now also has an opening in Punjab, and the lesson of Tamil Nadu is that the South is open territory.

The Congress might exult in the fact that all its INDIA bloc rivals have fallen away. But Congress is nowhere near even putting up a minimal resistance and is no match for the BJP's ruthlessness. Its lack of leadership, backward-looking ideas of caste and region, and utter listlessness mean that the regional vacuums will be filled by the BJP more than Congress. Hindutva is now the reigning ideology and identity of the new India. This is not a moment that can be analysed purely in contingent political terms; it is part of the inner conflict over the idea of India since 1857. Much of the template of that conversation over India's identity was laid in 19th-century Bengal, beginning with Bankim. It is only the myopia of the Left and Centre parties that they assumed that regions are irrevocable natural formations that can be opposed to Hindutva. The idea that "Kali" would be pitted against "Ram" was the kind of cultural nonsense where the Left began to believe its own cultural illiteracy. For now, Hindutva is producing a culturally hierarchical order, where the claims of identity imperil India as a zone of freedom. The check on this ideology is not going to be external. We are on a wing and a prayer that the consolidation of this form of Hindutva does not result in deeper exclusion and violence, which is typically the denouement of such nationalisms. For now, India is in the grip of Hindutva supremacy; it has been sold as a utopian dream. There is no rival. What this supremacy does, or what brittleness it masks, only time will tell.

The writer is contributing editor, The Indian Express

Welfare alone doesn't win elections — it's just the floor

BHANU JOSHI

THE VOTES are in. The BJP won in Assam and West Bengal. The DMK, which built India's longest-standing welfare-transfer regime, has lost Tamil Nadu to a new entrant. The UDF has won in Kerala. The familiar explanation will return: Welfare delivered the vote, or could not save the incumbent. Around it will sit the larger argument: Is what we are watching redistribution or freebies?

That debate has its uses, but is now misdescribing the ground. The DMK's loss is the sharpest reminder that welfare alone does not deliver elections. It has become the floor. There is a very thin mechanism for why a transfer would deliver a vote on its own when every party promises it and the next government will continue it. What converts delivery into durability is what each party assembles around it. A decade of fieldwork in Bihar, Bengal and Assam gives three answers; the Tamil Nadu verdict adds a fourth.

Bihar is where the floor proposition is most visible. Nitish Kumar's welfare record is substantial: Bicycles and scholarships for girls, prohibition, Jeevika self-help groups, old-age pensions, and the Mukhyamantri Mahila Rojgar Yojana. Approval on individual schemes exceeded his government's overall performance. By the textbook of incumbency, he should have won on delivery alone. Yet since 2015, he has changed alliance partners three times, each switch a recognition that welfare alone would not keep him there. A student we met in Arwal in 2015 had taken the scholarship, ridden the bicycle to college, and was supporting the BJP-led NDA anyway. Asked why, she answered: "What else matters?" Welfare had given her the floor; she was asking for the ceiling. Kumar's tenure was organised around alliances and demographic recalibration to address what welfare cannot supply: Opportunity, jobs, a politics of forward movement.

Bengal's second leg has always been organisation. In a Nadia village in 2016, an older woman told us why she voted Trinamool: "Earlier you had to know someone in the party to get your work done. Now they ask for bribes outright, but work gets done." The TMC's welfare regime has since become more elaborate and universal: Kanyashree, Lakshmir Bhandar, allowances for unemployed, all rule-based and routed through banks.. But welfare alone has not held the TMC together; organisation has. The *dalla-tantra* the Left perfected and Mamata Banerjee inherited turned a rule-based transfer into a personal gift, and helped keep the BJP's polarisation push from translating into power in 2021. By 2026, both legs were strained. Universalisation has hollowed the cadre's distributive function: Unable to distribute differentially, the local worker shifts to attribution and gatekeeping. The BJP, organisationally thin in Bengal, has substituted federal institutions (paramilitary, EC scheduling, the SIR) and pushed communal mobilisation harder than in 2021. The 2026 contest was welfare plus a strained organisation against welfare plus polarisation propped up by central institutions.

Assam in 2016 looked entirely different. In a freshly resettled village in lower Assam, a young man told us he had switched from AIUDF to AGP overnight: "We have to stay here. We need to be on the winning side." The politics was volatile, candidate-driven, transactional. We were back in Dibrugarh, Golaghat and the Barpeta-Bajali belt this April, and that texture was gone. The women's self-help group has become the routine site of political contact. Allowances for unemployed youth and tea-garden workers sit alongside; the road, the school and the medical college are spoken of in the same breath as the SHG transfer. Around this floor, the BJP has assembled a project of incorporation: Peace accords with insurgent groups, thousands of former combatants returned to the mainstream, and citizenship politics. Welfare brings households in as beneficiaries; incorporation decides which are treated as securely inside the political community and which remain suspect.

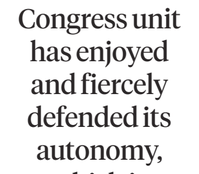
Tamil Nadu, where I have not done fieldwork, is the cleanest test of the floor. The DMK's regime is one of the most elaborate in the country and the one the others copied. By the textbook of welfare delivery, it should have won. It did not. Welfare alone, even from the regime that originated it, did not produce durability against a new entrant tapping different cleavages.

None of these is a handout: Voters reward delivery and punish parties that stop at the floor. None is simply redistribution either; welfare is doing political work that runs beyond the transfer of resources. Welfare without embeddedness, in an alliance, in an organisation, in a project of incorporation, does not by itself deliver. What wins elections is what each party assembles above it.

The writer is visiting assistant professor at Ashoka University and co-founder of Data Action Lab for Emerging Societies (DALES)

> Welfare without embeddedness, in an alliance, in an organisation, in a project of incorporation, does not by itself deliver. What wins elections is what each party assembles above it

In Kerala, a delicate balance has been preserved


K K KAILASH

IMAGINE A glass filled to the brim with water, where a single additional drop risks triggering an overflow and irreversible change. Kerala's closed party system has been balanced at this tipping point for more than a decade. In this election, too, the question was whether that next drop would finally fall and disrupt the established order.

While this election was, on the surface, about whether the LDF would secure a third term or Congress would ride the wave of anti-incumbency, the question at the back of the mind, especially for those outside Kerala, was if the BJP would breach the carefully managed surface tension. The UDF's victory has put that question to rest, for now. Yet, the question of how the closed party system survives in Kerala, especially in the wake of the verdict in Tamil Nadu, is important. In the absence of survey data, we must rely on election results to infer how parties interpret electoral signals.

For the current generation of the BJP's central leadership, high symbolism and winning have been everything. Any win in Kerala has more symbolic than practical value. It allows supporters across the country to believe they are part of some unstoppable force. More importantly, it helps maintain the party's leadership status quo. While the BJP did concentrate on its core constituency, it focused more on development and governance, with its manifesto linking policy proposals to central government programmes and positioning the campaign as a showcase of the PM's record. In a highly centralised party, state elections are adjusted to serve a larger narrative the central leadership wishes to project.

For the CPM, this was a consolidation and maintenance election. Stung by its losses in 2019 and 2024 and unsettled by the BJP's growing popularity, it decided vote chasing was the optimal strategy. It tried to be electorally attractive by pushing its ideology to the background and foregrounding its leader. However, adopting the position of the very party to which it assumes it has lost its voters is not the best strategy. The CPM softened its stance on the entry of women of all ages into the Sabarimala temple, organised events like the Global Ayyappa Conclave, and facilitated the Maha Magha Mahotsavam, dubbed Kerala's Kumbh Mela. This reactive repositioning risks legitimising and popularising the discourse the BJP is trying to mainstream. Comparative studies show such shifts are unlikely to yield electoral gains.

Of all three coalition-makers, this election mattered most to Congress. A third straight loss would have led to cadre disillusionment, may have fragmented the UDF, and dented Congress's image as the national alternative. This might have created more room for the NDA to consolidate anti-Left and disaffected anti-Congress votes. Unlike the CPM, Congress adopted a mobilising strategy and avoided overreaching. Its local unit appeared to have greater autonomy than the BJP. It maintained its traditional position of accommodation, working to retain support among its core constituencies, the minority communities, and emphasising a pragmatic economic policy. More importantly, it did not attempt to either dilute or reinforce its conservative positions.

In a federal system, empowering local party units may be a more suitable strategy, as it gives the organisation flexibility. Kerala's Congress unit has enjoyed and fiercely defended this autonomy, which is arguably its most potent asset and a structural obstacle to the unravelling of Kerala's closed party system.

The writer is with the Department of Political Science, University of Hyderabad. Views are personal

> Kerala's Congress unit has enjoyed and fiercely defended its autonomy, which is arguably its most potent asset and a structural obstacle to the unravelling of Kerala's closed party system

40 YEARS AGO
May 5, 1986

INDIAN EXPRESS
Forty pro-Barnala MLAs go into hiding
Cabinet expansion likely today
Karmal quits as party leader
44 killed in bus accident

Akali Dal crisis

DEVELOPMENTS IN the crisis-ridden Akali Dal following police action in the Golden Temple have taken a new turn with a large number of pro-Barnala legislators leaving for some unknown destination in Himachal Pradesh. The dissident Akali leaders, Parkash Singh Badal, G S Tohra, former SGPC president, and Amrinder Singh, released a list of 29 party legislators who have condemned the police action.

Khaleda Zia reappears

THE MYSTERY which shrouded the "disappearance" of opposition leader Khaleda Zia, ended on the fifth day when she reappeared at the Dhaka district bar library. She said she had been detained by police and was kept in an "unknown place" near Savar, 15 miles from Dhaka. This contradicted the government's continuous denial that she had been arrested. The BNP chief disappeared while she was returning from a rally in Jamalpur.

Afghan leader Karmal resigns

BABRAK KARMAL was relieved as the Afghan ruling party leader. Karmal, who came to power in December 1979, resigned health grounds, Tass reported from Kabul, quoting the Bakhtar news agency.

Bus accident kills 44

ALTOGETHER 44 persons, including 27 men, 13 women and four children, were killed near Kheel, about 40 km from Itanagar, according to official sources. The ill-fated Arunachal Pradesh State Transport bus in which they were travelling fell into a deep gorge while negotiating a difficult curve on the high-altitude road. Sixty-three others were admitted to Ramakrishna Mission and Naharlagun general hospitals. The condition of eight was serious.

WHAT THE OTHERS SAY

Trump should not shift on Taiwan when he visits Beijing.
— The Guardian

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Opposition should go back to drawing board, reimagine politics, rewire machine

DESHKAAL

YOGENDRA YADAV

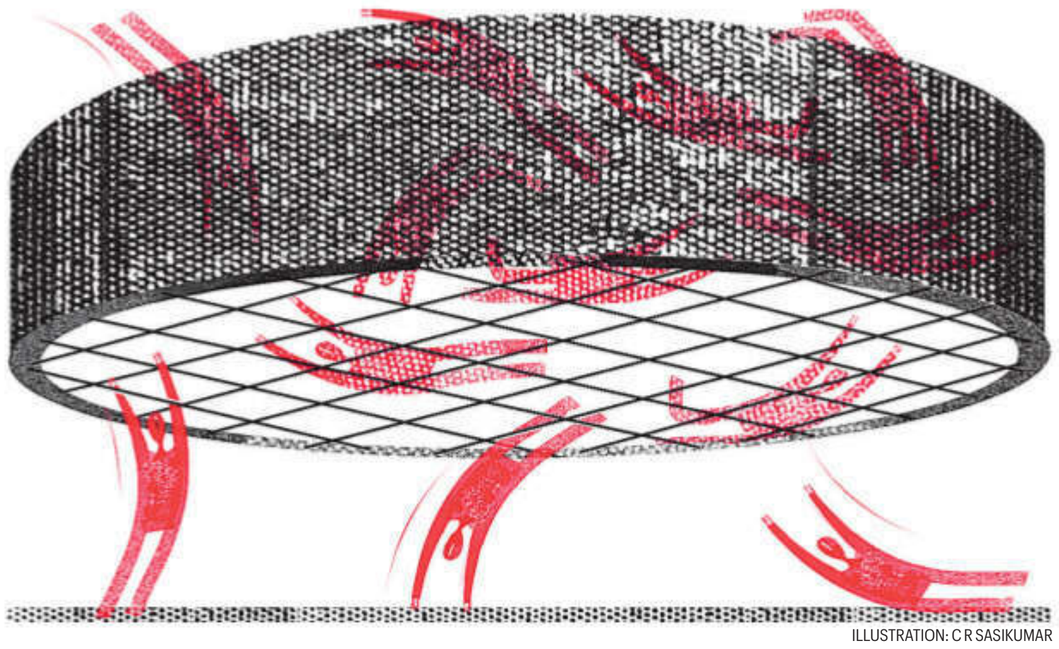

ILLUSTRATION: C R SASIKUMAR

IT IS a moment of reckoning for the democratic Opposition. A moment to reflect. A moment to face some harsh truths. A moment to ask some hard questions.

Let there be no doubt about it: The window of opportunity offered by the stunning outcome of the Lok Sabha elections two years ago, ever narrowing since then, is firmly shut now. The conquest of Bengal is a leap forward in the BJP's quest for total power. It is also a leap backwards in whatever remains of electoral integrity in contemporary India. Unless the Opposition goes back to the drawing board to reimagine its politics, revise its strategy and rewire its election machine, democratic competition is all but dead. Unless someone or something steps in to rebalance the electoral playing field and restore a semblance of fairness, elections may no longer be the arena for the articulation of popular will. And that is bad news, not just for the Opposition but also for the rulers.

Let the outcomes in Kerala and Tamil Nadu not distract us from this stark truth. All that has happened in Kerala is a resumption of a deferred oscillation in power. The routine desire for change and an accumulated unease with the LDF government finally caught up with it. The UDF was the natural beneficiary, with some arrears for the delayed transition added to its victory margin. The Opposition may take solace in the fact that the BJP has not expanded its vote share, but such consolation tends to be temporary in the face of the ruling juggernaut. If anything, the UDF's over-dependence on minority votes should worry it in the long run.

Dramatic and awe-inspiring as the success of Vijay's TVK in Tamil Nadu is, it is no model to be replicated elsewhere. The DMK's dominance, with the attendant hubris and complacency, created a need for an alternative. The ever-crumbling and rebuilt AIADMK did not fit the bill, also as it was seen to be a franchise for the BJP, which went against the political culture of the state. The vacuum had to be filled by someone who fitted into Dravidian ideology but differed from the DMK's political model. Following the well-trodden path laid down by MGR, a film star offered a charming and fresh alternative. It is important to note that while Vijay framed the DMK as the "political opponent", he identified the BJP as an "ideological opponent", declaring himself to be a follower of Periyar, Kamaraj and Ambedkar. Such a space is unique to this state.

Let the Opposition not hide behind any pretexts in Assam. True, the BJP had used the EC to gerrymander the constituency boundaries in a communal pattern to its advantage at an unprecedented scale in India's electoral history. The BJP awarded itself about 10 seats before any vote was cast. Also, the Assam CM unleashed brazen communal hatred against the "*miyan*" community while the EC and the SC watched. Yet that does not take away from the fact that the Opposition did not show any political will to take on the ruling party. The BJP government, especially the CM, was mired in charges of corruption. Zubeen Garg's death was a raw emotional issue that went against the government. Yet the Opposition never looked like it had got its act together. It was a textbook case of how to lose an election.

> The outcome was not a simple reflection of popular will. The BJP's victory was curated by the central government and the EC. The BJP was in shambles in Bengal after the setback in 2024 and was in no shape to take on the TMC

The Opposition in Bengal did not suffer these frailties. No one could accuse Mamata Banerjee of giving a walkover to the BJP. She had a strategy, the stamina and the system to take on the BJP's steamroller. Yes, the Opposition was not united, but it worked to her advantage to have the Left contest separately. Congress damaged the TMC only marginally. Bengal thus was a test case for the Opposition, a state every Opposition leader must have watched with trepidation.

Let's not beat around the bush: Such a massive reversal in electoral fortunes could not have happened without significant "anti-incumbency", a euphemism for popular unease and unhappiness with the government, that remained underestimated. People's anger was not so much against Banerjee herself as against her local leaders and the quality of governance the people received. True, similar and worse levels of governance went unpunished in other states, but the BJP and its loyal media had something to pounce upon. The Opposition must honestly introspect on its own governance record — not just in West Bengal but also in Punjab, Karnataka, Telangana and Himachal — before it draws any plans for national politics.

Finally, let us acknowledge the most unsettling truth of the West Bengal elections. The outcome was not a simple reflection of popular will. The BJP's victory in the state was curated by the central government and the EC. The BJP was in shambles in Bengal after the setback in 2024 and was in no shape to take on the TMC. The central government and the pro-BJP media propped it up. The Centre choked the West Bengal government of resources, shutting down programmes like MGNREGS and PM Awas Yojna. The ECI watched as the BJP launched a vicious communal campaign, more effective in Bengal than in Assam. Above all, unlike any other state, the EC took extraordinary steps to delete 27 lakh names (of the total 90 lakh deletions) of those who had filled enumeration forms and submitted their citizenship documents. Every independent investigation shows these deletions to be wrongful and targeted. These deletions amount to 4.3 per cent of the votes cast in the state. The BJP's lead over the TMC is 4.6 per cent. The question is inescapable: If these 27 lakh persons were allowed to vote, how would it have affected the outcome?

That is the hard question that the Opposition must face together: Have Indian elections fallen below the minimum acceptable threshold of electoral integrity? How can the Opposition refuse to legitimise curated election results without seeming to run away from the battleground? When and where does the Opposition draw the line, if not now, if not after West Bengal?

The writer is member, Swaraj India, and national convenor, Bharat Jodo Abhiyaan. Views are personal

Bengal win shows demographic anxieties cannot be ignored

RAKESH SINHA

THE WEST Bengal assembly results bear an unequivocal message from the state's people against appeasement politics. The Trinamool Congress government not only practised Muslim appeasement, it also failed to address the anxieties of Hindus about the state's demographic transformation. The change is a result of a gap in the fertility rates between the Hindus and Muslims, as well as the influx of people from Bangladesh. Mamata Banerjee, who once fought against Left coercion and won the hearts of the people, lost sight of socio-economic realities and slipped into vote-bank politics. The BJP, in contrast, acknowledged the state's realities and articulated its politics accordingly. Credit goes to Prime Minister Narendra Modi for giving direction to the party's campaign in a state where it lacked strong leadership as well as cadres. In the past, this prevented the consolidation of votes in the party's favour. By leading the campaign, Modi turned a disadvantage into an advantage.

In other states, the BJP has dismantled the tradition of one or two state leaders being seen as faces of the party. Its success rate has been more than expected. West Bengal is the latest example of the strategy's success.

The victory is special for the RSS fraternity in its centenary year. Its founder, K B Hedgewar, was a part of the revolutionary organisation, Anushilan Samiti, as a medicine student in Kolkata. West Bengal has always been a priority area for the party. Syama Prasad Mookerjee, a prominent Hindu Mahasabha leader and later the founder president of the Bharatiya Jana Sangh, was from West Bengal. In the 1952 Lok Sabha elections, Mookerjee and Durgacharan Banerjee from the BJS emerged victorious, and the party secured 5.6 per cent of the vote in the state assembly polls. However, Mookerjee's martyrdom, while he was endeavouring to ensure the complete integration of J&K into the country, created a leadership void. For decades, the BJS and its successor, the BJP, remained only a symbolic force in West Bengal.

The abrogation of Article 370 was a tribute to both Mookerjee and his mother, Jogmaya Devi, who did not get any answer to the question she asked then prime minister Jawaharlal Nehru about the controversial death of her son.

The defeat of the Red-Green ideological club is the completion of the political cycle that began with the participation of BJS candidates in the 1952 elections. The BJP's vote share today is almost nine times what it was in the 1952 elections. The victory gives immense psychological satisfaction to the votaries of Hindutva across the country. It will become part of the RSS's centenary celebrations.

Bengal is the home of intellectual giants who made their mark in the anti-imperialist movement. It came under a communal cloud, particularly Muslim polarisation, instigated by the viceroy Lord Curzon. The partition of Bengal in 1905 was an attack on its identity. The Muslim League's Direct Action Day in 1946 led to the killing of innocent Hindus and left a terrible memory in people's minds. These wounds wouldn't have festered had the political class been alert to what had divided the people in the past. Instead, they perpetuated Curzon's policies for the sake of power.

No society can remain impervious to the challenges posed by changing demographics. In *A Dying Race*, U N Mukerji wrote, "Can the figures of the last Census be regarded in any sense as the forerunner of an Islamic or Christian revival which will threaten the citadel of Hinduism. Or will Hinduism hold its own in the future as it has done through the long ages of the past?" He was referring to the 1901 Census. But the warning fell on deaf ears in the era of Mahatma Gandhi and the Nehrus. Post-Independence politics also ignored demographic imbalance.

The BJP has successfully aroused the consciousness of the Hindus. In the 2016 elections to the West Bengal Assembly, it secured 10.3 per cent of the vote, which increased threefold in 2021. Now it has more than 45 per cent of the vote.

Modi symbolises two things. One, he is a guilt-free votary of anti-appeasement politics and can strike a chord with common people. This is also a message to the intellectual class of the country that they remain disconnected from the psychology and aspirations of the people. Two, Modi symbolises time-bound and target-oriented development. He has lifted the country's development process from the complexities of ideologies.

The people of Bengal have expressed their aspirations for better governance and the reversal of pre-Partition politics. They have sent a strong message to parties — anti-Hindutva politics has no future.

The writer is a former Rajya Sabha member from the BJP

LETTERS TO THE EDITOR

SC on abortion

A HUMANE abortion law must begin by trusting the person whose body, future, and dignity are most directly at stake ('On abortion, SC places the woman at the centre', *IE*, May 4). The Supreme Court's approach rightly moves the issue beyond medical paternalism and moral panic, especially for minors and survivors of sexual violence. Yet judicial compassion cannot substitute for a clear statutory framework. Gestational limits, doctors' discretion and fear of criminal liability still make timely care uncertain, uneven and often traumatic. Parliament should revise the MTP law to make informed consent the rule, medical oversight the safeguard, and delay the exception.

Veda Chidanand, Bengaluru

Ethanol push

INCREASING ETHANOL blending can reduce dependence on imported crude oil, lower emissions, and support farmers by creating new demand for crops ('The next fuel shift: More ethanol in the tank', *IE*, May 4). However, concerns regarding engine compatibility, infrastructure readiness, and water-intensive crop production must be addressed. A balanced approach is essential to ensure that environmental benefits are not offset by agricultural or economic challenges. The government must focus on innovation, proper regulation, and awareness.

Vaibhav Kochar, Ludhiana

INDIA'S ETHANOL push is sensible insurance against oil shocks, but must not become another subsidy-driven shortcut ('The next fuel shift: More ethanol in the tank', I*E*, May 4). Flex-fuel vehicles and dedicated pumps can widen consumer choice, while cheaper domestic blends may ease pressure on oil companies and imports. Yet the policy's credibility will rest on engineering readiness, transparent pricing and feedstock discipline. Engines, warranties and corrosion standards must be settled before motorists are made testers. The real opportunity lies in resilient crops, waste-based alcohol and predictable taxation.

Babu Crishna, Bengaluru

In Tamil Nadu, bugle call of the superstar-outsider

A R VENKATACHALAPATHY

THE DMK, which, according to many pollsters, was set to win comfortably, if not by itself, but at least with the support of its admittedly grumpy alliance partners, has barely pipped the AIADMK to the second position. Chief Minister M K Stalin has lost his pocket borough of Kolathur. A lone exit-poll pundit who predicted a TVK victory was mocked by all-knowing political analysts. Even though technically it is a hung assembly, it is nothing but a tsunami in favour of C Joseph Vijay and his fledgling party. What explains this shocker, and how did political analysts and academics miss this phenomenon?

Riding on a slew of welfare measures and the momentum of three consecutive electoral victories, the DMK clearly misread the depth of the anti-incumbency sentiment. The unseemly hurry to anoint Udhayanidhi Stalin as heir apparent fuelled charges of dynastic politics. The resentment of government employees, extensive use of outsourcing to constrict tenured employment, the ham-handed handling of unionisation efforts, and the unsustainable exploitation of natural resources such as river sand may all have come to a boil now. More proximate causes would include the less-than-smooth negotiations with alliance partners resentful of its big-brother attitude. Yet, the DMK's vote share sits almost level with the TVK. This is less a rejection than a finely balanced contest where a slender shift in votes has produced a dramatic electoral outcome.

> Could 2026 be the inflexion point in the history of the Dravidian movement? After nearly 60 years, a Dravidian party will not be forming a government in Tamil Nadu

If this was the state of the ruling alliance, the AIADMK hardly covered itself with glory. For most of the five years in Opposition, Edappadi K Palaniswami exhausted his energies gaining control of his party and keeping an ever-ambitious BJP in check rather than calling out the ruling party.

Unlike his predecessor Rajinikanth, who harboured similar dreams, age and time are on Vijay's side. It could be argued that the DMK shielded Udhayanidhi in this election campaign, fearing a walkover. Pushing 50, but still sprightly, Vijay has enviable charisma that has captured the imagination of a cross-section of people, cutting across caste, class and religion. Evidently, he has capitalised on an amorphous desire for change in the electorate, who saw an alternative to Dravidian parties for the first time in decades. Though the final margin appears to be not more than a few percentage points, the TVK has inflicted severe damage on the DMK. Even the citadel of Chennai, which has weathered many an anti-DMK storm, has fallen to Vijay's battering ram.

Could 2026 be the inflexion point in the history of the Dravidian movement? After nearly 60 years, a Dravidian party will not be forming a government in Tamil Nadu. What will be the future of "the Dravidian model" that explains the staggering growth of the state on all development parameters? If the DMK claimed all the credit for this model, curiously, the AIADMK, which helmed the state for more years than its rival, disowned it. Vijay's development programme or ideological proclivities are unknown; at best, all one can hope for is a benign populism. What of the future of the Dravidian movement? Will the DMK revive itself? Given that age and health are not on Stalin's side, does Udhayanidhi Stalin have it in him to lead the charge? Will there be a churning within the DMK? Will the AIADMK return to its roots, or will it let the BJP capitalise on the fall of the Dravidian Babylon? These larger questions will have to wait.

For now, what will be the shape of the new government? Even though the TVK is shy of a majority, the *vox populi* is resounding. Vijay remains nominally secular, making it easy for Congress (which, in any case, played footsie with the TVK during seat negotiations) and other parties in the DMK-led alliance, such as the communist parties, and the DMDK (with the possible exception of the Dalit party, Viduthalai Chiruthaigal Katchi) to lend support.

A rank outsider, Vijay has a tough job at hand. At least 100 greenhorn legislators are set to enter the august assembly hall. Apart from his trusted but untested lieutenants, he will necessarily have to rely on experienced administrative and police hands. The shooting floor is chaotic. But the director has blown the whistle. The clapperboard has clacked. Let the show begin.

The writer is co-editor of The Cambridge Companion to Periyar

Behind Assam hat-trick, ideology, incentives, strategy

AKHIL RANJAN DUTTA

WITH THE BJP's hat-trick in Assam, the state has consolidated its position as an enduring fortress of Hindutva. The BJP-led alliance has relied on long-term, deeply embedded strategies spanning civilisational, infrastructural and aspirational narratives. Central to this is the party's "rainbow alliance", which continues to co-opt diverse ethnic communities through targeted, community-specific initiatives.

Chief Minister Himanta Biswa Sarma has played a pivotal role in this consolidation. He has demonstrated a keen understanding of Assam's geographical constraints and its historical and cultural aspirations, linking these effectively to the ideological core of Hindutva and a market-driven political economy. He has also managed a complex political terrain marked by discontent among Assamese nationalists over the unresolved National Register of Citizens and the implementation of the Citizenship (Amendment) Act, 2019. The decade-long grassroots expansion of the Sangh Parivar across socio-cultural and developmental spheres has further strengthened the BJP's position. At the same time, a fragmented Opposition, last-minute defections of Congress leaders, and an over-reliance on civil society to broker alliances weakened any credible challenge.

The Sarma government has pursued its civilisational agenda with clarity, often targeting minority Muslims as encroachers and threats to indigenous culture. The 2023 delimitation exercise formed a key part of this strategy. It increased SC and ST constituencies while significantly benefiting Bodoland, where the number of seats rose from 11 to 15. At the same time, delimitation was strategically executed in Muslim-majority districts such as Barpeta, Darrang, Dhubri, Goalpara, Karimganj, and Hailakandi.

The BJP has complemented its ideological position with expansive welfare and development initiatives. It has rolled out a wide range of subsidy-based and entrepreneurial schemes such as Nijut Moina and Nijut Babu. These schemes help soften ideological boundaries and broaden electoral appeal.

> The BJP has complemented its ideological positioning with expansive welfare and development initiatives

Women have been a central focus of the BJP's outreach. The Orunodoi scheme, under which around 40 lakh women receive Rs 1,250 monthly, has been particularly significant. In March, beneficiaries received a consolidated Rs 9,000 payment covering four months of assistance along with a Bihu bonus — an intervention that likely had a tangible electoral impact. The promise to raise this assistance to Rs 3,000 and extend coverage to 15 lakh more households reinforces the party's welfare plank.

Coordination between the state and the Centre has also bolstered public perception. Assam's decision to constitute the Eighth Pay Commission for state employees — the first in India — signals administrative responsiveness. Meanwhile, infrastructure expansion under programmes like Bharatmala and Asom Mala has improved connectivity and stimulated rural economies in districts such as Lakhimpur, Dhemaji, and Majuli.

The BJP has also paid careful attention to community-specific interventions, particularly among tea tribes. Land entitlement initiatives and enhanced political representation at both state and national levels have helped consolidate its base in Upper Assam.

The BJP-led alliance's victory in Assam reflects a calibrated strategy that blends religious polarisation with welfare delivery and infrastructure development. By sustaining aspirations across social groups while integrating diverse ethnic and tribal communities into its fold, the party has translated its political approach into electoral dominance.

The writer teaches Political Science at Gauhati University

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• POLITICS

Results cement national parties' rise, state leaders lose more ground

Vikas Pathak
New Delhi, May 4

WITH THE defeat of the All-India Trinamool Congress (TMC) after 15 years in power in West Bengal and the surprise defeat of the Dravida Munnetra Kazhagam (DMK) in Tamil Nadu, the standing of regional parties has hit a new low.

Although the Tamilaga Vettri Kazhagam (TVK) is a new regional player that has done very well in Tamil Nadu, the regional framing of polls in the southern state has nevertheless suffered a loss, as the DMK was the strongest proponent of Tamil identity and politics. Anti-incumbency defeated the DMK's dogged framing of the elections as one to be fought around Tamil pride, with Chief Minister M K Stalin — who was championing the Tamil cause — losing his own seat.

This is just the latest jolt to regional politics. While the Aam Aadmi Party (AAP) is technically a national party, it was powerful only in certain regions like Punjab and Delhi. Its footprint, however, has been shrinking. Recently, the AAP lost seven Rajya Sabha MPs to the BJP, a year after losing the Delhi Assembly to the saffron party.

The Communist Party of India (Marxist), or CPI(M), which is also technically a national party, had in effect shrunk to one state, Kerala, thus becoming strictly a regional player. The victory of the Congress, another national party, over the CPI(M) in Kerala means that another force in a single state has suffered a setback. Similarly, the BJP defeated Naveen Patnaik's Biju Janata Dal in Odisha in 2024, ending Patnaik's 24-year stint as CM.

One regional party that has bucked the trend after 2024 is Hemant Soren's Jharkhand Mukti Morcha, which succeeded in beating the BJP in the last Assembly polls. Besides that, Omar Abdullah's National Conference is holding its own in Jammu and Kashmir.

The shift

The electoral turn of the past two years, thus, shows a shift towards national parties. This comes at a time when the Opposition has been flagging federal concerns and accusing the Centre of withholding funds, misusing agencies against its leaders, and also trying to change India's "electoral map" through delimitation on the latest census figures, which would diminish the relative share of the southern states in the Lok Sabha.

• COALITION ERA

- The period from the decline of the Congress post-1989 marked the high point of regional parties, leading to 25 years of coalition politics.
- The rise of Modi in 2014 unsettled this equilibrium. The BJP began to dominate western, central, and northern India.

The period from the decline of the Congress post-1989 marked the high point of regional parties, leading to 25 years of coalition politics. At the national level, the National Democratic Alliance (NDA), carved out by the BJP with multiple regional parties, and the United Progressive Alliance, having the Congress and "secular" regional parties, ran coalition governments that had to be sensitive towards regional concerns to survive.

The rise of Narendra Modi in 2014 unsettled this equilibrium. The BJP began to dominate western, central, and northern India, leading to a decline in the standing of the SP, the Rashtriya Janata Dal, the Bahujan Samaj Party, the Shiv Sena, and the Nationalist Congress Party. Of these, the last two split during Modi's second term: the factions that got the original party symbol then joined hands with the NDA. The Janata Dal (United), or JD(U), survived in Bihar, with Nitish Kumar nimbly moving from the NDA to the Opposition and back. However, even in Bihar, the pattern of a move towards national politics picked up, finally installing a BJP CM in the state.

Challenge for the Opposition

The Opposition's challenge is that while it is flagging federal concerns, voters seem to be moving towards national parties, particularly the BJP, with each passing year. With the Congress, despite its improved showing in 2024 when it secured 99 seats in the Lok Sabha, not being able to emerge as an alternative to the BJP in the last 12 years, the need for Opposition unity has made multiple parties articulate the language of federal concerns. The cases filed against many Opposition leaders have added to the framing of politics in federal terms. This however, is not impacting voter behaviour, with recent cycles of state polls showing the BJP emerging as more powerful.

It is largely in south India that regional parties are still influential. But they are under pressure here, too. Even in Telangana in December 2023, the Congress was able to defeat the Bharat Rashtra Samithi, a regional party that had years ago taken credit for the state's formation.

The perception that its fall from 303 to 240 seats in the Lok Sabha in 2024 would dent the BJP has not proved correct so far. Its allies, the JD(U) and the Telugu Desam Party, have backed it, even on the Constitution (131st Amendment) Bill, which the Opposition had framed as a ruse to bring in delimitation to the detriment of southern states.

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• ECONOMICS

Jobs to GDP to debt: State of poll state economies

A look at fiscal health of states is essential to understand voters' choices and recognise the challenges Chief Ministers will face

UDIT MISRA

ACROSS FOUR very different states — Assam, Kerala, Tamil Nadu, and West Bengal — voters gave resounding mandates in the 2026 Assembly elections. The landslide victories underscored how decidedly voters wanted to either punish the incumbent and summarily change the way their states were being governed or, as was the case in Assam, to reward the incumbent without hesitation.

Here's a look at some of the key macroeconomic data and the state government's fiscal health. This is not just to understand why voters might have chosen the way they did, but also to recognise the main challenges the incoming Chief Ministers face.

State of economic growth and people's incomes

Chart 1 captures a broader trend of how each of the four states grew and what happened to average incomes in each of the states over a decade between 2015 to 2024.

Over this decade, Assam's gross state domestic product (GSDP) — a measure of the overall size of the economy — not only grew at the fastest rate among the four states in question but also has been one of the fastest across India. Among the larger states, only Telangana registered a faster growth rate during this period.

As a result, Assam registered the fastest growth rate in per capita incomes, beating not just Telangana but also other prosperous states such as Gujarat and Karnataka. Even though Assam's per capita GSDP is still the lowest in this comparison, it has almost trebled to catch up with West Bengal. The two states that were bastions of Left parties, West Bengal and Kerala, continued to post modest gains for their people with per capita GSDP growing at a rate below 5%.

Tamil Nadu has fared better over the past decade, and an average resident of the state is now richer than their next-door neighbour in Kerala, thanks to substantially faster growth rates both of the overall economy and per capita incomes. Kerala had registered the slowest growth rate in overall economic size — a pace that has seen some other states (such as Telangana and Gujarat) jump ahead in per capita incomes.

State of (un)employment

India is undergoing a demographic transition with millions joining the working age population, and this has created a growing challenge for governments in the form of unemployment.

Chart 2 maps two key metrics in this regard. The Labour Force Participation Rate (LFPR) essentially tells the demand for jobs in a state. Higher the LFPR, more the percentage of people in the working age group who are actively looking for a job.

Compared with the national average of 55.1%, all the states that went to polls had a higher demand for jobs. None more so than West Bengal, which also had the highest unemployment rate among the four states. The unemployment rate is the percentage of people who were looking for a job but did not get it.

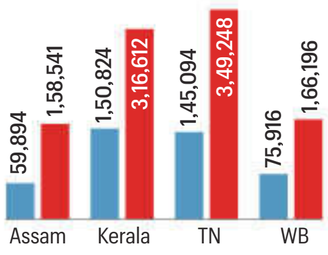
West Bengal's unemployment rate was substantially higher than the national average, while Kerala's was the lowest and substantially lower than the country's average. Tamil Nadu's unemployment rate might be lower than West Bengal's, but one has to take into account the lower demand for jobs as well. For instance, even with lower LFPR than Assam, Tamil Nadu has been witnessing a higher unemployment rate, suggesting there was elevated stress among voters when it came to jobs.

BJP supporters celebrate the party's victory in the West Bengal Assembly election in Salt Lake, Kolkata, on Monday. PARTHA PAUL

• THE STORY SO FAR

1. The state of income growth

PER CAPITA GSDP (in Rs cr)



COMPOUND ANNUAL GROWTH RATE (CAGR, in %)

State	Per capita GSDP	GSDP
Assam	7.80%	11.40%
Kerala	4.90%	8.60%
TN	6.40%	10.30%
WB	4.90%	9.10%

NOTE: PER CAPITA INCOME, OWN REVENUE, AND EXPENDITURE HAVE BEEN CALCULATED USING STATE-WISE POPULATION PROJECTIONS FOR THE RESPECTIVE YEARS USING POPULATION PROJECTIONS BY THE NATIONAL COMMISSION OF POPULATION.
SOURCES: RBI; MOSPI; NATIONAL COMMISSION ON POPULATION; STATE BUDGET DOCUMENTS OF VARIOUS STATES FOR 2025-26; PRS

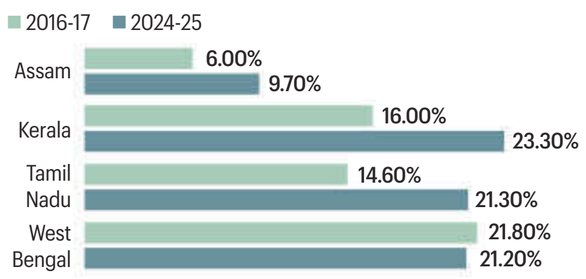
2. State of unemployment

States	Labour Force Participation Rate in % (July-Sept 2025-26)	Unemployment Rate*
Assam	60.4	5.2
Kerala	59.4	3.7
Tamil Nadu	58.6	5.7
West Bengal	61	6.1
India	55.1	5.2

*ACCORDING TO CURRENT WEEKLY STATUS FOR PERSONS 15 YEARS AND ABOVE; SOURCE: ECONOMIC SURVEY 2026

3. Rising interest burden for govts

INTEREST PAYMENTS AS A % OF REVENUE RECEIPTS



SOURCES: RBI; CAG; MOSPI; PRS

4. State of govt finances

State	Fiscal Deficit as a % of Gross State Domestic Product	Revenue Deficit as a % of GSDP	Unconditional Cash Transfers as a % of revenue receipts
Assam	2.5	0	4.30%
Kerala	3	-1.9	NA
TN	2.8	-1.2	4.20%
WB	3.2	-1.7	10%

SOURCE: PRS; ALL DATA IS 2025-26 BE

VERDICT 2026

State of government finances

However, before any Chief Minister can address these macroeconomic parameters, they will have to first set in order the health of government finances. A government that has already borrowed more than its capacity, one that is saddled with the burden of paying back past loans, or one that is spending too much on freebies instead of creating new productive assets, cannot reignite a state's growth story.

Charts 3 and *4* lay down some of the key metrics that the incoming Chief Ministers will have to contend with.

The first metric is fiscal deficit as a percentage of the state's economy. Fiscal deficit essentially refers to the amount of money a state government can borrow from the market to meet the gap between its revenues and expenses. Prudential norms peg it to be 3% or lower. As things stand, West Bengal was the one state that exceeded this prudential norm.

But another key metric — revenue deficit or gap between a state's revenue expenditure and revenue receipts — shows that while the overall borrowing levels may not be as high, the borrowed money is being used by many just to meet day-to-day gaps in expenditure and revenues.

Ideally, the 3% fiscal deficit should be used to invest in capital expenditure — the kind that creates productive capacity in the economy like making roads, railways and ports, etc. But if a state has a revenue deficit, it implies that the government is borrowing to meet its everyday expenses such as salaries and pensions. Barring Assam, the other three slip up on this metric.

A growing worry in this regard is the growth of unconditional cash transfers by state governments in aid to alleviate economic distress among voters and to purchase allegiance. West Bengal, for example, has been spending 10% of all its revenue receipts on such doles. Read in the context of a revenue deficit, this essentially means the state government is borrowing to dole out cash.

Lastly, when governments borrow recklessly for years, the interest on past loans starts to pile up. *Chart 3* shows how all the states have racked up high interest payment bills. West Bengal's number does not show as much growth but it was high to begin with, whereas Kerala and Tamil Nadu's liability in this regard has shot up.

• IN NUMBERS

With BJP winning Bengal, how India's political map changes

Anjishnu Das
New Delhi, May 4

WITH THE BJP on track to notch a remarkable first-ever win in West Bengal by unseating the Trinamool Congress (TMC), the saffron party and its NDA allies are now in power in 22 state Assemblies, up from 21 at the end of 2025.

The BJP is en route to retaining power in Assam, while ally All India NR Congress (AINRC) is holding on to Puducherry. The NDA has struggled to make inroads in Kerala, and the All India Anna Dravida Munnetra Kazhagam (AIADMK) stands in third place in Tamil Nadu. Poll debutant Tamilaga Vettri Kazhagam (TVK), led by actor-turned-politician Vijay, is on course to displace INDIA bloc member Dravida Munnetra Kazhagam (DMK) from power in Tamil Nadu.

On the Opposition front, the INDIA bloc parties are set to hold power in six states — Jammu and Kashmir, Himachal Pradesh, Jharkhand, Telangana, Karnataka and now Kerala.

The Congress-led United Democratic Front (UDF) looks set to return to power in Kerala after a decade of the Pinarayi Vijayan-led Left Democratic Front (LDF)'s rule. Kerala was the last remaining Left stronghold across the country.

The loss will mark the first time since 1977 that no state in India has a communist government. Three states — Kerala, Tripura and West Bengal — have had communist governments in their history, but all have seen the ideology's influence wane in recent years.

Among the other non-NDA parties, the Aam Aadmi Party (AAP) will look to defend its Punjab bastion in 2027 and the Zoram People's Movement (ZPM) holds Mizoram.

The DMK had been a major INDIA bloc ally, including in Parliament, and had been raising national issues to take on the BJP, ranging from language imposition to delimitation. Though its defeat in Tamil Nadu has brought the INDIA bloc down by two states, the Congress's expected win in Kerala will compensate for the loss.

While the TMC has also been in the INDIA bloc, because it has diverged from the alliance on some key issues, this article does not include it in the INDIA numbers. In the 2024 Lok Sabha elections, the TMC decided to contest alone in West Bengal, after differences with the INDIA bloc.

In all, an Opposition party is now set to be in power in nine states and Union Territories (UT).

Since 2014, when the Narendra Modi-led BJP first came to power at the Centre, the BJP and its allies have made significant gains across the country, including winning several states for the first time and striking key alliances in others. In doing so, it has shed the image of a primarily north Indian party.

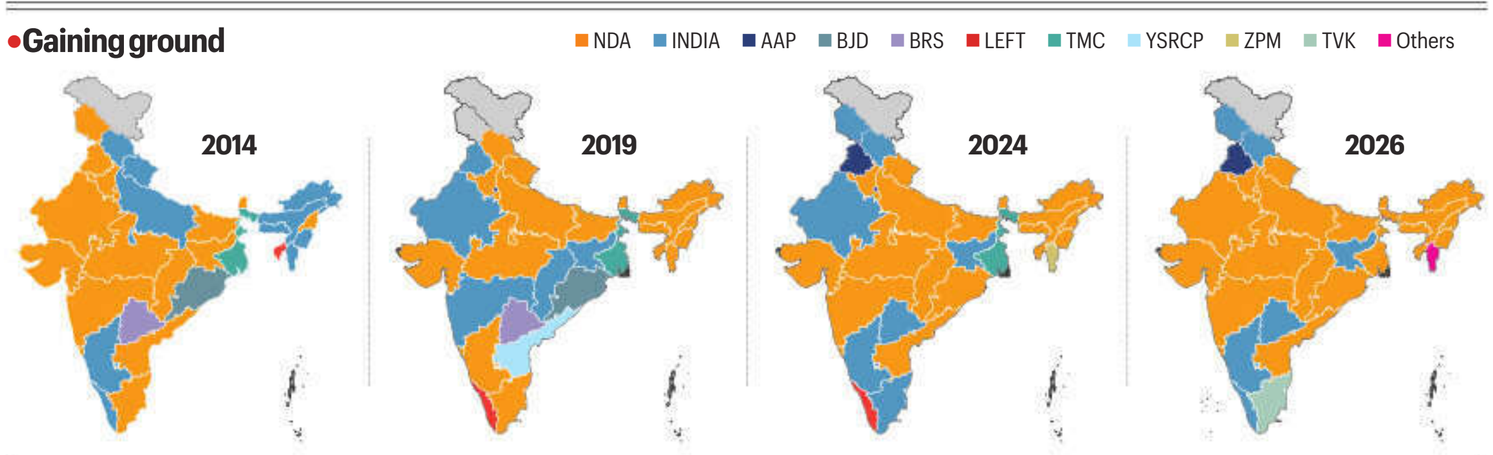
In 2014, the NDA was in power in 16 states, the current constituents of the INDIA bloc in 10 states, and other regional outfits in another five.

By 2019, the NDA had expanded to 18 states while the present INDIA bloc fell to six (Punjab, Rajasthan, Maharashtra, Chhattisgarh, Jharkhand and Puducherry), though regional parties managed to hold on to another six (West Bengal, Odisha, Andhra Pradesh, Telangana, Delhi, and Kerala). At the end of 2024, the NDA grew to 18 states and the INDIA bloc remained at six, with regional parties at five.

Now, only three states are ruled by non-BJP, non-INDIA bloc parties (Punjab, Tripura and Tamil Nadu). In 2014, the BJP on its own had held power in just seven states, requiring the strength of allies, including major regional parties, in another nine states where the NDA was in power.

In 2019, there were 10 states where the BJP was in power on its own. This figure grew to 12 states by 2024, and currently stands at 14 states.

• Gaining ground



Shrinking Opposition

- In all, an Opposition party is now set to be in power in nine states and Union Territories.

LESSONS LEARNT FROM CURRENT CRISIS SHOULD LEAD TO MORE STORAGE: PETRONET LNG CEO

India may expand LNG storage to manage future supply crises

Sukalp Sharma
New Delhi, May 4

Additional LNG storage buffers may have helped blunt the impactof the Strait of Hormuz blockade. PETRONET LNG/WEBSITE

THE LIQUEFIED natural gas (LNG) supply disruption due to the closure of the Strait of Hormuz amid the West Asia war has underscored the need for having more LNG storage capacity in India to cushion geopolitical and supply shocks, and all stakeholders in the sector are now serious about increasing the capacity by adding more storage tanks, according to the chief executive of India's largest LNG importer Petronet LNG.

"Definitely, taking cue from this present crisis, all stakeholders are seriously thinking about increasing the storage capacity... I'm quite sure that very soon you will seeing activity in this regard," Petronet LNG CEO AK Singh told reporters on Monday, adding that the company already has firm plans to increase its cryogenic LNG tanks by about 70%.

Singh added that there is "serious movement" in this regard even at the government level, and hopefully, the "lessons learnt" from the current crisis will lead to creation of additional LNG stockpiles in the country.

How much should be the optimum reserve storage capacity is a question that is being actively deliberated upon. India has strategic and commercial stockpiles of crude oil as reserves, but hardly any of LNG.

Petronet LNG itself is looking at adding storage tanks at its LNG terminals. It has eight LNG tanks at its flagship Dahej terminal and two at its terminal at Kochi. Singh said the under-execution Gopalpur terminal project will add two tanks, and the firm is looking to add another tank at Kochi terminal. As for Dahej, Petronet LNG is looking to add four tanks, and is looking at land availability for it.

India depends on LNG imports to meet about half of its natural gas requirement, and about 60% of those imports came through the critical maritime chokepoint of the Strait of Hormuz, primarily from India's largest supplier Qatar, and also the UAE. Vessel movements through the strait have halted due the conflict. Not one LNG cargo has reached India from the Persian Gulf for over two months now, hitting supplies even as India has been trying to augment supplies by sourcing LNG from alternative sources.

With LNG imports under pressure, the Centre was forced to prioritise natural gas supplies to certain critical segments like transportation and household kitchens, while rationing the flow to some industries.

As per industry analysts, having additional LNG storage buffers could have helped blunt the impact of the unprecedented blockade of the strait, something that was considered extremely improbable, but still happened. Currently, India has 23 LNG tanks spread across its various LNG terminals, and Petronet LNG alone accounts for 10 of those.

While these tanks provide short-term buffer, they are mostly geared for continuous operations of the regasification terminals, and aren't seen as emergency stockpile capacity. One tank usually accommodates one LNG shipload, and India's LNG consumption is about 1.25 tanks a day, Singh explained.

Since LNG tanks have to be cryogenic in order to keep LNG in the liquid state, building them is an expensive proposition and a longer-term project as compared to building a tank to hold other liquid fuels. As per Singh, it will take at least three years for a new tank to be constructed, which can only start once all the pre-project activities are complete and the requisite approvals are in place. He said the initiative is still at the planning stage, and did not comment on the likely execution timeline.

No plans to extend financial support to oil companies: Govt

ENS Economic Bureau
New Delhi, May 4

THE GOVERNMENT has no plan at present to compensate public sector oil marketing companies (OMCs) for their losses on sale of petrol, diesel, and jet fuel below market prices, a senior Petroleum Ministry official said on Monday. The comments come at a time when there are discussions within the government on the possibility of hiking fuel prices, particularly petrol and diesel.

Despite the surge in international oil and fuel prices amid the West Asia crisis, retail prices of regular petrol and diesel have not been hiked.

In the case of ATF, or jet fuel, just about 25% of the price increase was passed on for domestic flights on April 1, although a full passthrough was done for international flights.

Consequently, public sector OMCs — Indian Oil Corporation, Bharat Petroleum Corporation, and Hindustan Petroleum Corporation — are incurring heavy losses on the sale of these fuels, and have been pushing for price hikes, it is learnt. Petrol and diesel prices have not been hiked for over four years in India.

Moreover, the timing of the current global surge in prices, which clashed with assembly elections in some states, made it politically fraught for prices to be hiked. In the absence of price increases, the OMCs are facing significant financial burden. But the Centre has no proposal to extend any financial support to the companies.

"Currently there is no proposal before the government of India to support the OMCs (for their losses on fuel sales)," Petroleum Ministry Joint Secretary Sujata Sharma said in response to a question at the inter-ministerial press briefing on the West Asia crisis.

She also noted that by not hiking the prices of regular petrol and diesel, the OMCs have been contributing in keeping inflation in check.

The OMCs are also incurring heavy under-recoveries on sale of liquefied petroleum gas (LPG) to households, even as they have hiked prices of commercial and industrial LPG in line with international prices movements.

But unlike petrol, diesel, and jet fuel, the Centre has over the past few years provided subsidy support to the OMCs for losses on domestic LPG sales, and that cannot be ruled out even this time around, industry officials said. With the recently-held state elections having now concluded, a hike in prices of fuels like petrol, diesel, and the domestic LPG could be in the offing in the coming days or weeks, according to highly placed sources in the government.

FULL REPORT ON WWW.INDIANEXPRESS.COM

'Centre not insulated from how states react to Strait of Hormuz crisis'

Siddharth Upasani
New Delhi, May 4

> **I can tell you that the sovereign is not insulated by how states respond to the Strait of Hormuz, because ultimately combined fiscal deficit is what feeds into the CAD"**
>
> **V ANANTHA NAGESWARAN,** CHIEF ECONOMIC ADVISOR

THE INDIAN government is "not insulated" from how states react to the West Asia crisis, Chief Economic Advisor (CEA) V Anantha Nageswaran said, adding that demand for more funds due from fiscally-stretched states at a time of external shock adds to the Centre's own challenges.

Speaking at a seminar on state finances organised by the Institute of Economic Growth on Monday, Nageswaran said any honest assessment of state finances must be against the challenging global backdrop. And while the shocks don't originate at the state level, that's where they are absorbed, with stress landing on areas such as food and fuel subsidies, fertiliser allocation, agricultural support, and employment programmes.

"In other words, states are not insulated from what happens in the Strait of Hormuz. And I can also tell you that the sovereign is not insulated by how states respond to the Strait of Hormuz as well, because ultimately the combined fiscal deficit is what feeds into the current account deficit," the government's top economist said.

While the Centre's fiscal deficit target of 4.3% of GDP for 2026-27 has come under pressure due to the rising costs from the impact of the war in West Asia, international investors and global ratings agencies look at the combined deficit at the national and state level.

Referring to a recent finance ministry analysis of 18 states' budgets for 2026-27 that found half of them were set to post a revenue deficit, Nageswaran said that when external shocks hit, it is fiscally-constrained states that "press the hardest on the Centre and they do so at the very moment when the Centre itself is going to be facing significant challenges in the current financial year in meeting its fiscal deficit goals".

"The resulting dynamic therefore places stress on the general government fiscal position which is now assessed by global investors as an integrated whole, not merely as a Union government number... Fiscal indiscipline at the subnational level is no longer a closed, domestic accounting matter. It is visible and it is priced," he said.

While the Centre has largely shielded households from the energy shock caused by the war in West Asia, the fiscal arithmetic has become "more complicated and will likely remain so" for much of FY27, Nageswaran said Monday, with fertiliser costs set to be substantially higher, leading to a higher subsidy bill. Saying that India's public finances is in "very large measure a story of its states", the CEA said that as the country moves towards a higher income status, the efficiency and quality of resource allocation at the state level will increasingly determine not just the pace of growth but how inclusive and sustainable it is.

In its Monthly Economic Review report for April, released last week, the finance ministry had said of the 18 states whose FY27 budgets had been analysed, eight — Odisha, Jharkhand, Uttar Pradesh, Goa, Gujarat, Uttarakhand, Telangana, and Bihar — were expected to post a revenue surplus, with an average fiscal deficit of 2.94%, interest payments amounting to 8.61% of revenue receipts, and outstanding liabilities and capital outlay at 24.24% and 4.08% of their state GDP, respectively.

In contrast, nine states — Chhattisgarh, Maharashtra, Karnataka, Haryana, Rajasthan, Andhra Pradesh, Kerala, Punjab, Himachal Pradesh — with a budgeted revenue deficit in 2026-27 had worse average numbers across the board: a fiscal deficit of 3.44%, interest payments at 16.1% of revenue receipts, and outstanding liabilities and capital outlay at 31.6% and 2.04% of state GDPs, respectively.

FULL REPORT ON WWW.INDIANEXPRESS.COM

'Central bank explores steps to mobilise dollar inflows as rupee slides'

Reuters
Mumbai, May 4

THE RESERVE Bank of India (RBI) is studying ways to mobilise dollar inflows to bolster its foreign exchange buffers and cushion rising pressure on the rupee from a spike in oil prices driven by the Iran war, three sources familiar with the discussions told *Reuters*.

The rupee has slumped 5.5% this year, sliding to an all-time low of 95.33 per dollar last Thursday, while foreign exchange reserves have fallen from a peak of $728.5 billion and equity outflows have hit $19 billion over March and April alone.

The RBI has maintained it is comfortable with its reserves — enough to cover 11 months of imports — but the latest policy discussions underscore fresh urgency to bolster defences amid capital outflows. The discussions at the RBI have not been previously reported, though analysts have speculated about how authorities might resurrect elements of their crisis-era playbook.

Among the steps being considered is reviving a mechanism last used in 2013 to draw in dollar deposits from non-resident Indians, two of these sources said. A second option being discussed is eliminating withholding tax on overseas government bond investors to encourage flows, they said.

No final decision has been taken, and any move would be made in consultation with the government, the third source said. *Reuters* could not establish when a decision would be taken.

"Both are under serious consideration," the source added, noting that the final decision on taxation rests with the finance ministry.

The sources declined to be identified since they are not authorised to speak to the media.

An email to the RBI and the federal finance ministry seeking comment was not immediately answered.

The war between the US, Israel and Iran has weakened the Indian currency, adding to a near 5% fall in 2025. The two measures under consideration could help draw in dollars from overseas.

The deposit scheme was used to stabilise the rupee in 2013 and brought in about $26 billion at a time when US interest rates were close to zero.

NCLAT UPHOLDS ADANI BID FOR JAIPRAKASH ASSOCIATES

Vedanta plea against Adani dismissed: 'No merit in appeal'

George Mathew
Mumbai, May 4

> ***Adani Group emerged as the winning bidder for Jaiprakash Associates despite being outbid by Vedanta by nearly Rs 2,000 crore***

THE NATIONAL Company Law Appellate Tribunal (NCLAT) on Monday dismissed the petitions filed by Vedanta Ltd, owned by Anil Agarwal, which challenged the selection of Adani Enterprises' bid for the debt-ridden Jaiprakash Associates Ltd (JAL).

A two-member bench comprising Chairperson Ashok Bhushan and Member (Technical) Barun Mitra said, "No grounds have been made out by the appellant (Vedanta) to interfere with the decision of the adjudicating authority (NCLT). We do not find any merit in the appeal. The appeal is accordingly dismissed. There shall be no order as to costs."

"We also find that no material irregularity was committed by the Resolution Professional in conducting the process. No grounds have been made out by the appellant to interfere with the impugned order dated November 11, 2025," it said.

NCLAT dismissed Vedanta's plea, where it had questioned the evaluation metrics adopted and had said its bid was Rs 3,400 crore higher in gross value terms and roughly Rs 500 crore more in net present value compared to the Adani Group's bid. It said the decision of the Committee of Creditors (CoC) to not approve the resolution plan of the appellant with a higher plan value of Rs 3,400 crore and NPV of Rs 500 crore as compared to plan of respondent (Adani) cannot be said to be arbitrary or perverse.

Vedanta approached the NCLAT in March, challenging the National Company Law Tribunal's (NCLT) approval to Adani Group's resolution plan for acquiring debt-laden Jaiprakash Associates under the Insolvency and Bankruptcy Code.

NCLT, Allahabad branch, pronounced an order on March 17, 2026 approving the resolution plan dated October 14, 2025 submitted by Adani Enterprises Ltd (AEL). AEL raced ahead and outbid Vedanta for JAL.

Adani Enterprises had earlier secured the CoC approval — dominated by National Asset Reconstruction Company Ltd — for its Rs 14,535 crore bid to acquire Jaiprakash Associates in November 2025. It emerged as the winning bidder for Jaiprakash Associates despite being outbid by Vedanta by nearly Rs 2,000 crore.

The auction attracted interest from five major players — Adani, Vedanta, Dalmia Cement, Jindal Power and PNC Infratech. While the floor price was Rs 12,000 crore, only Adani and Vedanta remained in the final round. Vedanta submitted the higher overall bid of around Rs 16,000 crore, which included an upfront payment and the balance to be paid over five years. In contrast, Adani's bid totalled Rs 14,535 crore, featuring a higher upfront component of over Rs 6,000 crore, with the remaining scheduled for payment within two years.

FULL REPORT ON WWW.INDIANEXPRESS.COM

Direct taxes log 5-yr low growth of 5.1% in FY26, fall short of target

Kuldeep Singh
New Delhi, May 4

INDIA'S DIRECT tax collections after refunds grew at a five-year low of just 5.12% year-on-year in FY26 (provisional figures) and fell short of the revised estimates of Rs 24.21 lakh crore by Rs 80,594 crore, according to data released by the Central Board of Direct Taxes (CBDT) on Monday. Personal income tax (PIT) collections grew by a mere 0.03% y-o-y.

In absolute terms, direct tax collections after refunds stood at Rs 23.40 lakh crore, lower than the revised estimate of Rs 24.21 lakh crore. Corporate tax collections were Rs 10.99 lakh crore against the revised estimate of Rs 11.09 lakh crore, while non-corporate tax collections stood at Rs 11.83 lakh crore against the revised estimate of Rs 13.12 lakh crore. Non-corporate taxes include those paid by individuals, HUFs, firms, local authorities, artificial juridical persons, etc.

Corporate tax receipts (after refunds) rose 11.39% against the projected growth of 12.4% in the revised estimates, while PIT collections grew only 0.03% against the estimated 6.2% growth for FY26. Direct tax collections before refunds grew 4.03% to Rs 28.11 lakh crore. Refunds declined 1.09% to Rs 4.71 lakh crore.

Jayesh Sanghvi, tax partner, EY India, said non-corporate tax collections were expected to be impacted by the rate reductions in the new personal income tax regime announced in the Budget. "Healthy corporate tax growth and effective refund management have helped the overall growth reach 5.12%. The healthy corporate tax collections augur well despite disruptions from global conflicts and supply chain issues. Hopefully, this resilience will reflect positively in the coming times," he said.

As per experts, the tepid performance is primarily due to substantial tax relief measures under the new tax regime, including enhanced rebates that have effectively made annual incomes up to Rs 12 lakh (or up to Rs 12.75 lakh for salaried individuals with standard deduction) completely tax-free. FE

'SEBI to issue advisory on Mythos risks'

Mumbai: Amid concerns around Anthropic's AI model Mythos, Securities and Exchange Board of India (SEBI) Chair Tuhin Kanta Pandey Monday said it will soon issue an advisory to market participants outlining how they should stay alert to vulnerabilities and play a proactive role in mitigation.

He said the regulator was engaging with all stakeholders cautioning them of the risks posed by Mythos. SEBI, he said, is in constant touch with market participants and relevant stakeholders as the challenge after Mythos and similar AI models will "test our resilience". He was speaking at the IMC capital markets conference.

"As you know, Mythos is only available to a very few entities, it's not widely available, but nevertheless, it presents grave risks," he observed. He added that it's important for market players to use whatever tools they have to proactively find vulnerabilities themselves and patch them.

"Technology may be misused. Algorithms may move faster than human controls. Digital platforms may become channels for fraud," he said, adding that while AI tools can identify weaknesses faster, they can also exploit vulnerabilities at speed and scale. FE

BRIEFLY

Manufacturing PMI sees mild recovery in Apr

New Delhi: The country's manufacturing sector activity witnessed mild recoveries in growth of new business intakes and production, but rates of increase were the second-weakest in nearly four years.
The seasonally adjusted HSBC India Manufacturing Purchasing Managers' Index (PMI) rose from 53.9 in March to 54.7 in April.
The two largest sub-components of the Purchasing Managers' Index, new orders and output, rose since March but trailed readings seen in at least three-and-a-half years. PTI

UBS cuts India FY27 growth forecast to 6.2%

New Delhi: Swiss investment bank UBS on Monday cut its gross domestic product growth forecast for India by 50 bps to 6.2% for FY27. The investment bank warned that the growth could fall to 5-5.5% in case of an "extended energy shock scenario" which sees the price of the country's crude oil basket rising to around $150 per barrel. A quick de-escalation in West Asia with the Indian basket averaging $85/bbl and flows resuming via the Strait of Hormuz over the June quarter could mean a growth rate of 6.5%. ENS

'BLUE-CHIP COMPANIES ARE USING FORMULA ONE AS A LAUNCHPAD AND SPOTLIGHT FOR THEIR OWN AI PRODUCTS, RE-BRANDINGS'

As Formula One evolves, AI becomes part of race

Reuters
London, May 4

ARTIFICIAL INTELLIGENCE'S (AI) integration into Liberty Media-owned Formula One and its 11 teams has been noticeable on- and off-track in the already highly tech-powered sport.

Eight new AI partnerships were signed in the past six months alone, according to research firm Ampere Analysis.

Among them, nine-time constructors' champion Atlassian Williams F1 team are partnering with AI company Anthropic for its Claude model to support team operations and race strategy. "It's much more than a sticker on a car or a sticker in a billboard," Williams' Board Advisor Peter Kenyon told *Reuters*. "We see it as one of our differentiating points: how can this partner help us in that journey back to the top?"

Whereas F1 cars in yesteryear had a plethora of brands with tobacco companies at the centre, now partnerships often centre on AI and tech companies helping the teams understand datasets, while benefiting from great exposure.

"What Anthropic and our tech team are doing are understanding the opportunities and then integrating those into our business to be able to demonstrate for ourselves and them, and showcase their technology in the pursuit of getting Williams back to the top," Kenyon added. AI can be a key tool enabling teams to navigate new regulations and new cost cap rules, now set at $215 million.

"Efficiency is one of the ubiquitous benefits of AI products,

Last season, technology led the top 10 spending categories for F1 teams. REUTERS

meaning a natural synergy between teams and AI brands," said Adam Lewis, a senior analyst from Ampere Analysis.

Technology led the top 10 spending categories for F1 teams, reaching an estimated $769 million last season, up 41% from the previous year, according to intelligence platform SponsorUnited.

AI and machine learning brands account for four of the top 15 new sponsorship investors, a SponsorUnited report also showed, including $65 billion-valued cloud infrastructure company CoreWeave, which has a partnership with the Aston Martin F1 team.

AI has been innovative in sifting through administrative tasks and interpreting key rules within sporting and technical regulations, helping engineers take swifter decisions during on-track situations which were impossible decades ago. "So it's gone from a sort of basic AI to more of an agentic approach where rather than just searching for something, it's actually providing decisions for us," Jack Harington, the group partnership lead for Oracle Red Bull Racing, told *Reuters*. The Red Bull outfit, which four-time champion Max Verstappen races for, has a partnership with $494 billion-valued software company Oracle, and has embedded its technological nous across the team.

Technology firms like Alphabet-owned Google are also seeing positives from entering the F1 arena.

"These blue-chip companies are using Formula One as a launchpad and spotlight for their own AI products or re-brandings," Lewis said, noting Google's partnership with F1's McLaren shifted to Google Gemini, a generative AI tool, from Google Pixel.

MARKETS

Sensex	NIFTY	Gold ▼	US Dollar ▲
77,269.40	24,119.30	₹1,52,800	₹95.08
355.90	121.75	Silver ▲	Oil ▲
0.46%	0.51%	₹2,49,000	$118.70

NOTE: GOLD, SILVER RATES AS PER ALL INDIA SARAFA ASSOCIATION DATA
GOLD PER 10G, SILVER PER 1 KG; CRUDE OIL (INDIAN BASKET) AS OF APRIL 30, 2026

DELHI
businessline.
TUESDAY - MAY 5 - 2026

the hindu businessline.
TUESDAY - MAY 5, 2026

Power shift

BJP's advance contrasts with fall of Opposition's bastions

The results of five State Assembly elections mark a reset of India's political field. The BJP has scaled its footprint through expansion in both territory and structure. In contrast, the Opposition's federal coalition has contracted. The setbacks suffered by Mamata Banerjee in West Bengal and MK Stalin in Tamil Nadu, the Opposition's most influential regional anchors, underscores this widening asymmetry. That said, the polls also signal a vote for change in a more familiar 'anti-incumbency' sort of way — in Kerala, Tamil Nadu and West Bengal.

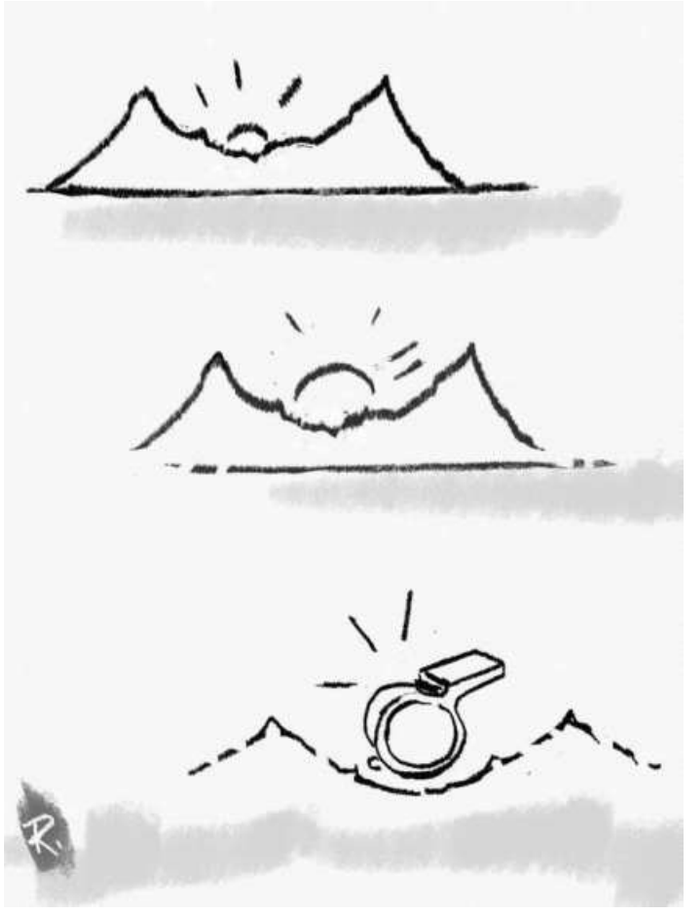
The BJP's West Bengal win represents a watershed moment in Indian federalism. In bringing down Trinamool Congress, which ruled for 15 years, it has once again revealed itself as a ruthlessly efficient election machine. The BJP has won a categorical mandate, amid persistent contestation over process. Home Minister Amit Shah was in relentless campaign mode, having camped in the State for weeks to micromanage booth-level operations and oversee the deployment of over 2.4 lakh personnel of Central armed police forces. Critics and the TMC would frame such a win as a product of systemic disenfranchisement, through SIR that saw the deletion of nearly 10 per cent of the electorate. Yet the BJP's advance suggests a political realignment that goes beyond these factors.

If Bengal represents rupture, Tamil Nadu signals reinvention. After decades defined by the alternating dominance of the Dravida Munnetra Kazhagam (DMK) and the All India Anna Dravida Munnetra Kazhagam (AIADMK), the emergence of Tamilaga Vettri Kazhagam (TVK) led by C Joseph Vijay has unsettled entrenched alignments. A familiar discontent with family-rule, with Stalin having lost his own seat, seems to have played a role in Vijay's win — apart from a young population rooting for a fresh face and 'change'. Whether Vijay sustains an independent course, carves out a new political grammar, or is eventually drawn into a wider national alignment remains to be seen.

In contrast, Assam reflects consolidation of a more familiar kind. Under Himanta Biswa Sarma, the BJP has secured a third term with a two-thirds majority. The Congress' shoddy show once again shows up its inability to take on BJP in most regions outside of south India. Kerala, however, offers the Congress some solace. If the Congress-led UDF has won, it is only at the expense of the Left Democratic Front — signalling the utter decimation of the Left across India for perhaps the first time since Independence. In Kerala too, the BJP edged forward, winning three seats, indicating a minor but deliberate expansion into new terrain. In Puducherry, the BJP-led NDA is poised to return to office, reinforcing a broader pattern: consolidation where it governs, expansion where it does not. Without the political imagination, energy, leadership and organisational muscle to match the BJP machine, the Opposition risks sliding from one defeat to another. It needs to collectively introspect on its tactics, strategy and cohesiveness.

POCKET

RAVIKANTH



An agenda for risk mitigation

CURRENT CONCERNS. India should reduce vulnerability to FPI, by reducing CAD and securing stable means of financing it

ASHIMA GOYAL

In the last column I had analysed why the impact of oil shocks may not be as large as markets seem to be pricing in. But there are other reasons why markets tend to overestimate risks for India.

DIVERSITY AS RISK MITIGATION

There is a belief that India has missed the AI bus, with investors preferring to go to countries in the race. But quite a few Indian AI applications have been highlighted recently. In past tech-led booms the major gains have come from applications. Small language models (SLMs) distilled from large ones and trained on more relevant data are cheaper to run.

Productivity gains of 30 per cent are feasible and will raise incomes and demand. Software companies will play a large part in adapting and applying such SLMs and in other customisations.

Household participation in equity markets has risen and the current volatility is thought to be endangering both household participation and their savings. But the equity and mutual fund share of household financial savings is still only 15 per cent, and physical assets dominate household net worth giving them a good mix of assets.

Equity is not bought from leveraged funds, so there is no pressure to sell when markets are down. Having been through several cycles, households know better than to do so. Their mutual fund SIPs are sustaining. Households, and those who invest for them, believe in the India growth story and understand how to buy in dips. The large derivative trade is predominantly through regulated institutions who understand the risks.

In a $3.92-billion economy even a small percentage of GDP coming into stock markets is large in absolute amounts. In 2025 domestic equity ownership has overtaken that of FPI, which, at about 15 per cent, is at a 20-year low. Comparatively, in the US 18 per cent of domestic equity is held by foreigners. In China it is 3-5 per cent. India will do well to keep this number low. More domestic participation will reduce dependence on FPI and increase returns on household savings. It has already reduced volatility of stock market indices, which kept rising through the Ukraine conflict and have only shed some gains now after more than a year of external shocks and FPI exit.

SAVINGS PATH. Gross domestic savings remain above 30 per cent GETTY IMAGES

Indian private investment, domestic savings and consumption demand are all criticised as inadequate. But investment ratios of above 30 per cent are the 5th highest in the world and only behind China's 40 per cent among large economies. This is mostly private since public investment to GDP ratio is only 4 per cent.

The unorganised sector is enumerated as part of the household sector in India. This sector is borrowing and investing. Household net financial savings to GDP ratio fell, therefore, but the savings in physical assets ratio rose. Gross domestic savings remain above 30 per cent since corporate savings are rising. In the past, savings ratios have risen with growth. The current account deficit, a measure of foreign savings used, remains low at about 1 per cent.

The demand response to the GST tax cut last year has shown corporates that there is demand in India at appropriate prices and the government has tools as well as intention to moderate external shocks. Corporate investment has also picked up as manufacturing is set to benefit from free trade agreements (FTAs), green substitutions, demand for defence exports and construction. Agriculture and service exports add to Indian diversity. Even so, India's consumption/GDP percentage of about 60 makes it less dependent on exports as a source of demand, compared to China where it is about 40.

International institutions have shrugged off their responsibility of maintaining global financial stability and do their best to convince EMs that volatility is due to something 'structurally' wrong with them

GLOBAL SHOCKS

It is strange that there is no onus on the international financial architecture to reduce the volatility emerging markets (EMs) face from global events. Maintaining stability of the international financial system is the mandate of international institutions. But they have shrugged off responsibility and do their best to convince EMs that volatility is due to something 'structurally' wrong with them.

Believers in free markets continue to advise EMs to reduce reserve accumulation and intervention: Currencies should float even if they tend to overshoot. Markets themselves like reserve accumulation, but not the reverse. Practical central bankers, however, know multiple instruments, including buffers, have to be used to manage external shocks and persistent misalignment. Diverse actions reduce risk!

Reserves fell only in six out of 30 years when outflows reduced the capital account surplus to below the CAD. The last 2 Trump-regime volatility years are included in the six. Why shouldn't reserves accumulated in so many surplus years be used to moderate depreciation in the few years of outflows?

Strategically, intervention is avoided at the onset of outflows so they take a loss. In 2025, however, the rupee was allowed to over-depreciate in the hope that it would help solve balance of payments pressures. The rupee depreciated with the dollar although other currencies were appreciating, yet this did not improve either CAD or inflows. The 40 country real exchange rate (REER) depreciated 10 per cent over its long-run equilibrium level to which it has always returned after past outflow episodes. In theory real depreciation should encourage exports and discourage imports. But Indian exports largely go to competitive markets where currency gains have to be shared, while there is immediate full price increase in commodity imports.

A falling nominal exchange rate discourages foreign inflows, since they expect the fall to continue. They prefer coming in only when they are confident a reversal has set in. Benefits from rupee reversal outweigh those from higher interest rates or lower hedging costs.

After the Middle-East conflict long dollar positions increased in the belief the rupee would continue to depreciate, although it was already over-depreciated. Measures are required to arrest what can become a self-fulfilling cycle.

More nominal depreciation is unlikely to deliver real depreciation since it would only further raise the price of oil imports and inflation, which causes the real appreciation. It is better if the 100 REER value is reached through nominal appreciation than through inflation.

India does need to reduce its trade deficit but a competitive real exchange rate can only be one component of its strategy. Others include trade diversification in products, sources and destinations, more FTAs, a big push for green energy and reduction in logistics costs. The Middle-East conflict will give a boost to all of these. Already net oil imports/GDP has trended down from 8.5 per cent to 5.5 per cent. Oil exporters should worry.

India also needs to reduce its vulnerability to FPI volatility by reducing the CAD and increasing the more stable means of financing it. The stock of FDI to GDP in the US was about 20 per cent in 2024, in China it averaged 21.6 since 2005; in 2024 had fallen to 19.3. India's 14 per cent value can be increased towards 20 per cent by allowing more Chinese FDI.

Analysts and rating agencies who focus only on broad averages and past vulnerabilities miss the many sources of change and resilience. Post-pandemic outcomes, therefore, have tended to outperform expectations.

The writer is Professor Emeritus, IGIDR

SEBI's proposed broker rules will boost resilience

As the market moves to quick settlement cycles and fund transfers, the regulatory focus is shifting to risk management

P Saravanan
A Paul Williams

The Indian brokerage industry is currently navigating its most significant regulatory transformation in a decade. On April 24, the Securities and Exchange Board of India (SEBI) released a landmark consultation paper proposing a comprehensive overhaul of the Variable Net Worth (VNW) requirements for stockbrokers.

This move marks a decisive shift from a formulaic, one-size-fits-all capital requirement to a sophisticated risk-based supervisory framework that aligns with the evolving market's microstructure.

A MULTIDIMENSIONAL APPROACH

The core of SEBI's proposal involves replacing the archaic metric of 10 per cent of the average daily client cash balances with a more robust aggregate requirement based on three distinct risk pillars. Under this new framework, brokers must maintain 10 per cent of the average credit balance of all clients over the previous six months, a calculation that holds true regardless of whether those funds are held at the broker level or have been transferred to Clearing Corporations.

Beyond fund exposure, the regulator introduced a slab-based requirement directly linked to the scale of a broker's active client base. For instance, entities managing between 10,000 and 50,000 clients would be required to maintain an additional ₹50 lakh in net worth, with incremental increases for every subsequent 50,000 clients. Finally, the proposal addresses the operational risks inherent in franchise models by mandating additional capital for clients onboarded through Authorized Persons (APs), with requirements ranging from ₹5 lakh to ₹50 lakh, based on the breadth of the AP network.

Why the overhaul is necessary: This regulatory pivot was primarily catalysed by the successful implementation of an Upstreaming Mechanism. Current norms require brokers to transfer client funds to Clearing Corporations (CCs) by the end of each day, a practice that has significantly enhanced the safety of client assets but rendered the old VNW formula essentially obsolete.

While market margins protect against price volatility, robust net worth is essential to absorb residual risks, such as systemic technological glitches, cyber-attacks, or large-scale operational failures. In an era dominated by high-frequency trading and massive retail participation, the number of active clients has become a more accurate proxy for risk than stagnant cash balances.

MARKETS. Managing risks/ISTOCKPHOTO

The impact of this proposal is likely to lead to a significant re-stratification of the industry. For major discount brokers and large institutional players, net worth requirements will increase significantly because of their massive client base. However, because most top-tier brokers already maintain capital levels well above the regulatory minimums, their primary challenge will be to optimise capital allocation rather than seeking fresh infusions of capital.

The situation is markedly different for small and mid-sized regional brokers operating on thinner margins. These entities may find the new slab-based requirements financially taxing, which could trigger a wave of industry consolidation. We may see smaller players merging or transitioning into sub-broker roles under larger entities to bypass steep capital overheads.

However, for the end investor, this transition represents a substantial increase in protection. By linking capital to the number of accounts a broker handles, the regulator ensures that a larger financial cushion is available to facilitate the smooth resolution or transfer of accounts in the event of a systemic crisis.

The SEBI invited public comments on this proposal until May 15, after which a phased implementation timeline is expected to help smaller firms shore up their balance sheets. The long-term trajectory indicates that India is moving toward the global standards of Risk-Based Capital (RBC).

As the market continues to evolve with T+0 settlement cycles and instantaneous fund transfers, the regulatory focus is shifting from "where the money is" to "how much risk is being managed". This proposal is not merely a technical adjustment; it is a fundamental re-rating of the Indian brokerage sector. As regulators tighten these requirements, the industry must prepare for an era that is more capital-intensive, technologically resilient, and ultimately more secure for all market participants.

Saravanan is a professor of finance and accounting at IIM Tiruchirappalli and Williams is the Head of India at Sernova Financial

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.

TVK's massive triumph

The fledgling political party Tamilaga Vetri Kazhagam (TVK), led by actor Vijay, has rewritten the political script of Tamil Nadu. In just two years since its inception, the party has shattered the entrenched dominance of the Dravidian majors by emerging as the single largest party in the State Assembly.

Defying the projections of most pollsters, TVK has registered a sweeping performance across regions, most notably in Chennai, where it decisively outclassed the DMK in nearly all constituencies. This extraordinary mandate reflects not merely Vijay's charismatic appeal, but a deeper, simmering disenchantment among voters with decades of alternating rule by the Dravidian parties.

TVK's win is a mandate for corruption-free government. It should also make the established parties introspect and reform.

M Jeyaram
Sholavandan (TN)

Vijay's challenge

For the first time in the history of TN, both the DMK and AIADMK have been routed and people have mandated TVK to rule. Getting majority and winning in the first attempt is a reflection of the people's disaffection against established parties and a yearning for change. People have reposed huge confidence on TVK and its leader.

The State currently lagging behind in many fields with huge financial debt burden. Progress on civic infra and health needs huge push. Vijay must be shrewd enough in positioning right people at right place in the ministerial set up. For Vijay real challenge of meeting the public's expectation starts now.

RV Baskaran
Pune

Doubtful deal

Apropos 'Costly Remedy' (May 4).

The Sun-Organon saga illuminates a troubling paradox in pharmaceutical commerce.

When a company's patent portfolio deteriorates while regulatory scrutiny intensifies, desperation begets questionable strategy.

Sun-Organon's pivot toward shifting revenue streams suggests institutional confusion about sustainable competitive positioning rather than genuine innovation.

The Trump administration's concerns about intellectual property exploitation deserve serious examination. Yet the larger question persists: should market forces alone determine whether a struggling firm survives?

Sun-Organon cannot simultaneously claim innovative legitimacy while relying on regulatory loopholes and geographic arbitrage.

Either the company possesses substantive scientific merit or it does not.

Ambiguity serves neither investors, consumers, nor the credibility of America's pharmaceutical sector.

K Chidanand Kumar
Bengaluru

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A ND-NDE

Need to recalibrate CSR

Corporate charity risks becoming closed-loop system

M Muneer

CSR PROJECTS. Beginning to resemble commercial ventures

Somewhere between 2013 and now, in the labyrinth of policymaking, a good idea took a very Indian detour. The idea was elegant: if companies grow, society should grow with them. Thus arrived the 2 per cent CSR mandate — a polite instruction that companies above a certain size must spend a slice of profits on social good. A moral spreadsheet, with a conscience column. Like most noble ideas in India, it was swiftly upgraded into a business model.

Before the CSR Act, corporate philanthropy largely flowed outward towards independent NGOs, sectoral foundations, and community organisations. The number of large corporates running their own foundations was limited, and partnerships with external NGOs were the norm. Today, estimates suggest that 60-70 per cent of CSR spending by large listed companies is routed through their own trusts, foundations, or implementing agencies. Thousands of corporate foundations have been created in the last decade alone.

FLEXIBLE ACCOUNTABILITY

Structurally, when the same entity controls the purse, the project and the press release, accountability becomes a flexible concept. CSR, in many cases, has become less about redistribution and more about reclassification.

The numbers tell a charming story. CSR spending has ballooned past ₹25,000 crore, yet the slice reaching independent NGOs keeps shrinking. The money has just found its way into large, photogenic projects and corporate-run foundations, where costs of execution run higher.

And then comes the regulatory subplot. While corporations have mastered the art of recycling CSR funds within controlled ecosystems, independent NGOs and individual donors find themselves in an increasingly intricate maze. Compliance requirements have tightened. Reporting standards have multiplied. Foreign funding regulations have grown stricter. Individual giving incentives under provisions like Section 80G have become more procedural and less attractive in practice.

The message, intentional or otherwise, is oddly asymmetrical: large corporations may innovate with their interpretation of social good, but smaller actors must comply with it in triplicate.

Government has adopted a curious philosophy — trust the balance sheet, scrutinise the volunteer.

Worse, some CSR-funded projects begin to resemble commercial ventures with philanthropic branding. Hospitals built under CSR operate on premium pricing models. Educational institutions charge fees that exclude the very communities they were meant to serve. It's a bit like donating a swimming pool to a village and then charging entry fees.

The CSR mandate, in spirit, remains one of the most progressive ideas in corporate governance. But its execution needs recalibration with intent and courage. First, introduce a mandatory allocation norm within CSR — say, at least 30-40 per cent of CSR funds must be deployed through independent, third-party NGOs. Not affiliated, not controlled, not conveniently connected to any corporation. This would restore balance and better use of funds.

Second, enforce transparency with teeth. Corporate foundations should disclose not just spending, but outcomes, beneficiary profiles, and pricing structures assessed by independent agencies. If a CSR-funded hospital charges market rates, it should not be marketed as social inclusion, and licence must be cancelled.

Third, simplify and incentivise individual giving. Reinstate stronger tax benefits, reduce compliance friction, and create digital public infrastructure for verified NGO donations. If UPI can move billions seamlessly, so can philanthropy.

Fourth, rationalise regulation across the board. Apply consistent scrutiny to all actors — corporate, individual, and institutional. Regulation should be risk-based, not size-biased.

Fifth, protect and enable grassroots NGOs.

The writer is a Fortune-500 advisor, start-up investor and co-founder of the non-profit Medici Institute for Innovation

How India's politicians invest

MARKET EXPOSURE. In the 5 States that went to the polls, a mere 1% of their total assets disclosed sits in capital markets

BALAJI VAIDYANATH
KRISH JAIN
RONAK SINGHVI

Before every State election, candidates in India must file a sworn declaration of their assets with the Election Commission. It is a remarkable document, a public, legally binding account of what each person owns. We went through 7,325 of them, from candidates who contested the elections in Assam, Keralam, Puducherry, Tamil Nadu, and West Bengal.

₹289.4 crore. That is how much of the ₹29,032 crore in total disclosed assets sits in India's regulated capital markets. The rest, 99 per cent of it, is in land, buildings, jewellery, bank deposits, and cash.

Land comes first. Everywhere. Across all five States, real estate accounts for 55-67 per cent of everything disclosed. Keralam still has 67 per cent of its candidates' disclosed assets sitting in immovable property.

What's left over tells its own story. Jewellery accounts for 28 per cent of movable assets in Keralam and 35 per cent in Puducherry. Bank deposits dominate in Assam. Just 461 of the 7,325 candidates, fewer than one in sixteen, have disclosed anything at all in a mutual fund, listed equities, ETF, index fund, PMS, REITs, INVITs, or US equities. The other 6,864 have nothing in any of those categories.

Tamil Nadu alone accounts for ₹149.9 crore of the ₹289.4 crore total, more than the other four States combined. Its mutual fund disclosures (₹89.7 crore, 88 candidates) and listed equity disclosures (₹59.4 crore, 108 candidates) both dwarf the numbers from any other state. Tamil Nadu is also the only State where US equities appear at all.

West Bengal and Keralam together add ₹112.1 crore. Assam leans towards mutual funds; Keralam does the opposite, preferring direct equity. Puducherry, with the highest average disclosed assets of the five States, contributes just ₹2.4 crore in public market instruments.

INSTRUMENT BREAKDOWN

Mutual funds and listed equity dominate across all five States, with 304 candidates disclosing ₹147.2 crore in mutual funds and 240 disclosing ₹134.4 crore in listed shares. Tamil Nadu accounts for the bulk of both. ETFs and index funds have been disclosed by 39 candidates (₹2.3 crore). PMS appears in two Keralam affidavits (₹3.8 crore). REITs and INVITs in two (₹1.6 crore). US equities in four, all Tamil Nadu (₹10.8 lakh). These are not large numbers. The point is that they exist.

The headline numbers aside, four specific disclosures are worth singling out.

Four candidates, all from Tamil Nadu, have declared holdings in US equities, Dr M Sudhakar (TVK, Katpadi), Dr Sathish Christopher (TVK, Radhapuram), Mohammed Safi A (Independent, Panruti), and Vignesh Nandagopal (Independent, Madhuravoyal). Combined value: approximately ₹10.8 lakh. Small in absolute terms; notable in that it exists at all.

Only ₹289.4 crore of the ₹29,032 crore in total disclosed assets sits in India's regulated capital markets. The rest, 99 per cent of it, is in land, buildings, jewellery, bank deposits, and cash

Portfolio Management Services, which require a minimum ticket of ₹50 lakh, show up in two filings. Both are from Keralam: Adv. Gireesh Neyyar (BJP, Parassala) and Moses Henry Motha (AAP, Ernakulam), with a combined disclosed value of ₹3.8 crore.

REITs and INVITs appear in two affidavits. Rohit Sing (Guddu) of the (INC, Dabgram-Fulbari), disclosed approximately ₹1.6 crore. Dr Shyam Krishnasamy (PT, Tirunelveli), disclosed approximately ₹20,000.

Krishna Kalyani (AITC, Raiganj) — his affidavit includes ₹1.76 lakh in Bitcoin. In a dataset of 7,343 filings, he is the only person with a crypto wallet.

PARTY PATTERNS

AITC leads on the share of party assets allocated to public markets at 4.6 per cent, with 40 of its 170 candidates (24 per cent) disclosing ₹43.2 crore. BJP leads on absolute value, 80 of 378 candidates have disclosed ₹52.9 crore. INC, with 384 candidates, shows 16 per cent participation and ₹23.4 crore, just 1 per cent of the party's total disclosed assets. CPI(M) and DMK both show single-digit participation rates with negligible amounts.

Assets overview by State

State	Candidates	Total assets (₹ crore)	Invested in public markets (₹ crore)	% of candidates invested (Count)
Assam	717	2,436	25.0	12.8% (92)
Kerala	862	2,350	47.1	7.4% (64)
Puducherry	290	2,081	2.4	5.9% (17)
Tamil Nadu	3,983	20,135	149.9	4.1% (164)
West Bengal	1,473	2,031	65.1	8.4% (124)
All States	7,325	29,032	289.4	6.3% (461)

Declared liabilities not deducted. Source: Myneta.info; affidavit.eci.gov.in

A GLOBAL COMPARISON

For context, consider the 2024 annual financial disclosures filed by four members of the US Congress, Nancy Pelosi (Democrat, House) disclosed between 53 per cent and 60 per cent of her total assets in public market instruments. Ron Wyden (Democrat, Senate) disclosed between 64 per cent and 73 per cent. Ron Johnson (Republican, Senate), whose entire market portfolio is two index ETFs, disclosed between 27 per cent and 28 per cent. Ted Cruz (Republican, Senate) disclosed between 80 per cent and 87 per cent. The comparable figure for 7,343 Indian election candidates across five States: 0.97 per cent.

A NOTE ON INTERPRETATION

How candidates label their holdings is their own call. The ECI sets no standard for classifying a holding as a public market instrument. Our categorisation is based on how we read what candidates wrote.

The valuation rules are specific but unverifiable. Listed shares are to be disclosed at current market value; non-listed at book value. Whether candidates actually followed this cannot be confirmed from the data.

The affidavit is not a complete picture. It covers the candidate, spouse, HUF, and named dependants. Holdings routed through other family members or companies the candidate does not directly own are not captured.

Put simply: 461 candidates, ₹289.4 crore, 1 per cent of total disclosed assets. Most of their wealth is in immovable property. India has spent the better part of a decade pulling retail investors into its capital markets. SIP accounts have reached 100 million. The political class has, by and large, watched from the sidelines. These 7,325 affidavits describe a cohort sitting on ₹29,032 crore with a near-zero allocation to anything that requires a demat account. If any wealth manager or financial advisor is looking for an underserved segment, they need look no further than India's political class. The pitch writes itself: you have zero exposure to the best wealth-creating opportunity in modern India. Help them diversify.

Vaidyanath is the CIO and CEO of NAFA Asset Managers. Jain and Singhvi are Research Analysts

Euro-zone inflation jump seen as temporary

Mark Schroers
Jana Randow

Euro-zone inflation will jump to 2.7 per cent on average this year but return close to the European Central Bank's 2 per cent target already next year, according to the institution's quarterly survey of professional forecasters.

Respondents revised up their expectations for 2026 significantly — from 1.8 per cent in the previous round — while they see price gains of 2.1 per cent and 2 per cent in 2027 and 2028. At the same time, they forecast slightly slower economic growth than before.

A separate ECB poll — the corporate telephone survey — concluded that the broader pass-through from higher energy costs due to the Iran war "might be more gradual than in the past" but also warned that things could get worse if the fighting isn't over soon.

The data come after the ECB last Thursday kept interest rates unchanged while signalling that an interest-rate increase will be considered at the next meeting. Bundesbank President Joachim Nagel said Friday that such a move will be needed if there's no significant improvement in the outlook for inflation and growth. While some of his colleagues echoed such comments, others struck a more cautious tone, with Greece's Yannis Stournaras saying that a risk of a recession is "real" and Finland's Olli Rehn arguing that there are "no obvious signs" yet of war-induced higher inflation becoming entrenched in the economy through higher wages and prices.

The ECB's analysis is now focused on the risk of so-called indirect and second-round effects — such as a build-up of pressure on salaries and a rise in inflation expectations among consumers and companies.

NO SIGNS YET. Of war-induced higher inflation becoming entrenched REUTERS

The corporate telephone survey said March's advance in oil prices was being transmitted rapidly to selling prices for most oil-dependent goods and services, but it also highlighted that at least large firms tended to be better hedged against fluctuations in energy prices than in 2022, limiting the impact.

If the Middle East war isn't concluded soon, however, "it was likely to induce supply chain disruption, putting significant further upward pressure on prices and curtailing demand," it said. Particular concerns surrounded potential shortages of hydrogen and helium. "Supply disruption could generate inflationary pressure more akin to that witnessed during Covid-19," the survey said, while stressing that there were several mitigating factors such as weaker global demand.

According to the ECB "for most contacts, the principal concern was the impact that the war would have on consumer confidence and therefore final consumer demand." BLOOMBERG

thehindu businessline.

TWENTY YEARS AGO TODAY.

May 5, 2006

Captive power units spell money for big corporates

The grim power availability situation has opened up a revenue source for big corporates. Maruti Udyog Ltd, SAIL, Hindustan Zinc, Gujarat Ambuja, Essar Steel, Tata Steel and Reliance Industries Ltd are among the bevy of companies that have begun selling surplus power from their captive power units, and, in most instances, at competitive rates.

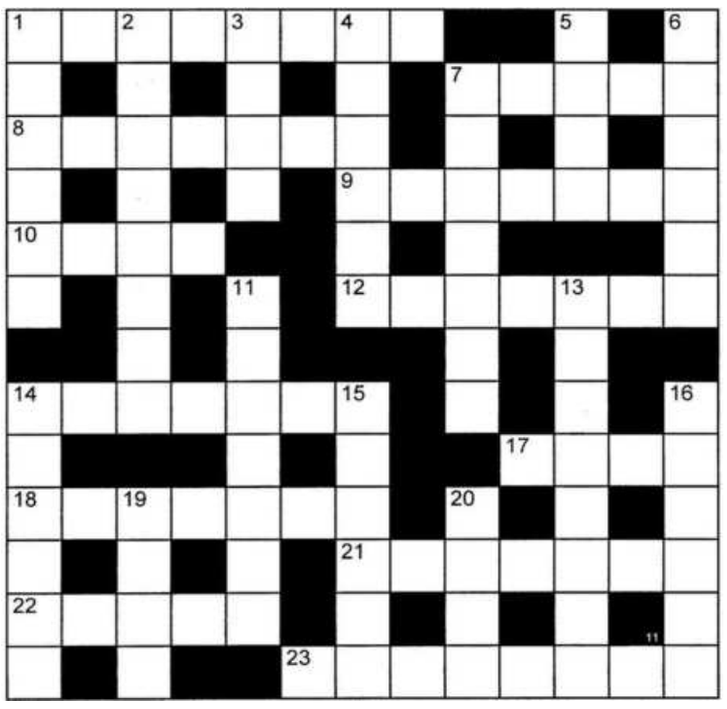
IT cos wake up to work-from-hometown concept

If you thought work-from-home was 'cool,' then you haven't heard of the hot new concept in tech town. Work-from-hometown is a concept that Silicon Valley has experimented and accepted as a best practice, and the good news is that the trend is catching up in India.

DoT demands foolproof verification of mobile users

The Department of Telecom (DoT) has hauled up mobile operators, both GSM and CDMA, for not adhering to stipulated procedures for verifying subscribers before allotting a connection. DoT has said in a letter to the operators that the instructions given by security agencies were not being implemented, leading to difficulties in tracking down subscribers.

BL TWO-WAY CROSSWORD 2672



EASY

ACROSS

1. Mankind collectively (8)
7. Small medicine-bottle (5)
8. A thousand thousand (7)
9. Something to wear (7)
10. Fastening device (4)
12. Language of Britain (7)
14. Postponed, put aside (7)
17. Grape-based drink (4)
18. Former (L) (7)
21. Illness (7)
22. S African antelope (5)
23. One quitting service without permission (8)

DOWN

1. Lowly, modest (6)
2. Smallest particle of substance (8)
3. Corporal of Indian infantry (4)
4. Vibrant feeling (6)
5. Gaming-cubes (4)
6. Hold firmly (6)
7. Model of perfection (7)
11. Allotted, dealt out (7)
13. Brief violent action (8)
14. Follow-on story (6)
15. Hurt, injury (6)
16. Leg-iron (6)
19. Egg-shaped (4)
20. Small chimney (4)

NOT SO EASY

ACROSS

1. The kind feelings one has for mankind in general (8)
7. Bottle or pail might have hydrogen in it (5)
8. A great many at the textile factory take one on (7)
9. Piece of apparel male customer can get arm in (7)
10. It may lower craft to turn the key on it (4)
12. 14-point type of language (7)
14. Was inclined to have it set aside for a while (7)
17. Drink we are about to have at home (4)
18. Former mound a queen initially used (7)
21. Illness one has with mental disorder (7)
22. Antelope from the East must come down to earth (5)
23. He leaves his post if steered around to the right (8)

DOWN

1. Is not proud to be so mean (6)
2. Tunneller might provide clue to particle (8)
3. In Vienna Ike discovered an Indian corporal (4)
4. Let gin give one that thrilling sensation (6)
5. More than one die to cut it into cubes (4)
6. Hold tightly on to different cult going to church (6)
7. Father playing the organ is a model of excellence (7)
11. Was split, having done 'goes into' sums (7)
13. Intend maybe to include the Channel Islands in what happens (8)
14. Follow-up story among those quelled by it (6)
15. Harm done to mother by the years (6)
16. A shackle coming free with an abstainer inside (6)
19. Surrey ground where Valentine got first duck (4)
20. It takes away the smoke from the fuel it breaks up (4)

SOLUTION: BL TWO-WAY CROSSWORD 2671

ACROSS 1. Diatribe 4. Acid 8. Seg 9. Sauce 10. Mir 11. Apricot 12. Onion 13. Decapitated 17. Maple 18. Frigate 20. Ure 21. Twain 22. Van 23. Task 24. Skittles

DOWN 1. Dismay 2. Auger 3. Blunt 5. Compile 6. During 7. Peroration 9. Sacraments 14. Express 15. Amount 16. Tennis 18. Frank 19. Anvil

May the Fourth Be With Bengal, Tamil N, And New Choices

Voters are forcing their way out of status quo, now for BJP and TVK to prove their mettle

Hindsight in the form of final poll results brings 20/20 vision that no punter, pundit or exit pollster can bring. But that doesn't mean that interpreting causes for victory and defeat won't be varied and contested. In the latest season of the latest episodes of assembly polls, West Bengal and Tamil Nadu delivered not just memorably surprising — and surprisingly memorable — verdicts, but also results that will reverberate far beyond their borders. In West Bengal, voters, who were not SIR-ed out, have done what they did 15 yrs back: end status quo, and bring about 'poriborton', or change, by replacing a TMC government that took the electorate for granted the same way the Left Front did till 2011. Mamata Banerjee's TMC, forever brandishing variants of the Sholay line, '*So ja beta, warna BJP aa jayegi*,' has found that people — with protection of central forces — could, and did, opt for an alternative — including defeating Didi in her constituency of Bhabanipur. They have eked out a new choice. With 200+ seats in the 294-member Bengal assembly, BJP will now have to put its proverbial money where its mouth has been since it became the de facto opposition party in 2021, and pitch bringing Bengal out of economic morass and 'law and disorder'.

If Bengal's verdict was historic, Tamil Nadu's was theatrical. Actor Vijay's Tamilaga Vettri Kazhagam (TVK) surged ahead as a 'first-day first show' vox office hit, making it not just a kingmaker as some had predicted, but king. Stunning both DMK and AIADMK, TVK brings an alternative to an old equation for a new aspirational class. The duopoly that has defined Tamil Nadu politics for half a century lies shattered, as does the notion of celebrity popularity never being able to cross over to actual votes. Vijay's rise recalls N T Rama Rao's debut in Andhra Pradesh in the 1980s — cinema charisma transmuted into political capital. Voters, weary of dynastic politics, have embraced a fresh face promising renewal.

Together, these twin verdicts mark a profound reordering of India's political map. BJP's expansion eastward strengthens its national footprint ahead of 2029, while Tamil Nadu's reset introduces a new player capable of reshaping southern alliances. Both results underscore a restless electorate, willing to punish complacency and gamble on new leadership.

Yes, challenges loom. West Bengal's entrenched political violence and welfare populism will test BJP's administrative capacity beyond its political one. On Monday, the Supreme Court refused to entertain a plea to deploy central forces to prevent post-poll violence, asking the approaching party to refer the matter to Calcutta High Court as it was a state matter. Despite a strong message from Union home minister Amit Shah to BJP rank and file not to indulge in post-poll retaliatory violence, there already has been troubling instances of 'badla' (revenge) along with the 'badal' (change). The new dispensation must see to it that it doesn't follow the past, and injects a new political atmosphere — necessary for a new social and economic order — in the state. Meanwhile, Vijay's job in Chennai is to prove to his critics that lack of political experience, which raises questions about governance beyond charisma, is rebutted by a smooth transition.

May 4 will be remembered as the day the 'fish belt' of West Bengal and 'Dravidian-obsessed' Tamil Nadu decided to move beyond their self-imposed gridlocks. With Assam voting for continuation of a BJP government and Kerala 'revolving door' back from CPI(M)-led LDF to Congress-led UDF, voters have rewritten the script in Bengal and TN, highlighting that there will be more verdicts based on performance, for which it will find — if necessary, prise out — credible alternatives.

JUST IN JEST

The seamless pirouette of loyalty from one party to another is a thing to behold

Turn, Turn, Turn, The Seamless Pivot

The art of political pivoting is less skill than a circus act, an acrobatic swivel so seamless, it makes you wonder if people have ball bearings installed in their heels. Till Sunday, a ruling party was hailed as the saviour of democracy, the very embodiment of holding back the forces of flattening. On Monday, after an opposition swept in, the same people pirouette with the grace of a ballerina, declaring the new rulers to be the long-awaited answer to governance and progress.

This is more than your average gymnast's pivot. One moment you're waving the flag of loyalty, the next moment stitching a brand-new banner — also of loyalty, but to a new winning client. The act itself isn't shocking, but the seamless manner in which it is performed is. Yesterday's speeches are quietly deleted, today's endorsements are exclaimed with gusto. No, no matter what the cynics say, such a pivot is not betrayal but adaptation, a Darwinian standard operating procedure to the ever-shifting ecosystem of power. And the audience? They clap, cheer, forget. The pivot is so smooth that the crowd convinces itself that it was *always* meant to be this way. After all, why should consistency matter when the real sport is flexibility? In politics, loyalty is not to ideology or principle, it's to the winning side. This, dear reader, is the highest form of political yoga.

Even as Bengal and Tamil Nadu opt for fresh options, SIR deletions hang in the air for future polls

ALTERNATIVES ROCK

Run With Poriborton

Harsh Goenka

West Bengal once defined India's intellectual and cultural compass. Earlier, when Calcutta was the capital of British India, it was also the nerve centre of commerce and industry. Over the last 5-6 decades, that narrative has slipped. While other states embraced industrialisation, infrastructure and investment, Bengal gradually ceded its position.

One of the most significant reasons for this was the erosion of industrial confidence. After the Left Front came to power in 1977, Bengal saw a decisive shift in its political and economic orientation. Land reforms brought social change and rural empowerment. But the industrial climate grew strained. Militant trade unionism, frequent strikes and an adversarial stance towards private enterprise created deep investment uncertainty. Factories that once symbolised Bengal's economic might began to shut down or relocate. Investors, wary of disruption, chose more stable destinations. Over time, this created a perception that proved difficult to reverse, even as policies evolved.

When TMC came to power in 2011, there was renewed hope that the state would turn the page. The episodes of Singur and Nandigram had already left a deep imprint on investor sentiment. Protests around land acquisition, particularly the exit of the Tata Nano project from Singur, became defining moments. They highlighted the challenge of balancing development with local sensitivities, but also reinforced perceptions of policy uncertainty. For investors, land is often the first hurdle. When acquisition becomes contentious and unpredictable, it raises serious questions about the viability of large-scale projects.

In the years that followed, the government made perfunctory efforts to attract investment through summits and outreach. There were attempts to improve infrastructure and promote sectors such as IT and services. Yet, the pace of industrial revival remained modest. Legacy issues of trust, policy continuity, bureaucratic complexity and lack of ease of doing business continued to weigh on decisions. Even when intentions were positive, execution often fell short, creating a persistent gap between promise and delivery.

Infrastructure has also played a critical role in Bengal's relative stagnation. While cities like Bengaluru, Hyderabad, Pune and Ahmedabad transformed themselves with modern infrastructure, Bengal lagged behind. Kolkata retained its charm, intellectual habitat and culture. But these could not compensate for the absence of world-class logistics, connectivity and urban planning.

Equally important is the Bengali mindset. Bengal has always valued intellect, discourse and cultural refinement. But in a rapidly changing global economy, these must be complemented by risk-taking, innovation and entrepreneurial energy. For generations, there has been a preference for security over risk, for stable employment over enterprise. This has resulted in a slower development of start-up ecosystems, and a relative absence in sectors driving India's new growth story.

The new election mandate is being interpreted as a political verdict. But it's equally an economic verdict, carrying with it three unmistakable messages:

❶ Bengal's people have signalled they are done with dole politics. TMC's governance model, built on welfare schemes, freebies and patronage networks, has run its course in the public imagination. Voters don't want handouts, but hand-holds towards economic opportunity. Any incoming government would do well to recognise it.

❷ The verdict is a cry against the brain drain that has quietly hollowed out Bengal. Some of the finest minds this country produces — engineers, doctors, managers, artists — are leaving Kolkata because it can't employ them. Bengalis are building careers in Bengaluru, Mumbai, Hyderabad and abroad. They would rather build them at home. The electorate has voted for the promise of that possibility.

❸ Bengal cannot grow if it remains internally fractured. Politics of appeasement corrodes trust that economic progress demands. Investors don't come to states where social fault lines are raw and governance appears sectarian. Businesses thrive where rule of law is universal, and every community feels included in the growth compact.

And, yet, it would be a mistake to view Bengal only through the lens of decline.

Boxed populi

Its foundations remain strong. Its educational institutions retain their prestige. Its cultural capital remains unmatched. Its location offers a natural gateway to the northeast and Southeast Asia. Most importantly, its ability to think, question and adapt remains intact.

For Bengal to reclaim its place, there must be a clear and unwavering commitment to industry. Policies must be simple, transparent and time-bound. Investors must feel they are partners in progress. Labour relations must evolve to protect workers, while ensuring enterprise sustainability. Infrastructure investments in roads, ports, logistics and digital connectivity are essential.

Entrepreneurship must be encouraged and celebrated. Governance, above all, must become predictable and transparent. Corruption, bureaucratic delays and arbitrariness remain among the biggest deterrents to growth. Addressing these is foundational.

Bengal's election result signals that its people have chosen to bet on themselves again. That signal must now be met with equal seriousness. Political change opens the door. What walks through it must be policy clarity, economic confidence, social harmony and the will to recover lost ground.

Decades of drift cannot be reversed overnight. But West Bengal has come back from the brink before — from Partition, deindustrialisation, every premature obituary written about it. The ingredients have never left: talent, culture, geography and an inextinguishable desire to matter. What was missing was the moment. That moment may finally be now.

The writer is chairman, RPG Enterprises

What an Election, SIR-Ji

Gilles Verniers

San Francisco: Electoral upsets — like the stunning debut of TVK in Tamil Nadu — and spectacular results — like BJP's victory in West Bengal — have become more frequent in Indian state politics. This time, however, as an electoral analyst and political scientist, I find myself unable to analyse these results as I would normally do.

To be sure, votes have been counted, seats allocated and winners have claimed their mandates. But the results cannot be properly interpreted, due to the mishandling of electoral rolls and conditions under which the special intensive revision (SIR) was conducted.

This is especially the case in West Bengal, where SIR altered the composition of the electorate to such an extent that millions of citizens were deprived of their voting rights, in ways that systematically disadvantaged specific communities, geographies and parties.

To be very clear, there is no direct, incontrovertible evidence that EC designed SIR with the intention of producing an electoral advantage for BJP. What we have is an accumulation of indicative evidence that, in aggregate, is deeply troubling.

SIR was launched at speed, on a timeline that left no room for adequate safeguards, with no justification offered for the sudden necessity of a drastic overhaul after two decades of routine maintenance of electoral rolls. The door-to-door enumeration process penalised migrant workers, seasonal labourers and others who were not at home when officials knocked. In Bengal, deletions were concentrated in opposition strongholds, affecting more Muslim and urban voters, through an undisclosed algorithm that produced mass erroneous deletions among Indian citizens.

The figures are damning. Around 91 lakh voters were removed from West Bengal's electoral roll: 63 lakh marked as absent, shifted, deceased or duplicate; a further 27 lakh deleted due to 'logical discrepancies' — a category created specifically for this state. Of 34.35 lakh appeals filed, only 1,607 names were restored — fewer than 0.05%.

This contrasts with Kerala, where over 98% of flagged voters were restored through a claims process that actually worked.

In Tamil Nadu, the picture is less clear-cut than in West Bengal. Nearly 50 lakh voters were removed from just eight districts falling under the Chennai and Tiruppur clusters, both DMK strongholds. These account for over 50% of total deletions statewide. In Chennai city alone, 35% of registered voters were removed from the list, a deletion rate that cannot be easily explained by administrative inaccuracy. That said, there is no evidence that specific communities or party supporters were targeted.

The question remains: why did the correction mechanism work in Kerala, but not in Tamil Nadu and West Bengal? Why was Assam, the only BJP-governed state among those subject to SIR, exempted from the mass deletion exercise applied to opposition-ruled states, and subjected to a lighter treatment?

The scale across states is impossible to justify on administrative grounds alone. These are not coincidences that democratic institutions can afford to leave unexplained. EC's selective enforcement of the Model Code of Conduct — swift against the opposition, lenient, at best, toward BJP — only deepens the suspicion that the custodian of India's electoral process is no longer independent or impartial.

Electoral analysis — and, indeed, democratic integrity — rests on a foundational assumption: that the electorate that voted is, within tolerable margins, the electorate that was supposed to vote. That assumption has been broken, nowhere more severely than in West Bengal. Any swing calculation, any seat-wise reading, any statement about what the people of Bengal wanted is, at best, incomplete and, at worst, meaningless.

We can count the votes that were cast. We cannot recover the votes that were never allowed to be cast.

The tragedy is that these elections are not meaningless for voters who could have participated in them. Nor for those who did. The upheaval in Tamil Nadu cannot be explained solely by alterations to the electoral roll. Clearly, targeted communal polarisation accounts for much of the BJP's performance in Assam and West Bengal, among other factors.

But EC's interference in these elections has muddied the waters and precludes any clear analysis of how people voted.

This is not a lightly-made statement. So, to be clear, this article is not saying that TMC would necessarily have won the election had SIR not been conducted, or had it been conducted differently. After all, the party chief and chief minister Mamata Banerjee were contending with 15 yrs of incumbency, widespread allegations of corruption, and an economy that has not kept pace with its peers.

What this article points out is that one cannot know what the results would have been without EC's interference with the voter lists, and that this alone is sufficient to cast doubt on the legitimacy of this election.

Legitimacy rests not on results but on the integrity of the process that produced the count. India has held elections for 75 yrs and survived disputed counts, electoral boycotts, and accusations of fraud and manipulation. What it has never faced, at least at this scale, is the systematic reengineering of who gets to participate before a single ballot is cast. Until there is a full, independent accounting of how SIR was conducted, these results will carry an asterisk.

The writer is a political scientist at CERI, Sciences Po Paris

Chappal Phaad Ke, What Cost TMC

Ujjwal Katiyar

On Monday, BJP crossed the majority Lakshman rekha in West Bengal's 294-seat assembly, ending 15 consecutive years of TMC rule. TMC, which had won 213 seats in 2021 and entered the 2026 cycle as front-runner in most pre-election surveys, was reduced to below the majority mark. BJP's victory further can also be seen as the arithmetic consequence of a vote in India that travelled further and was distributed more evenly across the state's geography.

West Bengal's politics has been operating through beneficiary politics — the direct delivery of state resources to identifiable voter blocs as a mechanism of political loyalty. Women emerged as the decisive bloc in 2026, not as a passive recipient group but as the constituency both parties built their campaigns around.

TMC's offer, 'Lakshmir Bhandar', had been delivering ₹1,500 monthly to women-headed households since its launch. BJP's counter was arithmetic rather than institutional: a promise to double the transfer to ₹3,000 a month. The approach of BJP sought to convert existing beneficiaries rather than build a new voter bloc from scratch.

The women's welfare contest ran alongside a sustained BJP narrative on women's safety, anchored in two specific incidents: the rape and murder of a trainee doctor at RG Kar Medical College in August 2024, and the Sandeshkhali protests of the same year. By polling day, these had not receded into background noise. They had entered into ward-level conversations and, ultimately, ballot decisions. The fielding of Ratna Debnath, the victim's mother, from Panihati converted individual grief into direct electoral action.

The governance record TMC carried into the election extended well beyond any single incident. The school recruitment scam, which resulted in the arrest of senior ministers and court-ordered termination of 25,000 appointments, functioned as a referendum on the state's public institutions among the youth and educated middle-class.

BJP framed these not as administrative lapses but as evidence of institutionalised corruption. TMC's own pre-election conduct confirmed the depth of the problem. The replacement of 74 sitting MLAs before the election was an acknowledgement that local resentment had accumulated beyond containment.

BJP's majority can also be explained with the geographical distribution of votes. TMC's support was heavily concentrated in Greater Kolkata, Murshidabad and South 24 Parganas, where BJP also gained votes. In those zones, the party ran up large margins in seats it was already winning. Across the rural interior, border districts and reserved constituencies, its vote was thin and poorly distributed. Winning votes where you are already strong and losing them where contests are decided cost TMC its majority.

Flip, flop

The reserved constituency results sharpened this picture further. West Bengal has 68 SC and 16 ST reserved assembly seats. In 2021, both categories had been reliable TMC territory. In 2026, BJP's gain is concentrated in the tribal belt running through Jangalmahal — forested, underdeveloped region spanning Purulia, Bankura, Jhargram and Paschim Medinipur — and the northern districts.

In the SC-reserved seats, the competition was tighter, but the outcome was equally clear. These are constituencies where TMC had built welfare-based loyalty over years. The rural dimension of this result is worth examining separately. BJP won higher seats classified as highly rural, with gains concentrated in North Bengal and the western Jangalmahal districts, areas where the party had been building organisational presence since 2019.

TMC's calculation had long rested on the consolidation of the state's Muslim electorate, which constitutes about 27% of the population. In 2026, that consolidation held in aggregate but fractured at the margins, which was sufficient to alter the outcomes in several constituencies. In Beldanga and Kandi assemblies of Murshidabad, TMC lost to BJP by a margin of over 10,000 votes, a result that reflected not only the consolidation of Hindu votes, but also the degree to which a section of the Muslim electorate moved away from TMC's umbrella to Congress.

EC's SIR of electoral rolls removed about 91 lakh names from Bengal's voter lists in the months preceding the election. TMC framed the exercise as targeted disenfranchisement. In Muslim-majority constituencies, deletions fractured a voter bloc the party had previously held with greater consolidation.

In the Matua-dominated constituencies of North 24 Parganas and Nadia, which influence nearly 50 assembly seats, SIR deletions had affected tens of thousands of voters. Anxieties generated by those deletions ran alongside BJP's credible commitment to CAA implementation in its final-phase campaign. The Matua community, caught between deletion-related panic and BJP's citizenship promise, directed its political anger at the state machinery rather than the national party.

For India, Bengal 2026 completes the eastern strategy BJP had been pursuing since 2019. TMC's capacity to function as a nucleus of national opposition politics ahead of 2029 is reduced now. Mamata Banerjee's record across three terms remains a political resource. What BJP does in its first term will determine whether 2026 represents a structural shift in Bengal's political alignment or a course correction within a system previously led by TMC.

Scale of the rural sweep, the reserved seat reversal and minority vote fragmentation together suggest something more durable than a single-cycle protest.

The writer is an electoral geographer specialising in geospatial analytics

THE SPEAKING TREE

Paradox of Progress

DHARMEN SHAH

At a recently concluded London Marathon, elite runners once again pushed the boundaries of what was thought humanly impossible over a 42 km distance. Much like Roger Bannister's historic sub-4-min mile in 1954, such moments stand out as milestones in the journey of human endurance and achievement.

We have constantly been on an upward trajectory, albeit gradual, across all spheres of life. In every field that requires human intervention, there has been a dramatic evolution in how we think and act. Take technology, for instance. For those belonging to the Silent Generation and Baby Boomers, the world has virtually turned 180°. Human progress has improved health, longevity and connectivity.

Can this spirit of progress be channelled to make the world more peaceful, equitable and humane? Despite such extraordinary achievements, we find ourselves living in an increasingly fragile and uncertain world.

Does this mean that our growth and development have come at a cost detrimental to our collective well-being? Does it mean that we have mastered speed and scale but are still learning to balance? Have we advanced faster in capability than in wisdom? These questions are worth pondering as we celebrate human accomplishment.

PARANORMAL ACTIVITY
Paragraphs From Fiction

The Merry Adventures of Harshabardhan And Gobardhan

Shibram Chakraborty

'I just got the telegram,' Harshabardhan told his brother. 'They've accepted all our conditions for supplying the timber. Get dressed, we're leaving at once.'

'Where are we going, Dada?' asked Gobardhan.

'Bombay.'

'What for?'

Gobardhan, or Gobra as he was fondly called, looked like the sky had fallen on his head.

'Didn't you hear? The company in Bombay has accepted all our conditions. Let's go and finalise the contract. It's a juicy deal. They've asked me to go at once.'

Harshabardhan was a man of impulses. Gobardhan knew this, but still he stammered, 'How can we go at once, Dada?'

'If not now then when? We don't have much time before the train leaves. The Bombay Mail won't wait for us, will it? We have to leave at once.'

'What about a bath? Dinner?'

'We can bathe on the train. There are fantastic bathrooms. They have showers. As for dinner, there is marvellous food in the dining car….'

…'You don't want to take any luggage at all?'

'Luggage? Just the one piece. You. You are an entire piece of luggage all by yourself.'

Gobardhan was deeply hurt. So was his self-respect. But he couldn't summon a retort. He only grunted.

Translated from Bengali by Arunava Sinha

Chat Room

Macron, Kejriwal, MGR – Or Vijay?

Apropos the news report, 'Dravidian Drive, Vijay Rath Or Mix & Match?' (May 4), the temptation to script Vijay as the next MGR is irresistible in Tamil Nadu's political theatre. Both emerge from cinema with a crafted moral aura: champions of the underdog, embodiments of popular justice. Vijay's TVK begins not with cadre but fandom. The proposition that a mass following can be swiftly repurposed into an electoral machine within months is alluring, even reminiscent of Emmanuel Macron's rapid ascent, and in contrast to MGR who had long been groomed in DMK. Vijay can gainfully pick up the 'don'ts' from Arvind Kejriwal's AAP that, too, reached orbit in one burst — only to be relentlessly in the periscope of the world's biggest party.

R Narayanan
Navi Mumbai

Economy

TUESDAY, MAY 5, 2026

IN THE NEWS

BHEL Q4 NET PROFIT JUMPS TO ₹1,290 CRORE

STATE-OWNED BHEL on Monday posted a two-fold jump in consolidated net profit to ₹1,290.47 crore during the quarter ended March 31, supported by growth in revenues. It had reported a net profit of ₹504.45 crore in the same period a year ago.

CONSUMPTION OF LPG DECLINES 16% IN APRIL

INDIA'S COOKING GAS LPG consumption fell by a steep 16% in April as supply disruptions linked to the West Asia conflict hit availability for both household kitchens and commercial users, according to latest official data. LPG consumption stood at 2.2 million tonnes in April.

Coal supply by CIL arm rises 8.2% in April

COAL INDIA ARM South Eastern Coalfields Ltd (SECL) on Monday said coal supply to the power sector jumped 8.2 per cent to 12.49 million tonne (MT) during April. Coal despatch by SECL stood at 11.54 MT in April last year.

India resumes wheat exports after four years

INDIAN TRADERS HAVE begun exporting wheat for the first time in four years, as ample stocks, higher global prices and firmer freight rates have opened a window for them to make small shipments to buyers in Asia and West Asia, trade sources said.

Govt will turn MP into milk capital of India: CM

THE MADHYA PRADESH government will promote cattle rearers and boost dairy investment to make the state the country's "milk capital", Chief Minister Mohan Yadav said on Monday. AGENCIES

TARGET IS TO COMPLETE NEGOTIATIONS BY YEAR-END

India and Canada begin second round of FTA talks

FE BUREAU
New Delhi, May 4

INDIA AND CANADA on Monday started the second round of discussions on the Comprehensive Economic Partnership Agreement (CEPA) with the target to complete the negotiations by the end of this year. The talks will be held from May 4 to May 8, a senior official said. Through the CEPA both sides are aiming to liberalise bilateral trade and double it to $ 50 billion by 2030. The talks are being held in New Delhi.

Later this month, Commerce and Industry Minister Piyush Goyal will be visiting Canada along with a business delegation. During the ministerial level talks efforts would be made to expedite the negotiations.

The first round of talks on India-Canada CEPA were held from March 9 to March 20. The Terms of Reference of the CEPA were signed on March 2 during the visit of Canadian Prime Minister Mark Carney to India.

Trade agreement with Canada fits with India's strategy of entering into deals with developed countries where complementarities exist and not direct competition.

TRADE TIES

- Piyush Goyal to visit Canada later this month with business delegation
- Efforts will be made to expedite negotiations during ministerial-level talks
- In April-February 2026 India's exports to Canada were up 10.75% to **$4.22 bn**
- During same period, imports fell 27.5% to **$3.08 bn**
- Key exports from India to Canada are drugs &pharmaceuticals, iron & steel, seafood, garments
- Key imports from Canada are pulses, pearls, semiprecious stones, coal, fertiliser, and paper

Goods and services between the two countries stood at $23.66 billion in 2024, with merchandise trade valued at nearly $8.98 billion, and the rest coming from services. In 2024-25 India's goods exports to Canada were up 9.80% to $ 4.22 billion while imports from Canada fell 2.3% to $ 4.44 billion.

In April-February 2026 India's exports to Canada were up 10.75% to $ 4.22 billion while imports fell 27.5% to $ 3.08 billion.

Key exports from India to Canada include drugs and pharmaceuticals, iron & steel, seafood, cotton garments, electronic goods and chemicals among others. Key imports of India from Canada include pulses, pearls and semi-precious stones, coal, fertilizer, paper and petroleum crude.

Key sectors of India's services exports to Canada include telecommunications, computer and information services, and other business services. These sectors hold significant future growth potential and are expected to expand further following the conclusion of the CEPA.

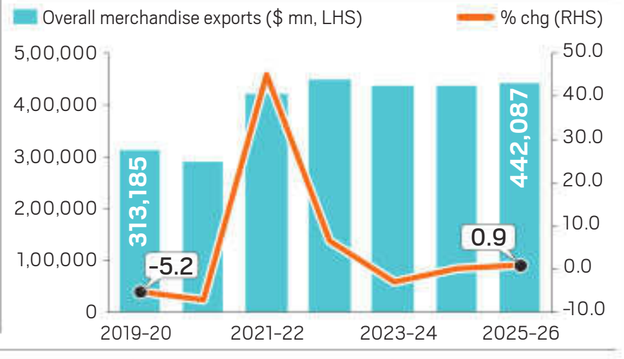
It is the third attempt by India and Canada to negotiate the CEPA. The negotiations on CEPA with Canada were first started in 2010 but could not make much progress. The talks were relaunched in March 2022 but abandoned in August-September of 2023 due to political differences.

Canada is also home to over 425,000 Indian students and a strong Indian community.

Joint Secretary in the Department of Commerce, Brij Mohan Mishra, is the chief negotiator from the Indian side. Bruce Christie is Canada's chief negotiator.

EXPORTS STAGNANT IN RECENT YEARS, REQUIRE POLICY PUSH

WHILE INDIA'S MERCHANDISE export growth has been flat or negative in most of recent years, shipments of labour-intensive items like readymade garments, gems & jewellery have registered sharper declines. Electronic exports stood out with stellar growth rates, thanks to rising shipments of smart phones, but domestic value addition in this import-intensive sector remains low.
—*Saikat Neogi*



Exports ($ mn)	Electronics	% chg	Readymade garments	% chg	Gems & Jewellery	% chg
2019-20	12,905	-	15,476	-	35,851	-
2020-21	12,126	-6.0	12,216	-21.1	25,866	-27.9
2021-22	16,923	39.6	16,032	31.2	39,115	51.2
2022-23	25,274	49.3	16,169	0.9	37,884	-3.1
2023-24	30,969	22.5	14,531	-10.1	32,720	-13.6
2024-25	38,674	24.9	16,018	10.2	29,854	-8.8
2025-26	48,027	24.2	15,780	-1.5	28,219	-5.5

India's LNG basket resets: Qatar, UAE exit April flows

SAURAV ANAND
New Delhi, May 4

INDIA'S LNG SOURCING underwent a sharp reset in April 2026, with Qatar and UAE — key long-term suppliers — dropping out of the import basket. In their place, shipments from Oman, Nigeria and Angola surged, signalling a major realignment triggered by disruptions through the Strait of Hormuz.

According to Kpler data, supplies from Qatar plunged from 1.055 million tonne in January to 765,000 tonne in February and just 60,000 tonne in March, before falling to zero in April — a 100% decline over three months. Similarly, UAE shipments dropped from 403,000 tonne in January to 131,000 tonne in March, and then to zero in April.

As traditional suppliers receded, Oman emerged as the largest LNG source in April at 585,000 tonne, up from 222,000 tonne in January — a rise of over 160%. Nigeria's supplies increased to 482,000 tonne in April from 280,000 tonne in January and 328,000 tonne in March, marking a near 72% increase over the period. Angola contributed 275,000 tonne, maintaining a steady presence.

The US strengthened its position, with shipments rising from 138,000 tonne in January to 339,000 tonne in March.

Petronet to expand LNG storage, diversify sourcing

PETRONET LNG IS fast-tracking plans to expand LNG storage capacity and diversify sourcing as supply disruptions from Qatar — India's largest LNG supplier— continue to impact cargo inflows since early March.

The company plans to scale up infrastructure beyond its existing 10 LNG storage tanks, with proposals to add seven more tanks to strengthen supply resilience. However, officials indicated that new tank construction could take up to three years, while strategic underground storage may require a longer gestation period.

FE BUREAU

No relief on the cards for OMCs: Govt

SAURAV ANAND
New Delhi, May 4

THE CENTRE HAS no proposal to provide financial support to state-run fuel retailers for the losses they incur on sales of diesel, petrol and jet fuel at below market rates, Sujata Sharma, a joint secretary in the petroleum ministry said on Monday.

"The government does not have any proposal that talks about supporting oil marketing companies," Sharma said on May 4, even as state-run oil marketing companies (OMCs) continue to face pressure from elevated crude prices and unchanged retail fuel rates.

According to rating agency icra, OMCs are currently incurring negative marketing margins of around ₹14 per litre on petrol and ₹18 per litre on diesel at prevailing crude prices. The squeeze comes as Brent crude remains around $108 per barrel, while retail prices of petrol and diesel have not been revised since early April 2022.

Direct tax collections rise 5% to ₹23.4 lakh crore in FY26

KULDEEP SINGH
New Delhi, May 4

INDIA'S DIRECT TAX collections after refunds grew at a five-year low of just 5.12% year-on-year in FY26 (provisional figures) and fell short of the revised estimates of ₹24.21 lakh crore by ₹80,594 crore, according to data released by the Central Board of Direct Taxes (CBDT) on Monday. Personal income tax (PIT) collections grew by a mere 0.03% Y-o-Y.

In absolute terms, direct tax collections after refunds stood at ₹23.40 lakh crore, lower than the revised estimate of ₹ 24.21 lakh crore.

Corporate tax collections were ₹10.99 lakh crore against the revised estimate of ₹ 11.09 lakh crore, while non-corporate tax collections stood at ₹11.83 lakh crore against the revised estimate of ₹13.12 lakh crore. Non-corporate taxes include those paid by individuals, HUFs, firms, local authorities, artificial juridical persons, etc.

Corporate tax receipts (after refunds) rose 11.39% against the projected growth of 12.4% in the revised estimates, while PIT collections grew only 0.03% against the estimated 6.2% growth for FY26.

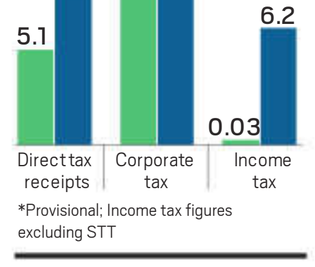
Direct tax collections before refunds grew 4.03% to ₹28.11 lakh crore. Refunds declined 1.09% to ₹4.71 lakh crore.

Jayesh Sanghvi, tax partner, EY India, said non-corporate tax collections were expected to be impacted by the rate reductions in the new personal income tax regime announced in the Budget. "Healthy corporate tax growth and effective refund management have helped the overall growth reach 5.12%. The healthy corporate tax collections augur well despite disruptions from global conflicts and supply chain issues. Hopefully, this resilience will reflect positively in the coming times," he said.

According to experts, the tepid performance is primarily due to substantial tax relief measures under the new tax regime, including enhanced rebates that have effectively made annual incomes up to ₹12 lakh (or up to ₹12.75 lakh for salaried individuals with standard deduction) completely tax-free.

Rohinton Sidhwa, partner, Deloitte India, said year-end tax revenues have been largely flat, recording a mediocre 5% growth. "The securities transaction tax revenues have also grown 8%, reflecting strong buy-sell activity in the stock market," Sidhwa said. Hitesh Sawhney, Partner, Price Waterhouse & Co LLP said that despite softer traction in non-corporate taxes and STT, the robust momentum in corporate tax collections and the broader buoyancy in overall direct tax revenues set a positive tone for the government's fiscal position as FY26 draws to a close.

5-YEAR LOW



KRISHNA SRINIVASAN, DIRECTOR, IMF ASIA AND PACIFIC DEPARTMENT

'Triple whammy risk looms over India'

Energy shocks, tighter financial conditions and a bad monsoon may pose a triple whammy for India, said **Krishna Srinivasan**, *director, International Monetary Fund's Asia and Pacific Department. Rising educated youth unemployment highlights the need for job-rich growth, he tells* **Prasanta Sahu.** *Excerpts:*

Are we heading towards a "lost decade" for some emerging Asian economies, given that they have to bear a disproportionately larger burden of the West Asia war?

It's too early for a rush to judgment. In recent years, Asia has faced a series of shocks—Covid, Ukraine, tariffs, and now the West Asia conflict. Despite concerns, especially given the region's high trade exposure and supply chain integration, Asia has remained resilient. Even after the tariff shock, the region held up well, supported by a strong tech cycle, accommodative macro policies, and easy financial conditions. Tariff cuts—including for India from 50% to 10%—also provided a boost.

However, this latest shock is different. Asia is highly energy-intensive, with energy use averaging about 4% of GDP—twice that of the EU—and relies heavily on imports (around 2.5% of GDP). This makes it more vulnerable.

Under a reference scenario, Asia's growth may slow from 5% to 4.4% this year and 4.2% next year. If energy prices ease by 2027, the region could see a cumulative output loss of about 1% of GDP; if prices stay elevated, losses could reach 2%. Inflation could rise by 1 percentage point in a moderate scenario and up to 4 percentage points in a severe one. Energy-intensive, import-dependent economies like India, the Philippines, and Thailand are likely to be hit harder.

With global liquidity tightening, are emerging Asian markets at risk of sudden capital outflows?

Last year, financial conditions were very supportive for Asia, and the region entered this phase from a position of strength, helped by lower tariffs and supportive macro policies. However, conditions could now tighten. Equity markets have already seen capital outflows, exchange rates have come under pressure, and sovereign yields have risen across many Asian economies, including India, reflecting fiscal concerns. A third downside risk is weather-related—if the monsoon underperforms or there is a strong El Niño event, the situation could worsen further. In that case, the economy could face a "triple whammy." These are the key downside risks that need to be taken into account.

What are the key downside risks you see for the Asian economies in a year?

For example, India's energy intensity is about 5% of GDP, which is quite high. The key downside risk is that if this shock lingers and is not resolved quickly, it could pose a sharp risk to growth in India, much like in other energy-intensive, oil-importing economies. ASEAN countries such as Indonesia, the Philippines, and Thailand would also be hit hard. The duration of the shock is critical. Even if conditions normalise today, there are significant lags before the benefits are felt, so the impact would persist for some time.

What is the worst-case projection for India's GDP growth, given the energy shock, fertiliser crisis and El Niño?

For Asia, growth could fall by 1 percentage point cumulatively through 2027 under an adverse scenario, and by 2 percentage points in a severe scenario (from the baseline of 4.4% this year and 4.2% next year) across the six major G20 Asian economies, including India. Government officials have talked about fiscal strain due to the West Asia conflict. Countries across the region are not allowing prices to play out, providing tax breaks and subsidies. If the crisis continues, it will have a significant bearing on GDP and fiscal space. So far, India has managed it and comes on a stronger footing than many others—macro fundamentals are strong, growth momentum was solid, inflation has been below target, reserves are high, and fiscal policy has been prudent.

UNDER A REFERENCE SCENARIO, ASIA'S GROWTH MAY SLOW FROM 5% TO 4.4% THIS YEAR AND 4.2% NEXT YEAR

It has done well in policy management and overall macro fundamentals. But the shock is significant: India is highly energy-intensive and heavily import-dependent, notably via the Strait of Hormuz, which puts it in a much more difficult position.

Should and how soon India pass on rising costs to retail prices?

Our advice, not just for India but for every country, is to allow price signals to play out, because otherwise demand won't adjust to supply. India cut excise duty on fuel and provides fertilizer subsidies. If prices don't play out, it creates a demand-supply mismatch, leading to bigger problems and higher aggregate prices later. At the same time, some people will be hurt, so support should be targeted to those who really need it.

India is one of the fastest-growing and largest economies by GDP, yet its per capita income remains very low, even below Bangladesh. Isn't this a serious concern?

India's large population means per capita income can be lower than in countries with smaller populations. But aggregate GDP and living standards have risen—the trend is positive. The focus should not be on per capita comparisons, but on achieving higher growth beyond the current 6.5% to 8%+ for Viksit Bharat by 2047.

This requires reforms—greater economic diversification, stronger trade integration within Asia, better implementation of labour laws, improved investment climate, policy predictability, reduced judicial backlogs, and deregulation. These will lift growth and per capita incomes. China is apparently creating hurdles in supply chain relocation to countries like India For India, this is an opportunity to be part of the China+1 strategy. There is no single reform—India has to go full throttle. Vietnam has done very well, attracting investment and integrating faster. India should similarly open up to more FDI and lower trade barriers so firms can import cheaper inputs and stay competitive.

Because of the lack of an AI play, is India losing out significantly and becoming less relevant to investors?

India does reasonably well in AI adoption and preparedness, but the key issue is whether it has the right skills for the next level. India must rethink education, focus on continuous learning, and better align workforce skills with evolving job market needs.

(Read full interview on www.financialexpress.com)

Opinion

TUESDAY, MAY 5, 2026

LEFT STRANDED

Prime Minister Narendra Modi

Today, we are also seeing that there is no state in India where there is a communist party government. This is not just a change in politics but in thinking

Restless mandate

Voters demand change across states; now govts must deliver on growth, jobs, and credibility

INDIA'S LATEST ROUND of Assembly elections delivered a verdict that is both emphatic and uneven—a sweeping rejection of incumbency across key states, tempered by a notable endorsement of continuity in Assam and Puducherry. The larger message is unmistakable: voters are no longer bound by entrenched loyalties or legacy politics. They are impatient, exacting, and willing to disrupt the status quo when governance falls short. Just as importantly, they are beginning to judge political actors less by rhetoric and more by credibility—the ability to deliver on promises, not merely make them. Nowhere is this more evident than in West Bengal. The scale of the Bharatiya Janata Party's (BJP) surge signals not just anti-incumbency, but a decisive collapse of a once-dominant political narrative. Mamata Banerjee's Trinamool Congress had built a formidable model anchored in welfare delivery and charismatic leadership. But fatigue, corruption, nepotism, coupled with creeping thuggishness, and the limits of welfare-led governance, created the conditions for a backlash. Bengal's verdict is not merely a change of guard; it is a repudiation of complacency in a state long seen as resistant to political upheaval.

Tamil Nadu, too, has delivered a disruptive verdict—but through a different route. The rise of Vijay's Tamilaga Vettri Kazhagam breaks the decades-old duopoly of the Dravida Munnetra Kazhagam and the All India Anna Dravida Munnetra Kazhagam. This is more than the entry of a new player; it is a structural rupture. Younger voters, less tethered to ideological legacies, have shown a willingness to back an untested formation that promises sharper governance. Even the most stable political arrangements, it turns out, cannot survive without renewal. Kerala's outcome, while less dramatic, is equally significant. The exit of the Left ends a near five-decade continuum of communist presence in Indian states. This is not just cyclical alternation. Taken together, the verdicts reflect a broad-based yearning for change. Welfare schemes and identity mobilisation are no longer sufficient shields against voter dissatisfaction. The bar has been raised: jobs, growth, and governance credibility now matter more than ever. And yet, Assam offers a counterpoint—the results suggest voters are not reflexively anti-establishment; they are discerning. Where governance is seen as stable, continuity can still command support. Electoral behaviour, increasingly, is performance-linked—not sentiment-driven.

For the BJP, these elections mark a clear recovery. After an indifferent showing in the recent Lok Sabha polls, the party has regained momentum with a string of state-level victories—barring Jharkhand—reaffirming its organisational strength. At the same time, the results expose the fragility of the Indian National Developmental Inclusive Alliance. With key constituents weakened in Bengal and Tamil Nadu, the Opposition appears more fragmented, its ability to mount a cohesive national challenge further diminished. But the real test begins now. Electoral mandates are only provisional endorsements. In West Bengal, the BJP must demonstrate that political alignment with the Centre can translate into investment, jobs, and industrial revival. Tamil Nadu's new dispensation faces a tougher challenge. Rising debt and interest costs have narrowed fiscal space. Balancing welfare commitments with fiscal discipline will require administrative finesse, not just political will. Kerala's constraints are tighter still. High debt, persistent deficits, and heavy committed expenditure leave little room for manoeuvre. Course correction will demand politically difficult choices.

There is also a broader caution. Sharp electoral swings carry the risk of deepening social and political polarisation. Competitive politics must not slide into communal divides that weaken the social fabric. What India needs is not heightened polarisation, but amity, inclusion, and trust—conditions essential for both stability and growth. The deeper lesson is that Indian voters are no longer passive participants; they are arbiters of performance. Mandates are not durable entitlements but conditional contracts. The electorate has delivered disruption. It now expects swift, credible delivery.

Buffett can't bequeath Abel patient investors

PATIENCE MAY BE the greatest virtue, but few professional investors have the privilege of practising it. In real life, money managers live in constant fear that their investors will flee—and their jobs will be toast—if they fail to keep up with their benchmarks for several quarters or, heaven forbid, years. The only living exception is Warren Buffett. And Greg Abel, Buffett's successor as Berkshire Hathaway Inc's new chief executive officer, is already having to come to terms with that reality.

At his first annual meeting as CEO, Abel preached the gospel of investing discipline against a backdrop of the worst stretch of underperformance for Berkshire's stock in a quarter century. The shares have lost 10.8% in the past 12 months, a 40.4 percentage point underperformance to the S&P 500 Index—the worst since March 2000.

And one needn't look far for an explanation: Berkshire reduced its stock holdings by a net $8.1 billion in the first quarter, leaving its cash position at $397 billion, or about 32% of total assets. That's even higher than the pile Buffett accumulated prior to the financial crisis. The conglomerate's main exposure to the buzzy AI theme was Apple, a once massive position that's been swiftly downsized since 2024. Now, Berkshire is effectively clipping coupons while index investors elsewhere profit from a bonanza.

Here's how Abel described the situation (emphasis mine):

One of our greatest strengths at Berkshire is patience and being disciplined when it comes to allocating our capital. There will be opportunities that come over time...and it doesn't mean there's not opportunities now, but *it doesn't mean you need to deploy all your capital or spend all your money right now*. And that's really our approach.

JONATHAN LEVIN
Bloomberg

Among its core principles, Berkshire aims to buy companies that are reasonably valued; that they understand; and for which they can assess the longer-term economic prospects. Every element of the Berkshire process faces obstacles in the age of AI.

If Abel and his Berkshire peers are implying (however subtly) that a correction is coming, and they intend to wait for it, the real question is how long their investors will be willing to wait along with them. In its earlier days, Berkshire was a natural vehicle for individual investors trying to gain access to a diversified portfolio of equities and throw their lot in with a legend. Today, Berkshire shares compete with ultra-low-cost S&P 500 exchange-traded funds, and the legend is stepping back, replaced with Abel, whose expertise is really in business operations rather than investing. The stock was already underperforming when Abel took the reins on January 1, and the famous Buffett premium could durably become an Abel discount if he can't catch up to the market soon.

Although Berkshire has long enjoyed low turnover among investors, I'm sceptical it could prevent an exodus without the returns to sustain enthusiasm. Lengthy periods of major underperformance have been extremely rare in Berkshire's history.

For the Berkshire faithful, the pre-dot com and pre-financial crisis examples, in particular, have become part of the Buffett lore: They showed why the Oracle of Omaha is the greatest investor ever, and why it's worth giving him the benefit of the doubt even when it seems like he's lost a step. But those episodes happened when Buffett was in his prime and faith in his process was near an all-time high. It's hard to imagine investors having the same patience with an untested CEO.

To be clear, I'm not saying Abel is wrong to exercise caution in this still-frothy market. If the stock market crashes and Berkshire swoops in to buy up the gems in the rubble, Abel will be set up to enjoy a long and prosperous career. But no one can know whether a crash is coming, with markets quick to recoup losses these days. And investors aren't going to stand by an unproven operator forever to find out if he'll be vindicated.

REAL POLITICS

HINDUTVA WITH INCLUSIVE MESSAGING PROVES ITS CAPACITY TO CO-OPT CONTESTING REGIONAL ASPIRATIONS

A shift towards nationalism

BADRI NARAYAN
Vice-Chancellor, Tata Institute of Social Sciences

THE RESULTS OF the recent Assembly elections have yielded decisive gains and losses for both national and regional parties that were in the fray. The Bharatiya Janata Party (BJP) secured a win in Assam that reaffirmed its strong position in the state. But more importantly, it registered a historic and unprecedented triumph in West Bengal, even as it marked its political presence in Kerala and Tamil Nadu. A bigger surprise was actor-turned-politician Vijay's party, Tamilaga Vettri Kazhagam (TVK), emerging as the single-largest party in Tamil Nadu in its debut. The Indian National Congress (INC) was almost wiped out in West Bengal and showed a weakened presence in Assam, but it managed to win in Kerala with an impressive majority.

What are the key takeaways from these elections, and how will the results influence national politics? Also, what do the outcomes mean for national parties like the BJP and the Congress, and how should these be interpreted in the context of regional politics in India?

The results in Assam suggest that aggressive Hindutva politics centred on issues such as the infiltration of Bangladeshis and Rohingyas worked favourably for the BJP. In Assam, the way the party's leaders, including Himanta Biswa Sarma, articulated identity politics resonated with the voters. The BJP's development schemes also had a significant impact at the grassroots. The poll results indicate that the "double-engine government" model along with effectively implemented welfare schemes attracted large sections of the population. The Rashtriya Swayamsevak Sangh, which has been active in the region for decades, helped create conditions in which the Hindutva identity could gain political traction. Through its socio-cultural initiatives, particularly in education and health, the Sangh strengthened its grassroots presence. Prime Minister Narendra Modi's campaign and his credibility among the people also contributed significantly to the BJP's return to power for a third term.

The BJP's first-ever victory in West Bengal needs to be understood from multiple perspectives. First, PM Modi's campaign created an alternative appeal to contrast that of the incumbent Mamata Banerjee. The latter's image became associated with allegations of corruption and political violence, whereas the former's image gained trust due to his emphasis on development and welfare schemes for the poor and marginalised along with a more moderate Hindutva appeal. This contributed to the emergence of a new Bhadralok image engineered by Modi for the people of Bengal, replacing Banerjee's version which many perceived to have eroded over time. The PM's slogan of "*bhay nahi bharosa*" (trust, not fear) in Bengal rang true.

Vernacularisation of national politics is possible provided parties and leaders engage with commitment, adaptability, and context-specific political narratives

Although Banerjee retained significant public influence, there was a strong anti-incumbency sentiment against her party's cadres and local leadership. The election thus evolved into a contest between a broader Hindutva-inflected Bengali identity and a Bengali identity with regional vernacularisation. In this contest of identity, the former appeared to prevail. BJP leaders—including PM Modi, Amit Shah, Dharmendra Pradhan, Nitin Nabin, Devendra Fadnavis and many others—campaigned extensively, reaching out to voters across the state. The party organisation worked diligently while also remembering to respect Bengali cultural sentiments.

This victory may also indicate a broader trend—the growing prominence of national politics led by a party like the BJP, which seeks to incorporate regional aspirations within a larger national framework. The victory in Bengal reflects the party's "*purvodaya*" (rise in the east) strategy. Leaders such as Pradhan were pivotal for the BJP's victory in Odisha in 2024. He played a crucial role in the neighbouring state too. Pradhan, who was election in-charge for Bengal, is known for his inclusive political acumen and considered as someone who is able to resolve the aspirational conflicts among the cadres and keep them united.

During a discussion on the Bengal results, an urban, middle-class Bengali intellectual remarked, "The term Hindutva was first used by Bengali writer Chandranath Basu around 1890... this result shows that the idea has now taken deep root there." Indeed, it was a challenging ideological battle for the BJP to establish political success in Bengal.

The Tamil Nadu election results are proof that actors and their charisma are still powerful in the state's politics. Even around two years ago, when I visited Tamil Nadu, many in the state were already anticipating the newly formed TVK's success, so for the ruling establishment the writing was on the wall. True, Tamil Nadu and Kerala remain elusive for the BJP. Although the party is devising cultural and political strategies to integrate the Tamil identity into a broader national framework, the results show that it still has a long way to go.

In Kerala, anti-incumbency sentiments against the Left Democratic Front (LDF) facilitated the return of the United Democratic Front (UDF). The state continues to operate within a two-front political system, with power alternating between alliances. The BJP is making efforts to expand its presence by developing a cultural and political narrative that resonates with a wider section of society. However, it is still in the process of shaping an effective political language for the state.

In Puducherry, a local faction of the INC, All India NR Congress, led by Chief Minister N Rangaswamy, gained preference over the main party, highlighting the importance of regional dynamics even within smaller territories.

Overall, the results of these five Assembly elections suggest that the vernacularisation of national politics is possible provided parties and leaders engage with commitment, adaptability, and context-specific political narratives. They also demonstrate the BJP's capacity to learn from past experiences and convert setbacks into victories. More broadly, these trends indicate a shift in Indian politics towards nationalism influenced by Hindutva combined with developmental and inclusive messaging. This brand of politics has proved its capacity to co-opt diverse contesting regional political aspirations—sooner or later.

Three things India can do to grow

NIRVIKAR SINGH
Professor of Economics, University of California, Santa Cruz

India has to be more serious about its green transition, push harder in manufacturing certain kinds of products, and educate its population more widely and effectively

THE CURRENT US administration has been remarkable in its rejection of the post-World War II global order, from last year's tariff wars (still continuing) to the more real war on Iran. This latter war is having much more serious consequences than the tariff turmoil, disrupting energy supplies, destroying infrastructure, and consuming substantial quantities of real resources (as any war does). The main economic beneficiaries of these wars have been those within and those close to the current US administration. Most of the rest of the world has been trying to manage responses to minimise the economic costs being imposed by US policies. One reason that the US has not seen more political fallout or resistance is that the AI boom, truly extraordinary in its magnitude, has kept things afloat, from spending on data centres to elevating the valuations of a small number of AI companies. Much of this positive impact is within the US, along with a few companies in other countries, such as Samsung in the Republic of Korea and TSMC in Taiwan.

India is in a particularly vulnerable position, and the latest conflict initiated by the US administration is much more threatening than the tariff turmoil which pushed India to be more strategic—and potentially more open—in its approach to international trade and trade policy. The soaring cost of oil, and negative impacts on petroleum products such as fertilisers, can have enormous consequences for India's economic growth. On top of this, analysts have been highlighting that AI will reduce job creation in India's IT sector, which is service-intensive and is based on skills such as software development that are early candidates for AI automation.

In the overall scheme of things, the number of jobs in India's software sector is relatively small, but they do have multiplier and spillover effects on ancillary services within the sector, and consumption spending on products and services outside the sector. Indian government officials have spoken about upskilling and reskilling, and one can guess that larger Indian IT firms are already pursuing this route—after all, they successfully demolished the early claim that they would remain providers of "techno-coolies" when the initial software boom began.

Just as US-led trade war reminded India of the need to be strategic in how it participates in the global economy, the war on Iran should bring more policy attention to how the world is changing

But the really consequential response from India and its policymakers has to come elsewhere. What are three things India must do?

First, India has to be more serious about its green transition. Many of its plans for this transition seem to have remained on paper. Pushing more aggressively on building solar power capacity, and on shifting to electric vehicles will reduce the country's vulnerability to oil and its various derivative products. Of course, fertilisers and jet fuel are not going to be replaced, but there is plenty of room for reducing fossil fuel dependence in other cases.

Second, India needs to push harder in manufacturing certain kinds of products. The green transition and the ageing of the global population, especially in the West, are going to create new or higher demands for many products, from solar panels to health condition monitors to walkers. Even in cases like solar panels where China dominates global manufacture, if one projects global demand based on what will be needed to reduce carbon emissions meaningfully, there is room for new entrants. Aside from making products, new jobs in maintaining new kinds of products and infrastructure will also be created. Therefore, a new manufacturing and services ecosystem has to be envisioned, and its development accelerated. Achieving economies of scale quickly is vital, and the benefits of learning by doing will reinforce that process if it is pushed hard.

The third thing India needs to do is educate its population more widely and effectively, especially in basic ways. Early childhood education (and health) is still below where they can be for a country of India's per capita income levels. The needs are wide-ranging. Arvind Virmani has emphasised that India needs to provide upskilling in very prosaic professions, such as plumbers and electricians, not just high-end software jobs. Other research suggests that India does not have a shortage of doctors for its per capita income levels, but all the other human components of an effective healthcare system—including nurses, technicians, and other specialised support staff—are in short supply. At the other end of the spectrum, India is also underinvesting in research and innovation, both in the public and the private sectors—this also can be fixed with some policy attention.

Just as the US-initiated trade war reminded India of the need to be strategic in how it participates in the global economy, the war on Iran should bring more policy attention to how the world is changing, or is likely to change. Dealing with climate change and ageing populations are going to be major drivers of how the global economy evolves, irrespective of short-term impacts of conflicts (assuming that such conflicts do not escalate into annihilation). India can accelerate its own green transition, build an economy based on that, and on the needs of ageing populations, and give its people the education and skills to participate widely in that economy.

LETTERS TO THE EDITOR

Case for compliance

"RBI has spoken, finally" (*FE*, May 4) makes a compelling point about regulatory fairness. Other upper-layer NBFCs complied with listing mandates within prescribed timelines. Allowing Tata Sons an extended window, however informally, set an uncomfortable precedent. Regulations lose force precisely when prominent entities appear to operate under different rules. The RBI's clarification is a welcome step, but clarification without a firm compliance timeline amounts to little. The central bank must now set an explicit deadline. Tata Sons, to its credit, commands enormous public trust. That reputation is best protected by embracing transparency, not resisting it. Listing would improve governance visibility across one of India's most consequential corporate structures. The case for compliance is not just regulatory—it is reputational.
—SM Jeeva, Chennai

Ball in Tatas' court

Apropos of "RBI has spoken, finally" (*FE*, May 4), the long-running uncertainty around Tata Sons' proposed listing has come into sharper focus, as the absence of a clear response from the RBI had allowed multiple interpretations to linger. Now, the space for Tata Sons' to avoid listing appears extremely narrow, raising broader questions about regulatory fairness and consistency in such cases. From a governance viewpoint, a listing would better align with expectations of transparency and accountability, with the RBI's role being indispensable in setting clear compliance timelines and benchmarks for corporate etiquette in India. With the RBI having spoken, it is now up to Tata Sons to respond with equal clarity and intent.
—PV Prakash, Mumbai

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{ OUR TAKE }

A boost for NDA, jolt to INDIA bloc

The BJP is the big gainer from this round of assembly elections. The defeat of the DMK and the TMC, two major advocates of federalism, leaves the national Opposition space diminished

The Trinamool Congress (TMC) and the Dravida Munnetra Kazhagam (DMK), the third and fourth largest parties in the Lok Sabha (by representation) among the Opposition, and the fourth and fifth largest overall, were voted out of power in West Bengal and Tamil Nadu, respectively, in the latest round of assembly elections declared Monday. The results should worry the INDIA grouping of Opposition parties because they suggest a further shrinking in electoral mindspace occupied by parties other than the national political hegemon, the Bharatiya Janata Party. Sure, Vijay's Tamilaga Vettri Kazhagam (TVK), which emerged the largest party in Tamil Nadu, isn't allied with the BJP, but it isn't aligned with the Opposition either. Its politics aren't clear, but one of its biggest talking points during the campaign was that it was neither the BJP nor the DMK, indicating an anti-status-quo and anti-establishment rhetoric reminiscent of the Aam Aadmi Party.

How does one read the election results for four states and one Union Territory? The BJP retained Assam; the NDA, Puducherry; and the Congress-led United Democratic Front swept Kerala, but all three results were expected. Everyone expected West Bengal to be close, though the vote shares and seat shares show that it was anything but (the BJP won 45.85% of the votes for wins in 204 seats and leads in two, compared to the TMC's 40.80% for wins in 75 and leads in six as of 11.30 pm). The real surprise was Tamil Nadu, where an upstart start-up engineered an upset, winning 34.92% of the vote for wins in 106 seats and leads in one, in a result that, on the face of it, reiterates the real-life influence of reel-life protagonists south of the Vindhyas, although a deeper reading points to a more fundamental shift that should worry all established political parties. Are there any commonalities in the results? Can political parties learn something from them? And what do the results mean for national politics?

AT A LARGER LEVEL, THE RESULTS ALSO PROVE THAT WELFARE POLITICS CAN ONLY GO SO FAR — ESPECIALLY IN A COMPETITIVE SCENARIO WHERE EVERY PARTY PROMISES TO KEEP THE TAP FLOWING

The last question is the easiest to answer, for the BJP is a big gainer, perhaps the biggest one, from this round of assembly elections. It has retained Assam and Puducherry, and won West Bengal for the first time in history (and soon after Bihar got its first BJP chief minister). Its alliance in Tamil Nadu has not done badly at all, and it will see the entry of a third force, the TVK, in a contest that has remained bipolar for 60 years as evidence that there is still space available in the state's politics. The party has also managed a respectable vote share in Kerala and won three seats.

Better still from its perspective, two large federal parties, the TMC and the DMK, have suffered losses. There is little the Opposition can take heart from; indeed, there is nothing that could have made the outcome worse for it, and losses to the TMC and the DMK are likely to deepen existing fissures within the INDIA grouping that wins might have papered over. The BJP will also see Monday's results as final proof that its performance in the 2024 national election was an aberration, and a sign that it will come back to power in 2029, although three years is a long time in politics. And it will reap the benefits of its performance in the Rajya Sabha, where its numbers will increase.

At a larger level, the results also prove that welfare politics can only go so far — especially in a competitive scenario where every party promises to keep the tap flowing. In Tamil Nadu, the vote suggests a demographic revolution orchestrated by the young (numbers proving this are not readily available). Across West Bengal, Tamil Nadu, and, to some extent, even Kerala, the vote was against dynastic politics: Abhishek Banerjee in the first, Udayanidhi Stalin in the second, and PA Mohamed Riyas in the third were all polarising figures — and played their part in Monday's outcome. Finally, were the TMC in West Bengal (as a *Hindustan Times* columnist wrote Monday) and the DMK in Tamil Nadu over-reliant on political consultancies, rather than politics, expecting them to handle electoral outreach in addition to their traditional back-room number-crunching role?

Verdict Bengal: Decisive win in a divided state

West Bengal was the missing piece in the BJP's Hindu nationalist project in eastern India. The cultural and political impact of the victory in Kolkata will be profound

Neelanjan Sircar

The streetfighter has been beaten. For the first time in many years, some people on the ground in West Bengal saw weakness in Mamata Banerjee's Trinamool Congress (TMC). Voters complained of cut money, the violence of local workers, a lack of jobs, a desire for *poriborton* (change) — ironically the same tagline on which Banerjee swept to power in 2011.

The TMC had pinned its hopes of holding on to power to the "Bengal model" it used five years ago, a combination of winning Muslim voters and counteracting Hindu-Muslim polarisation by appealing to female voters across the spectrum. Back then, Banerjee's welfare policies such as Lakshmir Bhandar grants of ₹1,500 to women between 25 and 60 had done the trick, but this time very few people mentioned the scheme as a genuine reason to support the TMC. In this sense, the election boiled down to whether the TMC could prevent Hindu women from voting like their male counterparts (who had already been voting for the BJP in very large numbers).

Since its drubbing in 2021, the BJP had revamped its strategy in West Bengal. Knowing that it had a weaker party organisation, it sought to simultaneously dent TMC's welfarism advantage (by promising ₹3,000 to women — double of Lakshmir Bhandar), while seeking to find a narrative that would allow it start winning more in Greater Kolkata, hitherto TMC's stronghold, by painting the TMC as a party incapable of bringing economic development.

But the BJP was also helped by the Special Intensive Revision (SIR) of electoral rolls. Its impact was far greater than mere cuts and additions. As I documented with Bhanu Joshi, the real impact came in the murkiness of how it was being applied. When Hindus saw Muslims in neighbouring localities and villages being struck off the electoral rolls in a charged atmosphere, it gave way to a series of rumours to sow greater division between the Hindu and Muslim communities. Was the person really from Bangladesh? Did they have illegal documents?

Between 2021 and 2026, the BJP gained seven percentage points and the TMC lost roughly the same. If we assume that, at a minimum, BJP didn't gain any ground among Muslims in Bengal with SIR, then this translates into about one in every 10 Hindus in the state switching from the TMC to the BJP. Many people had assumed that it was easy to polarise the northern and western regions of the state (where the BJP swept again in 2026), but that this would weaken in the TMC stronghold of Greater Kolkata. However, if anything, the polarisation grew.

One of the demographic quirks of Bengal, as compared to the rest of India, is that the Muslim population is disproportionately rural. According to the 2011 Census, about 31% of the population in rural Bengal is Muslim, as compared to just 19% of the population in urban Bengal. Two things stood out. One, a very large urban-rural gap emerged in voters, with those in urban and peri-urban areas disproportionately siding with the BJP; two, the gender gap nearly closed in South Bengal as religion became the predominant predictor of vote choice.

In 2021, Greater Kolkata was an outlier in the BJP's traditional mobilisation model as the urban and peri-urban spaces disproportionately voted in favour of the TMC.

But, in 2026, with the more heavily Hindu urban and peri-urban areas demonstrating higher levels of religious polarisation, many of these seats came to the BJP.

This is not to pretend that there wasn't genuine frustration with a frequently violent TMC party cadre, the lack of genuine employment opportunities in a state where hundreds of thousands were pushed into distress migration, the repeated heavy-handedness of TMC leaders and ministers, and the genuine baggage of running a government for 15 years. Banerjee's imperious ways and running the government in her image appears to have run its course, as had her welfare push. But it is also important to note that the levels of polarisation we observed were not simply a function of local dynamics but rather driven by the actions of the State.

A little more than a decade ago, who would have imagined that the major states of eastern and northeastern India — Assam, Bihar, Odisha, and West Bengal — would all be under the BJP? PTI

What happens next? The BJP has swept the election, and will form the state government. Some will continue to believe that the BJP came to power by using central government resources to unfairly target the Muslim community. But even for those "whose side won", what will be the expectations for a party that had little ground cadre in the run-up to the election?

West Bengal has never seen a BJP government. In contrast to an imagination of politics dominated by Prime Minister Narendra Modi and chief minister Banerjee, most people we spoke to did not care much who the BJP would choose as chief minister, as long as there was a change in government. The BJP will have to start by demonstrating that it can be better, lowering the levels of local party violence and corruption that Bengalis became accustomed to during Left and TMC rule.

Nonetheless, the cultural and political impact of this victory for the BJP will be profound. Bengal was the last, and most important, piece of the Hindu nationalist project in the East. A little more than a decade ago, who would have imagined that the major states of eastern and northeastern India — Assam, Bihar, Odisha, and West Bengal — would all be under the BJP?

In addition to infrastructure development and more welfare, there has been an escalation in communalism in BJP-ruled Assam. What course will Bengal take?

Neelanjan Sircar is an associate professor at Ahmedabad University. The views expressed are personal

A Dravidian mutation in Tamil Nadu called TVK

Karthick Ram Manoharan

For almost six decades since the Dravida Munnetra Kazhagam (DMK) first captured power, Tamil Nadu has been under the rule of what are commonly known as Dravidian parties. Alternating between the DMK and the All-India Anna Dravida Munnetra Kazhagam (AIADMK), the two major players, the dominant political discourse in Tamil Nadu has revolved around the two key points of social justice and state autonomy. The two parties competed with each other on who provided better representation for the diverse communities in the state, who delivered better welfare policies, and who could better protect Tamil Nadu's interests in dealing with Delhi. Today, Vijay's Tamilaga Vettri Kazhagam (TVK) is on the verge of upending Dravidian rule. But he is a product, and in a sense, an extension of Dravidian politics, a mutation.

Vijay has been vocal in attacking the DMK for being corrupt, while also opposing the communal politics of the BJP. Much to the consternation of the AIADMK which saw itself as DMK's major rival, Vijay projected the TVK as the main opposition to the DMK. And the results have shown that his dialogues had real punch and delivered votes.

But Vijay did not claim to break from the Dravidian political legacy. Periyar is one of TVK's ideologues. Vijay speaks positively of DMK founder CN Annadurai and AIADMK founder MGR. Further, he also has similar positions on social justice and state autonomy like the two major Dravidian parties. In what way is he different?

Four other political formations have tried to dislodge the main Dravidian parties, with no success. The Vanniyar-centric Pattali Makkal Katchi and the Dalit-centric Viduthalai Chiruthaigal Katchi (VCK) began as militant outfits, mobilising socially and economically marginalised castes. But the reality of elections forced them to compromise and ally with the DMK or the AIADMK. Today, VCK leader Thirumavalavan speaks as a passionate Dravidian ideologue. Vaiko's Marumalarchi Dravida Munnetra Kazhagam and Vijayakanth's Desiya Murpokku Dravidar Kazhagam operated within a loose Dravidian framework. They are now reduced to junior partners in the DMK alliance, with no independent future.

The BJP's Hindu nationalism had no takers in the Hindu majority state of Tamil Nadu, since the Hindus here saw no threat to their religion or practices. Seeman's Naam Tamilar Katchi offered a nativist Tamil nationalism as a challenge to Dravidian politics. They gave equal representation to women among their candidates and tried to highlight issues around ecology in their campaigns. But they committed political hara-kiri by glorifying LTTE leaders as Tamil Nadu's leaders while disparaging Periyar and other Dravidian icons.

Vijay on the other hand played his cards well and followed a safe path. By paying obeisance to the Dravidian legacy and by speaking in its idiom, Vijay was able to show himself as an opponent of the DMK as a party, but not of the achievements of Dravidian rule. His rise, in a sense, is both a credit and criticism of Dravidian politics. Credit, because even as an alternative, he is still operating within the same ideological contours; criticism, because in his very first election he was able to outdo both the DMK and the AIADMK.

Supporters of Vijay would like to compare him to MGR. Opponents would note that MGR already had decades of rich political and organisational experience working in the DMK before he floated the AIADMK. But that only makes Vijay a more interesting case study. Besides, one should also consider Vijay's audience. A generation of young people socialised on TikTok, Instagram and YouTube reels. They want change, and want the change to be instant, noticeable and trendy. These young people, men and women alike, are likely products of Tamil Nadu's STEM friendly environment. And they are proof that technical education and rational thinking are two different things.

MGR's most popular songs were loaded with thoughts on social and economic justice, Tamil-Dravidian assertion, and respect for women. Vijay's most popular song in Tamil Nadu — in fact, across India — is "*Appadi podu*" (put it that way). The song is a peppy, fast-paced, incoherent mish-mash of sentences, and is a popular hit in Tamil weddings, as well as many North Indian ones. This song, more than his more politically loaded ones like "*Aalaporan Tamizhan*" (the Tamil will rule) captures the wild enthusiasm of his support base. Vijay is a bigger political miracle than MGR. His success as a novice raises eyebrows, and hard questions about assumed notions about Tamil Nadu. Academics and journalists covering Dravidian politics must be more agile, like the dancer that Vijay himself is, to understand this phenomenon.

Unfortunately, the Dravidian intelligentsia responded to the rise of TVK with a similar contemptuous high-handedness that the Congress of the 1950s and '60s had towards the DMK. The elite Congress leadership saw the DMK leaders as amateurs and their supporters as mere uneducated ruffians. And in 1967, the DMK permanently ended Congress rule in Tamil Nadu.

TVK will not end Dravidian politics. Its victory was surprising, and its future may hold more surprises. As long as Vijay operates within the ideological parameters that the people of Tamil Nadu have been used to since 1967, he is not a revolution, but rather a continuation in a different name. However, one can't escape the conclusion that May 4, 2026, shows the mutation of Dravidian party politics. Star power and the post-ideological voter are aspects that need more investigation. As for what Vijay will do when in power, one can perhaps paraphrase a dialogue of his, "We are waiting."

Vijay has been vocal in attacking the DMK for being corrupt, while also opposing the communal politics of the BJP. PTI

Karthick Ram Manoharan is the Smuts Visiting Research Fellow at the University of Cambridge. The views expressed are personal

{ NARENDRA MODI } PRIME MINISTER

Victory, defeat are part of democratic politics ... the people of four states (and one Union Territoriy) have shown (the world) why India is the mother of democracy

Rebranded Left lost old cadres, minority support

MH Ilias

The landslide victory of the Congress-led United Democratic Front (UDF) in the assembly elections in Kerala was widely anticipated. Most exit polls converged on a thin margin, while many independent analysts could see a clear wave. However, none foresaw the scale of UDF's win.

There are two reasons why the UDF should savour this success. One, the delimitation of assembly constituencies in 2008 redrew Kerala's electoral map in favour of the CPM-led Left Democratic Front (LDF). This was reflected in all the outcomes since the 2011 assembly elections. Two, the CPM's incumbent MLAs were seen to be popular, which influenced the party to renominate most of them. Against this backdrop, crossing the three-figure mark in the 140-seat assembly is no small deal.

The massive mandate of the UDF comes from multiple factors, ranging from an anti-incumbency sentiment; strong resentment within the Left parties, especially against the top leaders for their perceived arrogance; the alleged theft and misappropriation of gold plates at the Sabarimala temple; and the consolidation of minority votes in favour of the UDF.

The LDF was seeking a third consecutive term, having, in 2021, broken with Kerala's tradition of office alternating between the two fronts. It believed the development of public infrastructure, a focus on the health and education sectors, and initiatives on building a comprehensive social welfare agenda, including a significant increase in pensions, would yield results. Voters weren't impressed.

At the core of the erosion of the CPM's base is a shift in political strategy, which saw the party completely or partially abandon certain values and political positions that had distinguished the Left parties in Kerala. In the last five years, the CPM prioritised a discourse of "development" over "ideology" in a bid to rebrand the party and make it more appealing to the masses, especially the middle class.

The shift in strategy, or "image revamp", became explicit with the induction of a new class of spin doctors, mostly media professionals, who introduced messaging in ways very different from that of the traditional leaders. The spin doctors preferred cosmetic measures, whereas a radical revamping of the party was the need of the hour.

The shift in strategy even diluted the CPM's traditional anti-imperialist stance that the communist parties upheld for decades. For instance, the Left preferred to be silent in its election campaign on two recent international crises — Israel's aggression on Gaza and the war waged against Iran by the US and Israel. The CPM feared that open endorsement of anti-Israel positions could lead to the erosion of support among the majority Hindu community. The same party had overtly backed Saddam Hussein, the former president of Iraq, against the US in 1992 and rallied around the Muslim community. The LDF won the local bodies poll that year.

The widespread perception that the CPM endorsed Vellapilly Natesan, president of the Sree Narayana Dharma Paripalanana Sangham (SNDP), an organisation established by the social reformer Narayana Guru, who frequently made anti-Muslim remarks, led to a consolidation of Muslim votes (27% of the state's population) against the party.

Similarly, Dalit outfits felt that the LDF was increasingly immune to questions of social justice; its endorsement of reservation for the economically weaker classes (EWS) did not go down well. Dalits and the Ezhavas, an OBC group, were the mainstay of the Left in Kerala. Though the Congress-led UDF held an uncritical view of EWS, it reached out, by accommodating leaders from these communities in various party fora.

Moving to Christians, the other significant minority in Kerala, the introduction of the Foreign Contribution (Regulation) Amendment Bill 2026 by the Union government amid the election campaign, deeply influenced voting preferences. The clergy viewed it as a serious threat to minority-run institutions. This being a national issue, the Christian community may have felt that the CPM was less effective than the Congress in addressing it at the national level due to its relative lack of numbers in both houses of Parliament.

The election outcome has significantly underscored the importance of national issues and the lack of trust in the LDF among minority communities and Dalits in Kerala. The LDF, particularly the CPM, will need to tweak its idea of inclusive politics if it wants to win back significant sections that voted against the front and party in this election.

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Promise and delivery

Record turnout reflected demand for change

Except Assam and the Union territory of Puducherry, the principal message from the results on Monday of the Assembly elections is that the voters are looking for change. Nothing demonstrated this better than the strong showing by the Tamilaga Vettri Kazhagam (TVK), an underestimated two-year-old party founded by a 51-year-old actor-turned-politician, Joseph Vijay Chandrashekhar (popularly known as Vijay). The TVK has given two entrenched and storied political parties in the state — the incumbent Dravida Munnetra Kazhagam (DMK) and its perennial opponent, the All India Anna Dravida Munnetra Kazhagam (AIADMK) — a run for their money. Vijay leveraged his enormous star power to present himself as a "disruptive" alternative — which nevertheless included proposals for hefty freebies, including cash and gold, along with scholarships targeting women and youth voters who turned out in large numbers. In Kerala, the electorate reverted to type, by swinging between two established political coalitions. The Congress-led United Democratic Front managed to overturn a historic two-term victory of Pinarayi Vijayan's Left Democratic Front by a generous margin.

The most humbling lessons of anti-incumbency, however, came from West Bengal, where the Bharatiya Janata Party (BJP) finally fulfilled its ambition of ousting Mamata Banerjee's Trinamool Congress (TMC) after the latter's 15 years in power. The record turnout across both phases and the sheer scale of victory make it clear that the impact of the undoubtedly controversial Special Intensive Revision (SIR) did not play such a critical role in the election outcome. The TMC miscalculated by making it front and centre of its election campaign. This did not help downplay the increasingly erratic nature of Ms Banerjee's governance. Stagnating investment, growing party corruption, a non-empathetic approach to women's safety, and mounting political violence all played their part in the growing disenchantment of young voters and women. The TMC government's opposition to central schemes like the Ayushman Bharat-Pradhan Mantri Jan Aarogya Yojana may also have played a role. Ms Banerjee's policy of appeasing minorities as a "safe" vote bank also militated against her when an Opposition in the shape of the BJP presented itself as a credible alternative. It speaks volumes for Ms Banerjee's governance record that the BJP is reported to have made notable inroads into several Muslim-dominated constituencies.

Once the final results are out, the real business of governance will test the mettle of the incoming governments. In Tamil Nadu, where the TVK will probably need allies to form the government, Vijay may find debt and fiscal position diminishing the generosity of the welfare schemes he has promised. These include a ₹2,500 monthly allowance for women; marriage assistance for poor women (gold and a silk saree); free cooking gas, transport, and hygiene products for poor women; scholarships; and starter loans. In Kerala, the principal challenge lies in managing the immediate crisis of the diminution of Gulf jobs and remittances, which have long disguised the lack of economic growth and jobs in the state. In multicultural West Bengal, the BJP's "development" agenda will be tested against the overt communal polarisation of Bengali society. Balancing these competing forces will entail reversing land laws, tamping down decades of political violence, and making the state business-friendly after many decades. As parties have discovered in the past, bridging the gulf between winning and governing can be a challenge.

Strengthening preparedness

New disaster-warning system will protect lives

On Saturday morning last week, millions of Indians were jolted by a loud siren and a flashing message on their phones of an "extremely severe" alert, part of a nationwide trial of India's new mobile-based disaster-warning system developed by the Centre for Development of Telematics (C-DoT) in collaboration with the National Disaster Management Authority (NDMA). This system uses "Cell Broadcast Technology", which enables authorities to send geotargeted alerts to all mobile devices within a defined area simultaneously, and is faster and more reliable than conventional SMS. The initiative aligns with global standards such as the "Common Alerting Protocol", as recommended by the International Telecommunication Union, and builds on India's existing Integrated Alert System "SACHET", which has already disseminated over 134 billion SMS alerts in more than 19 Indian languages during past disasters.

The urgency behind such a system is evident. India is increasingly exposed to extreme weather events such as heatwaves, cyclones, floods, and cloudbursts, making rapid, last-mile communication critical. Early-warning systems have proven globally to reduce disaster mortality significantly, and India's own experience with cyclones has shown that timely alerts can save thousands of lives. As United Nations Secretary-General António Guterres has emphasised, disaster-related mortality is significantly lower in countries with robust early-warning systems, and even 24 hours' advance notice can reduce potential damage by up to 30 per cent. A robust mobile-based alert system, therefore, has the potential to scale up these gains nationwide.

While India's high mobile penetration provides strong foundations for a nationwide alert system, connectivity is uneven, particularly in remote and rural regions, and device compatibility varies widely. Not all handsets support Cell Broadcast Technology, and even among those that do, users must often have specific test channels enabled to receive such messages. More fundamentally, the credibility of any early-warning system begins with the accuracy of forecasts. Alerts triggered by imprecise or poorly calibrated predictions risk becoming false alarms. Over time, repeated inaccuracies can erode public trust, leading to alert fatigue.

Equally important is the challenge of inclusion. Vulnerable groups such as the elderly and persons with disabilities may face barriers in receiving, interpreting, or acting upon digital alerts. Bridging this last-mile gap will require a multilayered approach that integrates mobile alerts with traditional communication channels such as radio, public-address systems, sirens, and local-governance networks. Finally, effectiveness depends on public preparedness. Advanced systems like Japan's J-Alert or the United States' Wireless Emergency Alerts combine technology with sustained awareness campaigns and clear protocols on "what to do". Citizens must not only receive alerts but also understand what action to take. This underscores the need for grading the alerts by distinguishing between advisory, moderate threats, and extreme threats to ensure that urgency is communicated without causing confusion. The trial signals progress, and the relevant entities must build on it with the aim of achieving forecast accuracy, seamless delivery across devices and networks, inclusive last-mile reach, and sustained public awareness.

Unshackling India's labour laws

Exiting outdated ILO conventions won't make India anti-worker

ILLUSTRATION: BINAY SINHA

In 2023, when Karnataka amended its Factories Act to allow 12-hour shifts for approved factory workers, trade unions lodged a complaint with the International Labour Organization (ILO) in Geneva. The complaint argued that the change violated India's obligations under the ILO's Hours of Work (Industry) Convention, 1919 (C001), which fixes a maximum of eight hours per day and 48 per week. What should have been a domestic debate about trade-offs between productivity, wages, and worker choice became an international case file.

This is not a one-off incident. It is the predictable outcome of a century-old decision: India bound itself to one of the most intrusive parts of the ILO rulebook on working time.

LAVEESH BHANDARI & BHUVANA ANAND

An eight-hour day written in stone: India is a founding member of the ILO and has been a permanent member of its Governing Body since 1922. Over time, we have ratified 47 ILO conventions and one protocol, 39 of which are still in force. Among the earliest was Convention No 1 on Hours of Work (Industry), ratified in 1921. As a consequence, whenever anyone in India wants to experiment with different models of working time, say a four-day week with longer shifts or accommodating seasonal surges in export sectors, we are battling an international treaty.

This would be less of a problem if the convention reflected universal consensus. Only 52 of the ILO's 187 member states have ratified C001, and only 30 have ratified the accompanying Hours of Work (Commerce and Offices) Convention, 1930 (C030). Major manufacturing powerhouses like the United States, Germany, China, South Korea, and Vietnam have not ratified C001. New Zealand, in fact, took the opposite route. After running with the convention for several decades, it "denounced" the working hours convention, and now regulates working time through national law and bargaining.

India is, therefore, in a curious club: A large, still-industrialising, labour-gifted economy that has voluntarily put itself under a 1919-era hours treaty that most of its export competitors have avoided. Not just in working hours, India, with its 47 signed conventions, has been far more active than other large manufacturing countries such as the US with 14, and China with 28. Labour has been assigned to the Concurrent list in India's Constitution; that is, labour is in the ambit of both the Union and state governments, but Union laws override.

Therefore, whenever the national government signs an ILO convention, it automatically overwhelms any state-level action. But that is not all.

How the ILO can influence domestic policy: Why is all of this a problem beyond firm and worker flexibility? ILO conventions are not mere recommendations. What makes the ILO unusual among United Nations bodies is its direct complaint machinery and its tripartite nature. Any employers' or workers' organisation, another member state, a delegate to the International Labour Conference, or the ILO's own Governing Body can lodge a representation or complaint. In serious and persistent cases, this can result in a Commission of Inquiry. If a government does not agree to implement a Commission's recommendations, the ILO Governing Body may recommend to the International Labour Conference "such action as it may deem wise and expedient". Besides, ILO rulings factor into trade and aid conditionalities, particularly with the European Union, and can cause international embarrassment.

For India, this means that those unhappy with reforms need not work only through the political process and the legislature. They can circumvent the natural political process and directly appeal to Geneva, cite C001 and similar instruments, and trigger a formal process that ties the government's hands. Since 2020, many labour unions have reportedly approached the ILO on the new labour Codes, which may have contributed to the delay in their implementation.

Sovereignty is about who decides trade-offs: The question is not whether limits on working hours or the commitments in other conventions are good. The real question is who decides the trade-off between working time, wages, productivity, and employment in India: Our own Parliament and state legislatures, accountable to Indian citizens, workers, firms, or a Geneva-based apparatus of committees, experts, and bodies that are not accountable to our institutions?

We have to do what is right for India and Indians. India is still transitioning out of informality. Rigid formal-sector ceilings on hours can perversely push marginal employers and workers to stay informal. India's large labour unions, which can use the global body's powers, are themselves not subject to many rules. The ILO is designed on tripartite principles; labour unions are parties whose rights are protected through many conventions. However, these same unions are not accountable and, therefore, cannot be censured by the ILO. In other words, it is a one-sided platform where governments voluntarily reduce control over their own laws.

India is competing in global markets with non-ratifying peers like the US, China, South Korea, and Vietnam who enjoy far greater room to adjust working-time regimes. Experimentation with four-day weeks, compressed shifts, and flexible regular hours over extended periods that workers can opt into during peak months are all off the table if we remain locked into our ILO obligations. Even something as basic as the Diwali demand surge cannot be serviced efficiently by the formal manufacturing sector, leaving consumers deprived of quality products and workers stripped of earning opportunities.

None of this means turning our back on core labour rights. India has its own laws that protect its workers. Moreover, India has already ratified six of the 10 "fundamental" ILO conventions, including those on forced labour, equal remuneration, non-discrimination, and child labour. Some, like the child labour convention (C182), now enjoy universal ratification across all 187 ILO members and reflect a genuine global minimum standard. Moreover, nothing stops us from having robust social dialogue at home. In fact, it would be healthier if Indian workers, employers, and governments debated these questions in Indian forums, recognising domestic constraints.

The ILO was born in a world of imperial powers and early industrialisation. A century later, India is a large, self-governing democracy trying to create jobs, move workers out of informality, and compete in global value chains. Our engagement with Geneva should reflect that shift. Reexamining and exiting from a handful of outdated conventions would not make India anti-worker. It would simply free us to determine and execute domestic policy in line with the national interest.

The authors are president of CSEP and CEO of Prosperiti, respectively. The views are personal

The devil wears fine print

David Frankel's *The Devil Wears Prada 2* is, surprisingly, not about fashion but about saving journalism. The sequel to the 2006 superhit set in the world of fashion is an ode to good writing, facts, and bringing untold stories to people. Andy Sachs (Anne Hathaway) comes back as features editor at *Runaway*, a fashion magazine. In the first film, she was an assistant to Miranda Priestly (Meryl Streep), its difficult but hugely successful editor. Only this is 2026. Digital has hit publishing hard. The suits (consultants) are trying to cut costs, staff, features, everything. After much drama, Sachs and Priestly get an investor willing to fund the kind of work they want to do, and it all ends happily.

MEDIASCOPE

VANITA KOHLI-KHANDEKAR

However, real life has shown that getting a big investor to save a publication is, at best, a band-aid solution. Jeff Bezos bought *The Washington Post* in August 2013 for $250 million in cash. He took it digital, made it profitable and repeatedly emphasised his commitment to its editorial stance. That changed in the runup to the presidential elections in 2024, when it broke with tradition to say that the paper would not be endorsing Democratic Party nominee Kamala Harris as President. The staff was cut by a third, and its editorial stance has changed.

Other investors who bought local newspapers have done the same — slashed costs and staff, reducing the brands they bought to almost nothing. There are, however, also those that have invested in deepening the quality and spread of journalism, like John Henry of Fenway Sports Group, who has done so with *The Boston Globe*, which he bought in 2013.

The news business has been in free fall as readers shift online but revenues don't. From about $60 billion in advertising and subscription revenues and 60 million copies sold in 2000, the US newspaper market is down to $20 billion in revenue and 20 million copies sold in 2022. Around a third of global news consumers use Facebook (36 per cent) and YouTube (30 per cent) for news every week, according to the 2025 Digital News Report from the Reuters Institute for Study of Journalism. Instagram and WhatsApp are used by around a fifth. More than half the sample surveyed (58 per cent) remain concerned about their ability to tell what is true from what is false when it comes to online news. This is highest in Africa (73 per cent) and the United States (73 per cent), and lowest in Western Europe (46 per cent), says the report.

The business and consumption model for news was disrupted by the internet and then by streaming and short videos. And there don't seem to be any easy answers. Many serious publications have morphed into doing a lot of clickable stories on lifestyle, food and celebrities instead of hard local, regional, or national news. These are important to survive financially in a market where social media platforms and short video apps are the main sources of news. But for any democracy to function effectively, good journalism that informs people about what is happening is critical. But it does not pay as much as it did before. This has meant losses and the distress sale of once iconic brands. This lack of informed opinion and the dominance of big-tech in news have meant ghettoisation of audiences. It shows up in the crazy amounts of polarisation the world sees. And this is why *The Devil Wears Prada 2* may be a good watch, though it gives only a glimpse of the solution — get a good investor who believes in it.

The second part — creating an ownership structure and a scaffolding of checks and balances have proved to be key to creating a news brand that can invest in quality journalism and is editorially protected. *The Guardian* is owned by a trust that was formed specifically to protect the left-liberal journalistic values it stands for. The BBC is financed by a licence fee that UK citizens pay for owning a TV set. The Economist Group is owned by a clutch of investors that include Exor (an investment firm owned by the Agnelli "Fiat" family), the Cadbury and Rothschild families and employees, among others.

"The company's constitution does not permit any individual or group to gain a majority shareholding, and no shareholder can exercise more than 20 per cent of voting rights. The editor is appointed by trustees, who are independent of commercial, political and proprietorial influences. This structure ensures that *The Economist* can take an independent view of the world — free to challenge conventional thinking and concentrations of power. Its role is to inform, not to serve vested interests," says a section on the brand's website. You may not agree with *The Economist's* point of view at times, but it does a stellar job of informing one on world events and trends.

"*FT* (*Financial Times*) is hundred per cent owned by Nikkei, which is hundred per cent owned by its employees. Therefore we are able to take a long-term view independent of corporate pressure," said John Ridding, chief executive officer of the Financial Times Group, to me in a 2015 interview. Whether it is not-for-profit or corporate, the ownership structure and what checks and balances are in place help good brands sustain.

India, with its over 400 news channels, hundreds of newspapers, and many news sites faces the same issues. Many media researchers worry about "corporate ownership." But almost all media globally is owned by corporations. In fact, the newspaper revolution in India began with benevolent companies financing newspapers, such as *The Hindu* or *Malayala Manorama*, among others, during the freedom movement.

The ownership by a company is not the issue. What is needed is an added layer of protection to fund and sustain good journalism.

@vanitakohlik

India's neglected mental health challenge

BOOK REVIEW

NEHA BHATT

One in seven Indians lives with a mental health condition, yet 83 per cent receive no treatment, making it one of the widest mental health care gaps in the world. Trauma has been linked to a range of chronic and autoimmune conditions, including high cholesterol and cardiovascular disease. Yet it still receives far too little systemic attention.

Trauma is often understood as a limited, individual experience. Mental health researcher and professor Nishtha Lamba argues that it is, in fact, a collective and a much broader concern. In *Trauma Nation*, she describes it as a silent epidemic, "hidden in plain sight."

The book builds an overarching narrative through several personal accounts of women and men who have experienced long-lasting trauma in their lives, as children and adults. The book is strongest when it draws readers close to the private histories of the survivors the author has chosen to follow. Detailing the impact of trauma on various aspects of their lives and what helped them heal, the author situates these experiences within India's social and historical context. Research, studies and data tie these experiences together, making the book as much a collective portrait as a series of individual stories.

The book demonstrates with insight how trauma resides in our bodies, travels through generations and ripples through communities, manifesting in many forms: Anxiety, depression, physical illnesses and addiction.

While trauma is increasingly being studied and written about across the world and has become a part of our everyday vocabulary, it also needs to be examined scientifically in an Indian context. *Trauma Nation* does this with empathy and depth.

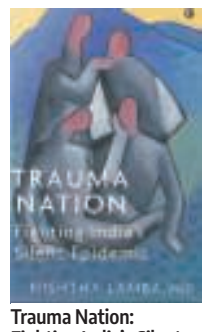
The early chapters help make sense of trauma at its most fundamental level. The author adds layers as she moves forward, unpacking it through various lenses, including the scientific history, the connection between stress, reliance and trauma. Trauma, an unhealed psychological wound, was first conceptualised in the context of soldiers returning from war in the early 1900s. But as we know it now, it can occur to just about anyone who goes through a prolonged period of overwhelming stress.

Dr Lamba's case studies are distinct and carefully considered. She examines not only the specific events that caused trauma in the lives of the survivors she interviewed, but also how these events shaped their sense of safety, bodies and relationships.

She begins with the story of Gayatri, who spent her childhood protecting her family against her father's drunken rages and living in fear. Growing up in an upper-middle class home with neighbours and relatives who were aware of the danger the women faced but who chose not to speak up, she endured the abuse till she was old enough to leave the house. For Ankita, in Hyderabad, confronting sexual abuse she faced for several years at the hands of her paternal grandfather left brutal scars, but her supportive family, including a mother who fiercely protected her when the crime came to light, helped the healing process.

Then there are the men and women who faced abuse at the hands of a spouse, experienced life-altering accidents or historical tragedies like India's Partition, carrying those scars to this day and across generations. Some traumas arise from the ways our society is structured and conditioned; others are collective, societal wounds that have shaped entire communities of Indians. Among the questions she asks are: How does childhood adversity echo through our adult relationships? How do belief systems shift in periods of distress? Do historical tragedies — such as Partition — leave an imprint across generations? How does collective resilience as a response to collective trauma help?

We are living through a time when secondary trauma, media trauma, even the effects of writing about trauma have become subjects of discussion. Balancing sensitivity with clinical insight, the book is interested in deepening the way we reflect on the many psychological questions it sparks. While many of the stories are troubling and may be triggering for some readers, Dr Lamba writes with restraint, careful not to sensationalise suffering while never shying away from difficult details.



Trauma Nation: Fighting India's Silent Epidemic
by Nishtha Lamba, PhD
Published by Aleph
217 pages ₹799

While the book presents the story of a country carrying the weight of many kinds of trauma, it is equally invested in the process of healing. The chapter "Healing Together" discusses some of the most effective therapeutic approaches available today, including psychodynamic therapy, movement-based therapies, yoga, breathing techniques, medication, and both Eastern and Western healing philosophies.

Many strands of the book come together in "Wisdom from Survivors", which goes beyond formal therapies to explore the strategies they built for themselves to cope. It's an important part of the road map the book offers to move from the "cursed heirloom" of trauma towards a psychologically safer society.

The reviewer is an author and journalist covering public health, development policy and culture

OUR VIEW

ISTOCKPHOTO

It's a good idea for India to reinvent the AI wheel

The argument that developing large language models locally would waste our resources has weakened. India must develop its own frontier AI models for the sake of strategic autonomy

In the field of artificial intelligence (AI), should India create its own large language models (LLMs) that can work on a trillion-plus parameters? Scale-wise, this would put them in contention with LLMs created by US players OpenAI, Google, Anthropic, Meta and their Chinese rivals Alibaba, DeepSeek and Moonshot, with ByteDance, Tencent and Zhipu AI not far behind. Or should India focus on creating AI tools and agents based on available models? Eminent leaders of India's success in IT services have argued in favour of the latter option. Scarce resources need not go into building frontier models from scratch, they say, as we could gain more by using what already exists to go further. This might seem to make economic sense; why reinvent the AI wheel? The rising use of AI for strategic purposes, however, has shifted the calculus. Today, AI is not just a force multiplier on the battlefield, it can be wielded for blackmail. At war, advanced AI models can identify targets for attack; at peace, cyber-security models can exploit gaps to wreak havoc on digital systems. Globally, a loud alarm has been rung by the restricted release of Anthropic's Mythos, a cyber gap-spotting model claimed to be so powerful that institutional systems could come apart if it falls into rogue hands. To ensure that this high-end scanner is only used for fixing vulnerabilities, Anthropic has reportedly granted access to just over 40 trusted entities, most of which are based in the US. If the hype around Mythos is true, then India finds itself locked out of an important cyber-safety league.

That is just one example of tech deprivation. There are others too. In all, India's strategic autonomy demands that homegrown LLMs be developed even if it means deploying significant catch-up funds. Without the defence that cyber-security AI tools offer, for example, we would be beholden to companies based in countries whose interests may or may not align with ours. The urgency would have been far less if AI were just another digital technology. Its versatility, however, has combined with recent developments to make it clear that those in possession of cutting-edge models may want to extract a price for sharing what they have. Moreover, the Cold War logic of 'mutually assured destruction,' by which peace was held by the fear that neither side could survive an exchange of nukes, might be valid in the context of AI warfare as well. To deter an attack by, say, an AI-guided swarm of armed drones, we must have the equivalent capacity to strike back.

That said, can India actually develop frontier models? We have the tech talent for it, surely. Funding should not be a constraint either. Sarvam AI, a startup based in Bengaluru, has a model that works on 105 billion parameters and takes a special approach that minimizes computing needs. But India's ambitions may need to take a quantum leap, so to speak, if the country's goal is to join the big league of LLMs. Weak access to high-end AI chips, the sort that US-based Nvidia is famous for, need not hold us back. China's DeepSeek has shown how chip denial can be overcome; since then, Huawei's Ascend chips have proven up to the task, going by the pace at which Chinese AI models have emerged. With government support, there is no reason why India should not be able to do what China has. What has been missing is the will to join what's turning out to be a US-China race. But the dangers lurking out there should change that.

GUEST VIEW

Finance must adapt fast to drive data-centre expansion in India

Financial frameworks and project assessment criteria should evolve to fund this emerging category

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

India has entered the global race of data centre expansion with visible scale and policy momentum. Niti Aayog places India's current capacity for data centres at about 1.3–1.4 gigawatt (GW) and sees a pathway to 10-12GW by 2035, with economic potential of $10-15 billion. The Union budget for 2026-27 proposed a tax holiday until 2047 for eligible foreign providers using India-based data facilities for global operations, and states are competing aggressively for investments with land and other incentive packages. Recently, Google and Reliance Industries proposed large-scale data centre investments in Visakhapatnam.

Overall investments in the sector are set to exceed $100 billion by 2027. That scale implies a substantial requirement for long-tenor bank debt, institutional capital and hybrid financing structures. For lenders, the most important challenge lies in selecting the right assets and pricing their risks correctly. Financial institutions including banks, regulators and capital markets need to treat data centres as critical digital national infrastructure rather than a niche segment of commercial real estate.

Credit appraisal, therefore, requires a wider frame than conventional project finance. Revenue visibility remains central and should be tested through enterprise contracts, committed capacity, ramp-up assumptions, customer diversification and contract durability.

Yet, contract strength alone will not define asset quality in this sector; the resource profile of the asset deserves equal weight. Data centres account for 0.5% of India's electricity consumption and 150 billion litres of annual water use, both expected to more than double by 2030. Power source, grid quality, renewable-energy access, backup architecture, cooling design, water source, basin stress, flood exposure, heat resilience and the emission trajectory should, therefore, move from the margins of diligence to the centre of underwriting.

The underwriting challenge becomes clearer with the fact that data centres are neither traditional real estate nor conventional power plants that fit neatly into a standard credit template. They are, in fact, a new category, one that combines long-tenor contracted cash flows, technology obsolescence risk, resource intensity, locational and geopolitical sensitivity in a single structure. Lenders who treat them as commercial real estate could misprice the upside.

A credible appraisal model, therefore, needs to examine whether a facility can support future rack densities, liquid cooling and artificial intelligence (AI) workloads without disproportionate retrofitting costs; whether transmission and power readiness are secure; whether cooling and water systems remain viable under heat and drought stress; and whether the developer has a proven operating record in the relevant digital assets. The strongest financing frameworks will be those that bring infrastructure analysis, technology assessment and market-risk evaluation into one discipline rather than treating them as additional sequential filters. This is the best way to avoid mispricing risks.

International practice is already moving in that direction, as evidenced in Singapore's Green Data Centre Roadmap, which links additional capacity allocation to efficiency standards, certification and green-energy pathways. The World Bank recommends evaluating facilities by emissions, energy use, water consumption and climate resilience from the design stage. The European Investment Bank and the International Finance Corporation have both embedded similar disciplines into their financing protocols. The Equator Principles, which remain a common baseline for major international project finance, treat environmental and social risk assessment as integral, not optional.

Back home, the role of the Reserve Bank of India (RBI) is crucial in shaping the financial architecture around these assets. Its directions on green deposits, climate-risk identification and disclosures provide a foundation which can be extended for a more nuanced treatment of data-centre finance. The next step could include standardized disclosure templates for large data-centre exposures, guidance on utility and climate-sensitive appraisal fields, and a more facilitative framework for instruments such as sustainability-linked loans, green or transition bonds and blended-finance structures. Such guidance could improve transparency, strengthen underwriting and deepen capital formation around efficient and resilient digital infrastructure.

India's data-centre expansion is being shaped by strong demand, a visible domestic policy push and a rapidly deepening investment pipeline. The key challenge now is to ensure finance channels this growth into assets that are resilient, energy-efficient and adaptable to technological change.

The next phase will depend on combining climate-sensitive underwriting, innovative capital structures and clear regulatory guidance to build commercially viable and future-ready data centre infrastructure in India.

10 YEARS AGO

JUST A THOUGHT

'Digital sovereignty' is the geopolitical mantra of the moment.

JENNIFER TRIDGELL

MY VIEW | MUSING MACRO

How do we evaluate academic research in the age of AI?

AJIT RANADE & SHARDUL MANURKAR

are, respectively, senior fellow with Pune International Centre, and general manager, R&D cell, with Flame University.

When a graduate student today sets out to research inflation dynamics or quantum materials, she does not head to a library database. She opens ChatGPT or Perplexity, types her query and receives a synthesized answer with the citations. She may never open a single academic paper. The research shaping her thinking has been filtered, ranked and distilled by an artificial intelligence (AI) system. This is demolishing the foundations of academic evaluation as we know it.

For decades, the proxies of research impact were clicks, downloads, page views and citations recorded in *Scopus* or *Web of Science*. Universities aggregated these to assess productivity. Funding bodies used them to allocate grants. The logic: more clicks meant more readers; more readers implied greater influence. That logic has not just broken but structurally collapsed.

AI systems such as ChatGPT, Claude, Gemini and Perplexity increasingly act as the primary gateway between research and its audience. They ingest academic literature, extract key insights and deliver synthesised responses without the user ever visiting the original source. A paper may be shaping hundreds of policy briefs, student dissertations and corporate reports, while its original journal page registers zero traffic. Influence persists, but the metrics register nothing. This is the visibility paradox: high exposure in the AI layer, complete invisibility on conventional dashboards.

The urgency is sharpened by dramatic shifts in global science. An NBER paper in January, 'The Geography of Science' by Abhishek Nagaraj and Randol Yao, analyses 44 million publications from 1980 to 2022 and documents a tectonic realignment. America's share of global scientific publications has fallen from 40% to 15%. China's has surged from near-zero to 35% in top-tier journals. By traditional metrics, China has overtaken the US as the world's dominant scientific producer.

But the same paper reveals a telling defect. Citations of Chinese research come disproportionately from within China, not from the global research community. Beijing has mastered the metric without achieving the influence that metric is meant to capture. This is the measurement system's blind spot. Citation volume disguises whether research is shaping global knowledge.

AI has also dramatically lowered barriers to citation manipulation. Generative AI can fabricate plausible looking but entirely fictitious bibliographic references, which slip into non-curated databases and inflate citation counts.

India is constructing its research ambitions on precisely these crumbling foundations. The National Education Policy (NEP) 2020 has a laudable vision: to make India a global research powerhouse, sharply increase PhD output and elevate the quality of Indian science. But the evaluation machinery—NIRF, NAAC and the funding bodies that govern Indian academia—continues to measure success through *Scopus* citations, downloads and impact factors.

Old metrics no longer reveal how influential any work is and it's time for the world to adopt new measures

India ifs ranked third globally in research publications in 2024, with output up 142% since 2015. Yet, it remains deeply underrepresented in top-tier journals. The metrics show volume but conceal quality. Now, in the age of AI, they do not even capture influence. We are trying to build a 21st century educational powerhouse using 20th century yardsticks. NEP 2020's measurement system belongs to a previous era.

Three emerging indicators are needed to replace the old measures.

Model inclusion frequency: How often a paper is retrieved and synthesized by leading AI systems when questions are posed in its domain. If a paper on agricultural credit risk in India is consistently surfaced by AI systems advising policymakers and journalists, that is real-world impact, regardless of how many humans clicked on it.

Contextual citation weight: Not merely whether a paper is cited, but how. Was it a passing mention, or did it form the foundational methodology of a subsequent study? A citation that shapes a paper's core argument should carry greater weight than one appended to a reference list.

Reproducibility and data availability: Whether a study's results can be replicated, and whether its underlying data is publicly accessible. In a world where AI can mimic the appearance of rigour, reproducibility may be the most robust signal of genuine quality. Some institutions are already proposing "research nutrition labels"—standardized disclosures of what was human-generated versus AI-assisted, and whether findings are verifiable.

Individual researchers must no longer ask, "Will this paper be read?" but "Will AI systems trust and cite this work?" Writing for AI synthesis is as important as the research itself. This means making arguments clear, evidence transparent, abstracts precise and metadata machine-readable.

India's universities are being evaluated by the standards of 2005 while operating in 2026. NIRF and NAAC, locked into citation-based metrics, risk incentivizing publication volume while genuine influence goes unmeasured. Indian researchers could stay invisible where global discourse is shaped.

The opportunity for the country is equally real. India could lead the world in defining next-generation research metrics. India has the policy ambition, a growing research base and the technical talent. The current measurement tool for excellence is what's broken. We need a new one.

GUEST VIEW

Rupee puzzle: Why its rate is not justified by India's fundamentals

Its current level reflects global capital flows distorted by AI zeal and bearish narratives about India that don't survive scrutiny

V. ANANTHA NAGESWARAN
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ISTOCKPHOTO

There is a discomforting paradox at the heart of India's current macroeconomic situation. By almost every conventional measure of sovereign economic health—growth, inflation, fiscal trajectory, external vulnerability and investor confidence in the real economy—India's fundamentals are among the strongest of any large emerging market. Yet the rupee has depreciated by over 13% against the dollar in the past two years and by more than 15% since January 2023. If exchange rates are verdicts on fundamentals, India appears to have received an unjust one.

Consider what the scoreboard actually shows. India's real GDP growth has remained the fastest among major economies, running well above 6% annually even in a difficult global environment. Inflation has stayed moderate and within the Reserve Bank of India's tolerance band. The current account deficit has been contained at low levels relative to GDP. External debt as a share of GDP remains among the lowest in the emerging market universe, insulating India from the rollover vulnerabilities that typically trigger currency crises. The Union government has been on a credible fiscal consolidation path. And three sovereign rating upgrades in this period reflect precisely the kind of institutional confidence that should, in any textbook world, be supporting the currency.

Something else has been going on, and understanding it requires looking beyond India's borders.

The Korean won offers a clarifying parallel. South Korea runs a structural current account surplus—it earns more foreign exchange from the rest of the world than it spends by any conventional measure—which should provide a durable floor under the won. Yet the won depreciated by more than 17% against the dollar over the same two-year window as the rupee. The explanation is not to be found in Korean trade competitiveness or monetary mismanagement. It lies in the extraordinary pull that the artificial intelligence (AI) investment supercycle has exerted on global capital flows, pulling money towards dollar assets and away from economies—however fundamentally sound—that are not at the centre of the AI capital expenditure narrative.

The AI investment cycle of 2023-26 has been, by any sober reckoning, one of the most dramatic episodes of narrative-driven capital misallocation in recent financial history. When a footwear company rebrands itself with an AI adjacency and sees its market capitalization rise by more than 600% in a single day, the market is no longer performing price discovery—it is running a momentum machine decoupled from any recognizable valuation anchor. The dollars flowing into this vortex came, in part, from emerging market allocations, compressing currencies from Seoul and Jakarta to Mumbai regardless of whether those economies were well or poorly managed. So exchange rates at this juncture reflect capital flows, not fundamentals.

India was not a beneficiary of the AI narrative because India is not pursuing AI through hyperscale data centre construction and chip-intensive infrastructure investment. This may yet prove to have been the right instinct rather than a missed opportunity. India has instead approached AI from the demand and application side, investing in frugal innovation and sovereign digital infrastructure. Nobody predicted that India would build world-class digital public infrastructure—Aadhaar for identity, UPI for payments, U-Win for vaccinations across the life cycle, each conceived for a specific purpose and expanded far beyond it. The quiet intelligence of that pattern—doing more with less, building for scale through ingenuity rather than capital—may well describe India's AI trajectory too. The world's assessment of what constitutes a winning AI strategy could look quite different a year from now.

Against this backdrop, some investors have been raising a second-order concern: that AI structurally undermines India's labour-cost arbitrage in IT-enabled services, while China continues to squeeze India's manufacturing space. Both arguments carry a kernel of truth. Neither carries much beyond that.

On IT services, the relevant unit of analysis is no longer the back-office operation but the Global Capability Centre (GCC). India today hosts more than 1,800 GCCs, employing hundreds of thousands of professionals who perform sophisticated work in engineering, analytics, product development and research. Admittedly, roughly half of what GCCs do is commoditized and therefore genuinely exposed to automation. But the other half represents genuine intellectual value-addition — the kind of complex, context-dependent problem-solving that AI is more likely to augment than replace. A GCC staffed with engineers designing semiconductor architectures or modelling risk for a global bank is not the same thing as a call centre handling insurance claims. Conflating the two understates how far India's services export model has already evolved and overstates AI's capacity to substitute it.

On manufacturing, the critique has more texture but requires more precision. India's merchandise trade deficit is high, and that is a legitimate structural concern. But a significant portion of it is oil-related—India is a large hydrocarbon importer in a world where energy prices remain elevated. Strip out oil and its non-oil merchandise trade deficit presents a considerably less alarming picture, with India carving out export niches in pharmaceuticals, chemicals, electronics components, defence equipment and engineering goods that were not part of the story even a decade ago.

The deeper point, however, is philosophical rather than sectoral. Did anyone in the early 1990s seriously give India a chance to build a globally competitive IT-enabled services industry that would generate a structural export surplus and employ millions of highly skilled workers? The candid answer is 'no.' The linear projections of that era, working from India's infrastructure gaps, bureaucratic constraints and capital scarcity, would have produced a confident verdict of impossibility. They were wrong, comprehensively and consequentially. Economies and societies evolve in ways that defy extrapolation. To make linear structural projections about what India can or cannot achieve in manufacturing, or in AI, or in any other domain, is to repeat the intellectual error of every previous generation of India sceptics. Complexity does not counsel optimism or pessimism; it advises humility about forecasts.

Two further data points deserve to anchor this argument. First, data on real effective exchange rates (REERs) from the Bank for International Settlements shows that through much of 2022–24, India's REER was above China's—meaning that, on a trade-weighted, inflation-adjusted basis, Indian exports had become less competitive than Chinese ones. The rupee's depreciation has corrected this misalignment, restoring a rough parity in relative competitiveness that had been quietly eroding. This is a silver lining that the nominal depreciation story rarely acknowledges.

Second, India's gross foreign direct investment (FDI) inflows for the financial year 2025-26 reached $88 billion through February alone and the full-year figure is likely to settle between $90 and $95 billion—a decisive break above the $70-80 billion range that had prevailed for four years. Unlike portfolio flows, which are driven by short-term sentiment and liquidity cycles, FDI reflects long-term, patient capital making irreversible commitments to India's productive capacity. That number does not describe an economy that has lost the confidence of investors who think in decades rather than quarters.

The rupee's current level reflects a global flow environment distorted by AI-driven capital concentration in the US, compounded by structural bear narratives about India that do not survive serious scrutiny. The fundamentals are sounder than the exchange rate implies. When the AI cycle turns—as cycles always do—that gap will close.

MINT CURATOR

The rupee's rapid slide could end India's cheap-money era

RBI may face bigger problems if it puts off hiking rates for too long

ANDY MUKHERJEE
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The time to avoid a blunt tool like rate hikes may have passed. MINT

How soon will the Reserve Bank of India (RBI) raise rates and how high will it take them? Those have become urgent questions for bankers in Mumbai after elevated energy-import costs pushed the rupee to a record low last week. RBI governor Sanjay Malhotra has signalled a preference to stay on pause. The central bank would step in, he said in an 18 April speech at Princeton University, "through its influence on inflation expectations rather than through blunt demand compression," a euphemism for monetary tightening.

Still, Malhotra's cheap-money era is likely drawing to a close, thanks to the pressure from the foreign-exchange market. The war in Iran started two months ago, and it has hammered the Thai baht, Philippine peso and the Indonesian rupiah too. Their central banks are also hesitant to raise their benchmark rates, with the notable exception of the Philippines. But the Indian currency has been Asia's worst performing over the past two years, and staying pat for too long may backfire.

A weaker rupee in 2025 may have been a deliberate strategy to insulate exporters from punitive US tariffs. RBI slashed its key borrowing cost by 125 basis points after Malhotra took on the governor's job in December 2024. It also pumped nearly ₹20 trillion into banks, nearly double the amount of liquidity support during the pandemic.

Yet the funds simply leaked out of India's banking system as global money managers dumped local assets and took dollars home. As a result, funding for banks remains tight. And now that the choked arteries of West Asian oil and gas flows threaten to drag the rupee toward the psychological barrier of 100 to the dollar (it closed at 94.92 Thursday, after breaching 95 in intraday trading), there's a risk that the capital exodus will accelerate. Of the $26 billion pulled out of the equity market by overseas investors over the past year, $20 billion of outflows have taken place since January.

Interest-rate derivative markets are betting—excessively, according to some fund managers—that RBI would be forced to roll back its pro-growth, easy-money strategy to defend the exchange rate from extending a 12% decline over the past two years. That creates a headache for bankers: How will they find takers for pricier loans in the middle of an unprecedented energy crisis?

Before the closure of the Strait of Hormuz, credit to consumers and businesses was growing at a healthy 14.5% and RBI was looking to give lending a further boost by allowing banks more freedom to deploy their capital, bringing local practices in line with international norms.

Those gains will have to wait for the fog of war to lift. The finance ministry's monthly economic review warned this week that while a supply shock is already apparent in the economy, "accompanying demand compression is a serious concern." If those apprehensions materialize, then the outlook for loans is dim.

Indian banks' reported asset quality is the healthiest it has been over the past decade, though from next year RBI wants them to make provisions against the expected risk of loan losses. It won't be a problem for private-sector banks, but their state-run rivals with large exposure to small enterprises may have a lot of cleaning up to do.

More than 25% of the non-performing loans at state-run lenders last year were from micro, small and mid-sized firms, which means banks will likely be cautious about deploying capital to these segments. Their goal may be "to protect asset quality under stress as opposed to increasing lending," according to a recent report by BMI.

So far, the government has forced refiners to not pass on the burden of more expensive crude oil to consumers already battling a crunch of LPG, the main kitchen fuel. New Delhi doesn't have the fiscal capacity to shield consumers indefinitely. The overall retail price gauge rose 3.4% from a year earlier in March, well within the central bank's target range. But with north India currently gripped by extreme heat waves—and a prediction of below-normal monsoon rainfall that may affect harvests—higher inflation may be around the corner even without energy shortages.

The time to avoid a blunt tool like interest-rate hikes may have passed. Although lenders will want to hold on to loan growth, some amount of demand destruction is inevitable. Delay it too long, and the healthy-looking bank balance sheets will be revealed for what they are: the echoes of a peace-time economy that no longer exists.

Once consumers and producers confront high inflation, their expectations of the future may worsen dramatically.

The price of putting the genie back in the bottle will then be higher-for-longer rates, a painful reversal of the credit cycle Malhotra has spent nearly 16 months trying to spark. ©BLOOMBERG

MY VIEW | A VISIBLE HAND

Any loss of Opec's pricing power would suit India well

NARAYAN RAMACHANDRAN

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Crude oil, the undistilled kind right out of the ground, was known to the Mesopotamians, Persians and Babylonians. The Chinese were the first to dig shallow wells and transport flammable oil through bamboo pipelines. Canadian geologist Abraham Gesner was the pioneer who began to distil oil and coined the term 'kerosene' in the mid-1850s.

John D. Rockefeller's Standard Oil, founded in 1870, integrated production, transport, refining and marketing of crude oil and its distillates until its anti-trust related breakup in 1911. Meanwhile, the action was heating up in West Asia; Masjed-e-Soleyman in Iran emerged as the first oil well in the country, discovered in 1908. While mature, it is still an active well, located not too far from the city of Isfahan. Massive logistics operations during the two World Wars necessitated a bulk shift in fuel from coal to diesel and petrol, adding further impetus to the rapid acceptance of energy sourced from crude oil.

For the first four decades of the 20th century, oil production was dominated by the US, with Russia a minor player. The action then shifted almost completely to West Asia for about three decades after World War II. Thereafter, there has been a balance between production by the US, Russia and West Asia.

After World War II, a wave of nationalization took place. Many countries in West Asia took back ownership of the production of crude oil from Western owners of oil facilities. British Petroleum (BP), Royal Dutch Shell, Exxon, Mobil, Chevron, Texaco and Gulf Oil, 'the seven sisters' as they were known, ceded ownership to national oil companies like Aramco, National Iranian Oil and Iraq National Oil. Later, Abu Dhabi National Oil Company (ADNOC) took over shares of a consortium made up of some members of the seven sisters.

A shift in West Asia's oil-facility ownership resulted in the creation of Organization of the Petroleum Exporting Countries (Opec). It was born in 1960 to five parents: Iran, Iraq, Saudi Arabia, Kuwait and Venezuela. Several countries joined thereafter, including Qatar (1961) and the United Arab Emirates (1967). Several that joined have also left since, such as Indonesia, Angola and Qatar. The group's principal goal was to coordinate output among producers to balance supply with demand at a price that would ensure an adequate return on capital for members. This is a polite description of a cartel that seeks to influence the global price of a commodity by managing its supply, done through a system of output quotas for member countries.

The US disrupted the oil market early in the 21st century by commercially exploiting a new technique of horizontal drilling and hydraulic fracturing (fracking) to extract oil from fields of shale sediments. As a result, in the last decade or so, it has re-emerged as the largest producer of crude oil in the world, pumping out over 13 million barrels per day, followed by Saudi Arabia, which produces a quota-adjusted 10 million barrels a day. As US production began to eat away at Opec market share and influence, the group signed an agreement with some 10 other countries, the largest being Russia, to create Opec-plus.

The UAE's exit from the oil cartel may be an opportunity to secure flows of supply that bypass Hormuz

Beyond the US, Opec and Opec+, Canada, Norway and Mexico are net exporters. China produces a little under 5 million daily barrels and consumes about 16 million, while India produces under a million and consumes about 5 million. Global consumption has topped pre-covid highs and is now about 103 million daily barrels

Three countries—Indonesia, Angola and the UAE—have quit Opec due to quota restrictions. The UAE chose to leave recently, signalling both a need to produce more oil as well as a political fissure with Saudi Arabia over the current Iran war. This decision, which at first glance seems sudden, has been in the making for several years. With oil demand over the last 10 years growing only 1% compounded per annum, the UAE wishes to monetize its resources today and use the proceeds to transform its economy away from oil dependency. While the UAE is only the fourth-largest producer within Opec-plus, it is the second-largest producer with excess capacity. In economist speak, this means that an Opec quota keeps its output below what it could be, making it forgo much-needed revenue. The UAE has also been disappointed that it has not had much regional support to defend itself during the recent conflict in Iran. This opens a strategic window for further alignment, particularly with the US. And sure enough, the UAE immediately requested a currency swap line from the US to backstop its need for dollar liquidity amid an economic crisis arising from the Gulf conflict.

The UAE's move to quit Opec is good news for India. Almost immediately, India's national security advisor made a trip to Abu Dhabi. Increased UAE oil production could help keep a lid on oil prices. Strategically, the UAE can transport some of its oil via a pipeline to Fujairah, which has the advantage of being located on the Gulf of Oman; so this route bypasses the Strait of Hormuz. India is one of the closest oil-importing countries to Fujairah and it must press home this advantage to secure new long-term contracts for crude oil.

P.S: "Cartels have spread and will spread as long as the world lacks an effective mechanism by which balanced expansion may be achieved without a resulting disruption of prices," said legendary investor Benjamin Graham.

Editor's TAKE

The verdict: BJP claims Bengal, TVK pips DMK

May 4 was all about confirming the strengths and limits of political parties, and the verdict showed that claiming India in its entirety remains a distant goal

The biggest takeaway from the May 4 assembly results is that TMC has been dislodged by the BJP, finally. After three terms, Mamata Banerjee has been ousted by the BJP. Yet another surprise came from down south where Vijay-led Tamilaga Vettri Kazhagam (TVK) dislodged the well-entrenched Stalin-led DMK. Both these results are significant from the national perspective and they will have far-reaching implications for the national politics and next general elections. The May 4 verdict yet again confirmed that Indian politics continues to have a double track – a national perspective which is predominant in the North and a regional narrative that sways voters in the South; this is the narrative which speaks to regional identities and southern issues. A few results have been on expected lines. In Assam, the BJP retained power. The party has been going strong since 2016. It has successfully fused identity politics with governance.

The party under Himanta Biswa Sarma has executed welfare schemes, undertaken infrastructure projects that resonated with the voters. He also tactfully calibrated issues like migration and citizenship, which have helped it consolidate support across communities. The leadership of Himanta Biswa Sarma has further sharpened this appeal, combining administrative visibility with political messaging.

West Bengal, however, tells a more complex story. The defeat of Mamata Banerjee and the ouster of the All India Trinamool Congress (TMC) that came to power in 2011 show the efforts the BJP put in and the anti-incumbency Mamata faced.

Bengal had accumulated grievances – ranging from corruption allegations to concerns about political violence and governance issues, which the voters addressed in their two phase voting. The BJP's rise here is less about ideological conversion and more about discontentment with the Mamata style of functioning. Yet, the scale and durability of this shift will only be tested over time. The southern states, meanwhile played to the Dravidian script, though the third force led by Vijay that appeared recently outsmarted MK Stalin. Thanks to his mass appeal and well-articulate messaging, Vijay became the number one choice of the voters; of course the anti-incumbency and plethora of mis-governance and corruption charges against the Stalin government helped him dislodge the Tamil Nadu stalwart. In Kerala, power alternated once again, with the United Democratic Front (UDF) displacing the Left Democratic Front (LDF). These outcomes underline the persistence of strong regional political cultures and linguistic identities that have kept the BJP at bay in the south. Despite organisational efforts and growing vote share in a few pockets, the party remains a peripheral player. The broader implication is clear: the BJP's strength across large parts of the north, west, and northeast contrasts with its limited footprint in the south.

Meanwhile, regional parties continue to hold ground in their bastions, but the Bengal result shows that anti-incumbency, if left unaddressed, can swiftly alter political equations. These results show that India votes in layers and no one can take Indian voters for granted!

A historic dawn: The 2026 mandate for governance, culture, and pro-incumbency

We salute the people of Bengal, Assam, Kerala, Puducherry, and Tamil Nadu. We offer our heartfelt congratulations to every BJP and NDA worker who toiled tirelessly to make this victory possible

SYED ZAFAR ISLAM

May 4th, 2026, was a day of great joy, deep gratitude, and overwhelming emotion. As the election results of 2026 unfolded before us, my heart swelled with pride as I watched the democratic spirit of our great nation roar in favour of development, stability, and cultural revival. This wasn't just an electoral victory; it was a massive validation of the sweat and blood our karyakartas have poured into the grassroots over the years.

The absolute crown jewel of this historic moment is undoubtedly West Bengal. This was not a standard political contest; it was a direct battle between the resilient people of Bengal and the cruel Trinamool Congress. And the people have won. They are not just winning by a narrow margin; they have delivered a crushing, almost two-thirds majority. The absolute majority we are securing is a glorious victory for the identity of Bengal, the restoration of democratic values, and the immense sacrifices of our dedicated workers.

For fifteen years, the citizens of Bengal suffocated under a regime that normalised violence, institutionalised corruption, and unleashed a dreaded 'Syndicate Raj'. The massive mandate is a reflection of the deep-rooted frustration people harboured against the TMC. Ordinary Bengalis saw neither development nor dignity in this period. But now, the people have uprooted this autocracy through their vote.

Women have been the pioneers of this historic transformation. The horrific scars left by incidents like Sandeshkhali and RG Kar were answered not with helpless tears, but with the silent, devastating power of the EVM. Despite the unimaginable harassment faced by the RG Kar victim's mother, the women of Bengal responded with a powerful mandate for safety and dignity. Our mothers and sisters have united to show unwavering faith in our leadership.

Let us remember the journey: in 2001, we were at 0. In 2016, we won 3 seats. In 2021, we rose to 77 seats and became the principal opposition. And now, in 2026, the BJP is forming the government in Bengal. This is nothing short of a miracle, but it is a miracle born of years of sacrifice by our workers, relentless struggle, and the trust the people have placed in Prime Minister Modi's vision.

It is more important to note what Mamata Banerjee offered this time. No 'report card' of fifteen years in power. Her entire campaign was limited to abusing the BJP, inflaming the Hindi-Bengali divide, and shielding the corrupt. She even brought in people from other states to campaign for her. But nothing worked.

> THIS MANDATE CARRIES ONE CLEAR MESSAGE: WHETHER IT IS BENGAL, ASSAM, KERALA, PUDUCHERRY, OR TAMIL NADU, WHEREVER THE BJP AND NDA HAVE EARNED THE PEOPLE'S TRUST, THE PEOPLE HAVE RESPONDED WITH OVERWHELMING SUPPORT

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For years, the TMC insulted Sanatan Dharma, hurt Hindu sentiments, and weaponised appeasement politics. TMC ministers openly threatened Hindus in order to appease their vote bank. The people of Bengal have made it clear: those who disrespect Sanatan will not be accepted in Bengal.

Looking towards the Northeast, Assam stands out as the ultimate masterclass in governance. Assam is a classic example of how a BJP government fundamentally transforms a state and builds an unbreakable bond of trust with its people. What we see here is the glorious victory of 'pro-incumbency', a phenomenon where voters actively reward good performance. In all three terms, our government in Assam has been formed with progressively greater support from the public. In this third consecutive term, we are forming the government with an unprecedented more than three-fourths majority. The people of Assam have firmly backed the 'Double-Engine' growth and the decisive actions taken against illegal infiltration. In BJP-governed states, voters do not turn against the government; they reaffirm their trust in it, because we make promises and we keep them. Every single one. While the opposition chose to shield infiltrators, the citizens chose a government committed to protecting their civilisation and driving infrastructure growth.

Down south, Kerala is witnessing an altogether new beginning. We have established ourselves as a strong choice in Keralam. We have won 3 seats, and history reminds us that the number '3' is incredibly lucky for us. Just as we once started with 3 seats in Bengal in 2016, jumped to 77 in the next term, and are now sweeping the state to form the government, Kerala is on the same trajectory. The Lotus has now been seeded and is ready to bloom soon. In the upcoming tenures, we will form the government for sure.

In Puducherry, the mandate for continuity is clear as day. We are proudly forming the government for the second consecutive term, proving that the stability provided by the NDA resonates deeply with the public. The journey towards a developed territory continues uninterrupted.

In Tamil Nadu, while we humbly accept the mandate and recognise that we must work harder on the ground, there is a massive silver lining. The DMK's crushing defeat in Tamil Nadu sends a thunderous message: "Insult to Sanatan will NOT be tolerated by India." The rejection of Chief Minister MK Stalin and Udhayanidhi Stalin makes it crystal clear: the people of Tamil Nadu have completely cast aside those who abuse Sanatan, those who obstruct the path of Deepam, and those who try to divide the nation in the name of region and language.

While we celebrate this beautiful festival of democracy, the state of the principal opposition is truly pathetic. At a time when election results are unfolding and their defeated leaders desperately need moral support, Rahul Gandhi is completely missing from the battlefield. Instead of standing with his cadre, he is away on a foreign visit, as always. A leader who does not stand beside his workers in the hour of crisis, who abandons his party's leaders and ground-level workers on this decisive moment to travel abroad-how can such a person aspire to lead the people of India? Another feather in his crown is his completion of a century of defeats. This glaring absence proves why the nation has decisively chosen our relentless dedication over the irresponsible leadership of the Congress party.

This mandate carries one clear message: whether it is Bengal, Assam, Kerala, Puducherry, or Tamil Nadu, wherever the BJP and NDA have earned the people's trust, the people have responded with overwhelming support. Across these five states, only the BJP and NDA retained their governments, returning with even greater support. This is not merely an electoral victory. It is the people of India placing their seal of approval on 'Modi's Guarantee.'

We salute the people of Bengal, Assam, Kerala, Puducherry, and Tamil Nadu. We offer our heartfelt congratulations to every BJP and NDA worker who toiled tirelessly to make this victory possible. We now take the pledge to serve with even greater responsibility and dedication, to live up to every expectation the people have placed in us. 'Sabka Saath, Sabka Vikas, Sabka Vishwas' — this is our mantra, and this is our path forward.

PIC TALK

A squirrel feeds on a blooming Gulmohar flower on a tree branch, in New Delhi.

PHOTO: PTI

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Why do some people remain intensely apolitical?

ASHA IYER KUMAR

2ND OPINION

My aged mother, living in one of the six states that went to the Assembly polls, was unsure if she would cast her ballot this time because of poor health. However, members of a certain party made arrangements for her commute to the polling booth, where she was told she could not vote. She had misplaced her Aadhaar card, and that stopped her from participating in the democratic process she had rarely missed. Yet she was not disappointed, for, in her words, "it doesn't matter who comes to power. They are all the same."

She and my late father had an allegiance to the Congress party and would show support to the "hand" regardless of who the candidate was. It had little to do with the party's ideology; they were not concerned about what the party had come to be. Their loyalty was rooted in history. For many people like me, national politics is not a staple. It is something we encounter in passing, in fragments-like news playing in a waiting room. For those who are deeply political, this may seem like indifference towards democracy or a lack of conviction about our right to choose how we are governed. It is not so. For many who consider themselves apolitical, the distance arises from confusion, disillusionment, and fatigue.

It brings to mind George Orwell's Animal Farm, where the promise of equality and justice slowly slips into moral compromise, exposing the decay within political systems. In recent times, we have seen new entrants like AAP promise clean governance and change. Yet, over time, principles appear diluted amid accusations and defections, leading to crises of credibility.

This raises a difficult question: is clean governance, or even change itself, sustainable in a world that quietly prioritises self-interest over public good? The recurring cycle of hope and disappointment reinforces the belief that "all are the same", keeping many at a distance from political engagement.

At the same time, we live in an era where a film star can become a political force almost overnight — not necessarily because of governance credentials, but due to mass appeal. Vijay's entry into politics in Tamil Nadu reflects this ongoing fusion of cinema and politics. Whether this marks a meaningful shift or simply adds to the spectacle remains to be seen.

For many citizens, what matters most is stability. Who governs is less important than how governance affects daily life. People care about whether their lives become easier, safer, and more secure. Ideology matters, but only when it translates into tangible outcomes. Without that, party names and positions lose significance.

Being ideologically neutral does not mean being uninformed or indifferent. For many, it is not an absence of thought but a refusal to be confined by rigid political identities. Parties demand alignment, but individuals often live with contradictions. One can value secularism while also advocating equality; these are not mutually exclusive.

When political systems force binary choices, those who prefer nuance often step back-not from issues, but from the pressure to conform. They are not anti-political, merely less vocal. They understand that thoughtful engagement does not always need to be loud or polarised.

The writer is a Dubai-based author, columnist, independent journalist and children's writing coach

NOTIFIABLE STATUS FOR LEPROSY CAN IMPROVE EARLY DETECTION

Apropos "Government set to declare leprosy a notifiable disease" (*The Pioneer*, May 2), Delhi will become the sixth state after Maharashtra, Karnataka, Tamil Nadu, West Bengal and Uttarakhand to make the disease notifiable.

This step will strengthen surveillance, help control transmission, enable early diagnosis, improve treatment compliance, and reduce stigma. Effective management of leprosy, along with ensuring free drugs to the needy, could be significantly bolstered by this move.

Leprosy is a chronic disease which, if diagnosed and treated promptly, can be completely cured. Notification should promote easier access to drugs for all patients. Although India was declared a "leprosy-free" country in 2005, in line with World Health Organisation standards of less than one case per 10,000 population, the disease continues to be reported in several parts of the country. Making it notifiable will require every doctor treating a patient to report the case to the district leprosy officer, ensuring proper monitoring and follow-up.

The remaining states should follow the example set by Delhi and the five others in making leprosy notifiable.

The WHO has strongly recommended including the disease in the notifiable list to improve public health outcomes. Such a coordinated approach will be crucial in moving closer to the complete eradication of leprosy in India.

GANAPATHI BHAT | AKOLA

Please send your letter to the info@dailypioneer.com.
In not more than 250 words. We appreciate your feedback.

LETTERS TO THE EDITOR

Reels craze turns deadly

An adventure turned into a horrifying misadventure for a team of five youngsters in Uttar Pradesh's Siddharth Nagar, who climbed atop a water tank to shoot reels, once again reminds us how today's youth ignore precautions and risk their precious lives for social media attention.

The accident occurred when the stairs collapsed and three children fell from the structure, killing one, seriously injuring two, and leaving two others stranded atop the tank. They were later rescued in a joint operation involving the fire department and the Indian Air Force, which airlifted them to safety. Present-day youth love adventure, challenges, and new horizons. However, it is alarming that in their quest to make an impression, many chase reels and selfies, often risking their lives by attempting dangerous feats. What they forget is the fatal risk involved in such actions, endangering not only themselves but also causing immense distress to their families. Parents and teachers have a vital role to play and must guide them to avoid such life-threatening risks. A reckless attempt to film social media reels atop a water tank in Siddharth Nagar turned tragic, exposing how the youth's pursuit of online attention often comes at the cost of safety and life.

M PRADYU | KANNUR

When development destroys nature

Industrialisation cannot be allowed to bulldoze ecological truth, especially in a fragile and irreplaceable region like the Nicobar Islands. These islands are not empty land banks waiting for corporate occupation; they are living, breathing ecosystems rich in biodiversity, deeply rooted indigenous cultures, and nature's own defence against climate catastrophe.

Yes, development is necessary. But a model of growth that destroys forests, uproots indigenous communities, and weakens climate resilience is not development; it is exploitation legitimised by policy and powered by profit.

When voices rise against deforestation, they are not obstacles-they are the conscience of democracy. Silencing them is not governance; it is the erosion of accountability. True democracy thrives not on blind approval, but on informed resistance. The forests of the Nicobar Islands are not expendable assets. They are shields against cyclones and rising seas, lifelines for indigenous communities, reservoirs of rare flora and fauna, and pillars of ecological balance. To justify deforestation in the name of industrialisation is to gamble recklessly with our collective future. When forests fall, civilisations do not rise — they collapse.

BRUHASPATI SAMAL | BHUBANESWAR

Diplomacy needs responsible language

US President Donald Trump recently reposted on social media a commentary by American radio host Michael Savage, in which Savage described India and China as "hellholes". India rightly termed the post "uninformed, inappropriate and in poor taste" — a rather mild response to such offensive language. Trump ought to exercise greater caution in his public remarks. The US President has frequently used outlandish language to describe foreign nations and leaders. Recently, he also targeted Canada, a long-standing ally. In early 2026, he criticised Prime Minister Mark Carney, calling him "ungrateful" and claiming Canada depended entirely on the United States. Carney responded firmly, stating that Canada "thrives because we are Canadian".

Trump's remarks on Greenland and his rhetoric following the death of Ali Khamenei further strained global sensitivities. His aggressive posturing, alongside actions involving Benjamin Netanyahu, has drawn criticism worldwide. Even Luiz Inácio Lula da Silva cautioned that Trump was "not elected to be emperor of the world".

Such language undermines diplomacy and global respect.

HARIDASAN RAJAN | KOZHIKODE

The forgotten martyrs: India's forest guards are dying to save the forests

There is no uniform, no applause, and often no backup. Deep inside India's forests, far from public view, frontline foresters — guards, rangers, and wardens — fight a relentless war against timber smugglers, mining mafias, and armed poachers, even as they confront wild animals and unforgiving terrain

VK BAHUGUNA

Forest protection is becoming a real challenge for frontline field foresters like Forest Guards, Rangers, and Wildlife Wardens in view of emerging, well-coordinated mafias with the latest superior weaponry. Over the last 30 to 35 years, thousands of forest personnel have lost their lives to protect natural resources all over the world. India is frequently cited by the International Ranger Federation (IRF) as the most dangerous country for foresters. In a typical three-year period, IRF statistics have shown that India accounts for nearly 30-40 per cent of all global forester deaths. India has the highest number of forest staff fatalities in the world, with reports highlighting hundreds of injuries and deaths in the line of duty. Between 2012 and 2017, India accounted for nearly 31 per cent (162) of the 526 forest ranger deaths reported globally. Compared to this, between 2006 and 2021, the IRF recorded approximately 2,351 casualties across 82 countries.

Thus, thousands of foresters' lives are lost in the line of duty due to attacks by timber smugglers and poachers; conflicts with elephants, tigers, leopards, and other wild animals during patrolling; and occupational hazards such as forest fires, malaria, and water-borne diseases. Not only frontline staff but also senior IFS officers like DFOs, Conservators, and National Park Directors have been killed in India.

P Srinivas, a 1979 IFS officer, who was beheaded by the sandalwood smuggler Veerappan in 1992, is now an icon of civil service sacrifice for the sake of duty, and at the Lal Bahadur Shastri Academy and other such academies, a P Srinivas Memorial Lecture is arranged every year during the foundation course of civil servants by the Government of India. P Srinivas was awarded the Kirti Chakra for his sacrifice. Similarly, Sanjay Singh, a 1992 batch IFS officer and DFO Rohtas, was killed by Maoists in February 2002.

Apart from foresters, large numbers of local people are also killed by wild animals in conflicts. Over the last 25 years, 1,296 people were killed by animals, mostly in recent years. In Uttarakhand alone, during 2025, 40 people were killed by leopards and 72 were attacked by bears. In this article, however, I want to discuss more about the problems of forest department staff because, if remedial measures are taken, then attacks on locals will also be reduced.

Members of the IFS, as also other ranks, work in difficult areas where civic facilities are poor, and they have to battle organised timber and mining mafias and well-equipped wildlife poachers with very primitive tools, while the mafias are equipped with advanced gadgets and weapons. When personnel are killed or seriously injured, they are left to their own fate, and their families suffer ignominiously. Compensation from state governments is poor, delayed, and sometimes ignored completely.

The Indian Forest Service Association (IFS) took note of the pitiable conditions of such personnel and constituted the Indian Forest Service Benevolent and Welfare Trust (IFSBWT) to bridge that gap with immediate financial relief and to complement the support extended by the states. Initially, this was meant for IFS officers but has now been made applicable to all categories of forest personnel in the country.

The Trust was originally established in July 2008 by a group of Indian Forest Service officers in Delhi as a public charitable trust under the provisions of the Registration Act, 1908, so that bereaved families of IFS officers who die in harness can be assisted. Recently, it has been noted that largely frontline forestry personnel are killed or grievously injured while attempting to stop illegal mining, smuggling, encroachment, and poaching across several states; therefore, in January 2026, the Trust substantially widened its scope to include all frontline staff, as the majority of casualties and injuries occur mainly among Foresters, Guards, and Watchers, who are the real green warriors at the delivery point and the only line of defence for the country's forests.

Supporting these frontline warriors and their families was therefore made the foremost priority of the Trust. Accordingly, the Trust was re-registered on February 11, 2026, with an expanded mandate covering all categories of forestry field personnel in the country, from IFS officers to Forest Guards and below.

Notwithstanding the attempts by the IFS Central Association, society and government must take the lead to ameliorate the pitiable working conditions under which Forest Guards, Foresters, and Rangers have to work in a hostile environment, which is more often than not made vicious by the political patronage of mafias, especially the mining mafia.

To address this issue and improve the welfare of "Green Soldiers", concrete measures need to be taken. First and foremost is to vest frontline staff with legal powers by granting forest officers the authority for the "minimal and proportionate use of force", similar to the police, to deter organised crime such as sand, timber, and poacher mafias.

Further legal protection should be provided against frivolous counter-complaints filed by offenders to harass forest staff. Amend state rules to provide Section 187 of BNSS protection to all field staff, ensuring they cannot be prosecuted for actions taken in the line of duty without prior government sanction. Second, provide modern and effective firearms and tactical training to field staff working in high-conflict zones so they are not outgunned by poachers.

Third, provide financial and social security by ensuring a minimum uniform ex gratia of at least ₹50 lakh for unnatural deaths in the line of duty across all states, and continuing their last drawn salary for the family of the deceased until the retirement date. In addition, the government must extend schemes like the PM Scholarship for children of deceased armed forces personnel to the children of forest martyrs.

Next is to ensure better infrastructure for frontline staff, as in the police, by improving remote forest beats with basic amenities such as potable water, electricity, and high-quality field gear like satellite phones, fast-moving, good-quality vehicles, drones, night vision, GPS, etc. A Forest Housing Corporation should be established in each state with 100 per cent grants from the Central Government on the same pattern as in the police department. Immediate access to emergency medical support and air evacuation for staff injured in remote areas must also be ensured.

Last but not least is to institute the President's Green Gallantry Medals specifically for foresters, on a par with police or military medals, to boost morale and public respect for the service.

On the organisational front, it is necessary to separate protection and enforcement from development and silviculture. States need to create dedicated anti-poaching and protection units at the division level.

These teams should consist of physically fit, tactically trained personnel whose only job is patrolling and enforcement, leaving plantation and other work to a separate administrative wing. States also need to create an intelligence wing at the range level to build an intelligence network.

The Ministry of Environment and Forests needs to take up these suggestions on a war footing, as the country's ecological warriors can only be neglected at the peril of destabilising food, water, and ecological stability.

The Pioneer
SINCE 1865

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The mindshifts behind Ujjwala's decade of change

NIDHI PRABHA TEWARI

As Pradhan Mantri Ujjwala Yojana completes a decade, its relevance goes beyond its metrics. For policymakers elsewhere, the key question is not just what was achieved, but how a system constrained by inertia began to move at scale. The answer lies in a set of fundamental mindshifts — what the Causing Incredible Performance framework calls Reset Mind: identifying and altering the thoughts that limit action. Ujjwala shows that when the way a problem is seen changes, execution follows-offering a practical lens for large-scale policy design.

1. From scarcity to abundance

For decades, clean cooking fuel was treated as a scarce, urban-oriented resource. Access was rationed and expansion cautious.

Ujjwala flipped this. It operated from a stance of abundance-that clean energy access could be expanded rapidly and equitably. This enabled a shift from incrementalism to ambition, from "how much can we give" to "how many should we reach". Scale became possible because the mental ceiling was lifted before the operational one.

2. From 'available biomass' to valued outcomes

In rural contexts, biomass was seen as a sufficient basis for cooking energy. Improved cookstoves and biogas were promoted, but adoption remained limited.

Ujjwala forced a more fundamental question: what outcomes matter-time saved, health improved, dignity enhanced?

Reframing the issue in terms of outcomes made it possible to see LPG not as a replacement for tradition, but as an enabler of new choices. Biomass, in turn, could be used differently.

3. From inevitability to intentionality

A persistent belief in large systems is that change will happen gradually-through rising incomes or education. Yet before Ujjwala, LPG adoption in rural areas remained slow.

PMUY shifted this from passive expectation to deliberate action-setting ambitious goals, mobilising supply chains, and driving adoption with urgency. This move-from inevitability to intentionality-explains the leap from stagnation to visible change.

4. From untargeted subsidies to smarter targeting

A key hesitation was whether another subsidised scheme would strain public finances.

Prior groundwork through PAHAL-direct benefit transfer, de-duplication, and better targeting-enabled more prudent subsidy management. This helped address fiscal concerns while enabling expansion at scale.

5. From doubts about readiness to confident adoption

Safety concerns were real: would first-time users-often in fire-prone homes-handle LPG safely? LPG expands nearly 250 times when released, creating a flammable cloud.

What followed challenged this assumption. As households adopted LPG, they learned to use it safely. Oil marketing companies invested in user education, and the widespread presence of the red cylinder built shared community knowledge. Along with a robust product, this enabled a shift from fear to confident adoption.

6. From affordability concerns to gradual adoption

Affordability was another concern: would households pay for refills, especially when women are not always decision-makers? Should cheaper alternatives come first?

Ujjwala resisted creating a lower-tier product, offering instead the same LPG system used by the middle class.

Adoption has been gradual. Many households began using LPG selectively-during illness, for guests, or in adverse weather-before integrating it into daily cooking. Others transitioned faster; some still face constraints. Over time, LPG has found a place in household budgets. Refill rates have risen from about 3 to around 5 cylinders annually, supported by smaller cylinders, financing options, and better last-mile delivery.

Conclusion: Policy as a function of perception

These shifts point to something deeper than a successful scheme: policy outcomes are shaped by the thoughts that precede them.

The scale and direction of Ujjwala were driven by a decisive shift in thinking at the highest levels. Leadership from PM Shri Narendra Modi and the then Petroleum Minister Shri Dharmendra Pradhan helped reframe clean cooking as a national priority anchored in dignity and access. This reset was carried forward by public sector oil marketing companies, their distributor networks, and frontline functionaries, along with women on the ground, who translated intent into execution.

It also reframed women from passive beneficiaries to customers, raising expectations and improving service delivery.

As India designs future interventions-in energy, health, or livelihoods-the lesson is clear: execution improves when perception shifts. The goal is not to prescribe a single path, but to understand which interventions deliver faster, larger, and more valued outcomes-and under what conditions.

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Defection by design: How the 'merger' clause is reshaping Parliament

ABHINAV K SHUKLA
ABHINAV NARAYAN JHA

A recent political development in the Rajya Sabha has once again exposed a constitutional paradox that has long remained under-examined. Seven Members of Parliament belonging to the Aam Aadmi Party-six representing Punjab and one representing Delhi-have shifted allegiance to the Bharatiya Janata Party. Numerically, this constitutes more than two-thirds of the party's strength in the House, thereby attracting the "merger" exception under the Tenth Schedule of the Constitution of India. Constitutionally, the recognition of this shift by the Chairperson is unassailable. Normatively, however, it raises a deeper question: has the law, in preserving stability, diluted representation?

The anti-defection framework, introduced through the 52nd Constitutional Amendment in 1985, was designed to combat political opportunism and ensure party discipline. It sought to prevent elected representatives from betraying the mandate on which they were elected. Yet, it also carved out an exception: where not less than two-thirds of a legislature party agree to a merger, disqualification would not follow. This exception, found in Paragraph 4 of the Tenth Schedule, was conceived as a pragmatic safeguard, recognising that political realignments at the party level may sometimes be legitimate.

However, what appears doctrinally sound begins to fray when tested against the institutional role of the Rajya Sabha. Unlike the directly elected lower house, the Rajya Sabha is not merely a chamber of political contestation; it is a federal institution. It is designed as the Council of States, a forum where states, through their indirectly elected representatives, participate in national lawmaking. Members are elected by state legislative assemblies, embedding within them a fiduciary obligation to articulate state-specific concerns in the Union legislature.

This design reflects a carefully calibrated constitutional vision. India may be described as a "Union of States", but its parliamentary architecture ensures that states are not rendered voiceless in national decision-making. The Rajya Sabha acts as a deliberative check on the Lok Sabha, scrutinising legislation and, in many cases, serving as the final gatekeeper. No ordinary legislation can become law without its assent; constitutional amendments require its concurrence by a special majority. In matters affecting the federal balance, the Constitution goes even further, mandating ratification by at least half of the states under Article 368 of the Constitution of India.

Against this backdrop, the recent shift assumes a different character. Punjab sends seven members to the Rajya Sabha. These members were elected by a state legislature led by the Aam Aadmi Party, reflecting a particular political mandate within the state. Their role, therefore, extended beyond partisan alignment; they were expected to serve as the voice of Punjab in national deliberations, especially where central legislation might affect state interests.

When six out of these seven members realign with the ruling party at the Centre, a structural tension emerges. Can representatives, elected through one political mandate within a state, effectively discharge their representative function after aligning with a different political formation, particularly one that governs at the Union level? More pointedly, can they meaningfully oppose or scrutinise the very executive they now politically support?

The anti-defection law offers a formal answer: yes. By treating such a shift as a "merger", it immunises these members from disqualification. But this legal fiction-that a legislative supermajority necessarily reflects a genuine party merger-deserves closer scrutiny. In practice, what is being recognised is not always the merger of political parties at the organisational level, but rather the coordinated defection of legislators. The distinction is subtle but constitutionally significant.

The original intent behind the merger exception was to accommodate situations where an entire political party, as an organisational entity, decides to merge with another. The two-thirds threshold was introduced to address a practical concern: what if a faction of legislators resists such a decision? The Constitution sought to protect both collective political strategy and individual legislative autonomy. It did not intend to provide a route for large-scale defections that leave the original party structure intact but hollowed out within the legislature.

This is where the present episode becomes instructive. The constitutional mechanism has operated correctly; the outcome, however, appears to strain the spirit of the provision. What we witness is not merely a shift in party numbers, but a potential erosion of the federal voice that the Rajya Sabha is meant to embody.

The deeper concern, therefore, is institutional rather than partisan. If the composition of a state's representation in the Rajya Sabha can be effectively transformed mid-term through the merger exception, the link between state mandate and parliamentary voice becomes attenuated. The Council of States risks becoming, in effect, a chamber of shifting political loyalties rather than stable federal representation.

This is not to argue for an absolutist anti-defection regime. Political mobility and realignment are intrinsic to a democratic system. But when constitutional provisions designed for stability begin to undermine representational integrity, a recalibration becomes necessary. One possible approach is to revisit the interpretation of "merger" to require demonstrable organisational integration between parties, rather than merely a numerical threshold within the legislature. Another is to reconsider whether members elected to represent states should be held to a higher standard of accountability in cases of political realignment.

Ultimately, the question is not whether the law has been followed-it has. The question is whether the law, as currently structured and interpreted, continues to serve the constitutional vision it was meant to uphold. In the quiet arithmetic of two-thirds, we may be witnessing the gradual dilution of something far more substantive: the voice of the states in India's parliamentary democracy.

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Modi's triumph

The unfolding verdict in West Bengal tells us several things, but most important of these is the fact that the charisma of Prime Minister Narendra Modi now extends to the one state that had long eluded the grasp of his party. This will arguably be counted by the Bharatiya Janata Party as the most significant assembly triumph in its history, one for which Mr Modi can justifiably claim credit. As the party cements its national dominance under the Prime Minister, the fact that Bengal was the home of the Jana Sangh's founder, Dr Syama Prasad Mookerjee, will be icing on the cake.

It also tells us of the exhaustion of a political formula that once appeared unassailable, one that saw Mamata Banerjee and her Trinamool Congress build an electoral coalition that blended welfare delivery, subaltern mobilisation, and minority consolidation into a formidable machine.

At the heart of this shift lies a deeper transformation: the replacement of transactional welfare politics with identity-driven consolidation. The rise of the BJP in the state has not been incremental; it has been structural. Its success appears rooted in converting a fragmented Hindu electorate into a more cohesive political bloc ~ something Bengal's Hindus had historically resisted, even though Muslims generally voted as a block. This is significant because Bengal, unlike many northern states, long prided itself on a political discourse shaped by class, language, and ideology. Electoral contests were anchored in redistribution, governance failures, and local grievances. That grammar now seems to have yielded to a different vocabulary ~ one in which identity outweighs delivery. In this transformation, too, it is the personality of the Prime Minister that has tilted the scales.

Equally revealing is the apparent decline in the persuasive power of welfare schemes. Cash transfers and targeted benefits appear to have reached a saturation point. Voters who accepted state support no longer feel bound by it.

The fragmentation of the minority vote, if sustained, adds another layer to this transformation. For years, electoral predictability rested on a consolidated minority bloc. A breakdown in this predictability introduces volatility into the system, making outcomes less about fixed loyalties and more about shifting perceptions of viability and change.

What emerges, then, is a convergence of three forces: identity consolidation, welfare fatigue and anti-incumbency crystallising into a desire for systemic reset. None of these alone would have sufficed. Together, they create the conditions for a political rupture. The larger implication extends beyond Bengal. If a state with such a distinct political culture can undergo this shift, it signals a broader national trend where electoral behaviour is being reshaped by narratives that transcend local governance metrics. It also raises questions about the future of regional parties whose strength lies in finely calibrated social coalitions rather than overarching ideological appeal.

For Trinamool, the lesson is stark: political capital built on delivery must continuously renew its moral legitimacy. For the BJP, the challenge begins after victory ~ whether it can convert electoral consolidation into governance that meets the expectations it has helped create.

Shifting Mandates

The results emerging from Tamil Nadu, Assam, Kerala, and Puducherry do not point to a single national trend. Instead, they reveal a fragmented political landscape where different forces are consolidating power in different ways, often simultaneously and sometimes contradictorily. The temptation to read these elections as a referendum on national leadership would be misplaced. What they demonstrate is something more complex: India's electoral politics is becoming increasingly regional in expression even as it remains nationally consequential in impact.

The most dramatic rupture is unfolding in Tamil Nadu. The rise of actor Vijay and his Tamilaga Vettri Kazhagam signals more than electoral upset; it marks a structural break in a political system long dominated by the Dravida Munnetra Kazhagam and the All-India Anna Dravida Munnetra Kazhagam. For decades, Dravidian politics defined the state's ideological and organisational framework. The emergence of a personality-driven alternative, propelled by youth and urban voters, suggests that this framework is no longer sufficient to contain political aspirations. Tamil Nadu may be entering a post-Dravidian phase, where charisma and narrative compete with legacy and structure.

In Assam, the Bharatiya Janata Party appears set to secure a third consecutive term under chief minister Himanta Biswa Sarma. This is not merely a routine re-election. It reflects the party's success in embedding itself structurally within the state - through organisational depth, targeted welfare delivery, and a narrative that combines development with identity politics. The opposition, led by the Indian National Congress, has struggled to present a coherent counterweight, suggesting that Assam has moved beyond competitive alternation to a phase of political consolidation. Kerala presents a contrasting picture. Here, the Congress-led alliance is poised to unseat the Left government headed by Pinarayi Vijayan. The shift underscores the enduring potency of anti-incumbency in a state where electoral cycles have historically been defined by alternation. Yet this is not merely cyclical change. As the Left loses its last significant bastion of power, it raises deeper questions about the future relevance of communist politics in India. At the same time, the Congress's resurgence remains geographically limited, offering revival without dominance.

Puducherry, by contrast, offers continuity. The return of N. Rangasamy reflects the persistence of localised leadership and governance credibility. Here, electoral outcomes are shaped less by ideological contestation than by administrative reputation and alliance management. This divergence also reflects a deeper voter behaviour shift: citizens are increasingly separating state and national choices, rewarding performance locally while keeping broader ideological preferences intact. The era of uniform electoral swings is giving way to layered, context-specific mandates across India.

Taken together, these outcomes resist any neat national narrative. The BJP consolidates where it is already strong; the Congress recovers where conditions favour it; and regional formations continue to evolve, sometimes dramatically. Indian politics is becoming more asymmetrical ~ defined by multiple, overlapping mandates that reflect the country's diversity rather than resolve it.

A flawed system

The investigative machinery remains deeply compromised, shaped more by political control than by professional standards. Police continue to be rude, poorly trained, and governed by the colonial Police Act of 1861, a statute designed to protect rulers rather than serve citizens, zealously preserved by successive governments. Transfers are wielded as instruments of reward or punishment, ensuring that officers who toe the political line are promoted while those who act independently are sidelined

India, proud of its dynamic democratic credentials, has over the years allowed a criminal justice system to develop that shields the accused far more than it supports victims or protects witnesses ~ an unfair imbalance left unchecked as reform proposals have consistently failed to see the light of day.

The vibrancy of its elections, the scale of citizen participation, and the resilience of its democratic institutions are undeniable, yet these strengths have not translated into a justice framework that inspires equal confidence. The imbalance remains stark: while the accused, especially the powerful, find protection in procedure and delay, victims and ordinary citizens are left waiting for fairness that often never arrives.

The principle of presuming innocence was meant to safeguard liberty, but in India it has morphed into a shield for the powerful. Legislators with criminal records contest elections while trials drag on.

Over 40 per cent of MPs face criminal cases, including murder, kidnapping and crimes against women. This is no aberration but a structural imbalance that corrodes faith in justice and turns lawmakers into lawbreakers. When those accused of grave crimes continue to legislate, the system itself stands accused of complicity.

The bail system illustrates this imbalance vividly. Bail is supposed to prevent arbitrary detention, but in reality it is a privilege of the rich and influential. High-profile controversies in recent years, including the cancellation of bail for Olympian Sushil Kumar in 2025, have shown how liberty can be misused to intimidate witnesses and obstruct justice. Yet countless political figures continue to exploit bail provisions, walking free while victims wait endlessly for closure.

The poor, meanwhile, languish in jails as undertrials, unable to furnish sureties or navigate the complex procedures. The National Crime Records Bureau reported in 2025 that nearly three quarters of prisoners were undertrials, amounting to close to four lakh individuals. Many languish longer than the maximum sentence for their alleged offences.

Custodial deaths in Uttar Pradesh's Pratapgarh and Sultanpur jails in April 2026 underline the human cost of delay and neglect. Overcrowding in prisons has crossed 120 per cent occupancy, and nearly half of undertrials are aged between 18 and 30, showing how the young are disproportionately trapped in the system. The contrast between the liberty enjoyed by the powerful and the confinement suffered by the poor is stark and corrosive.

Conviction rates remain dismal. While specialised agencies like the National Investigation Agency boast over 90 per cent conviction in terror cases, the overall conviction rate for ordinary crimes hovers around 20 to 25 per cent, far below global standards. This means acquittals are the norm, not the exception, eroding public faith in justice.

The Jessica Lal case, where a model was shot in front of 100 witnesses yet the accused initially walked free, exposed how money and muscle power can bend justice. Priyadarshini Mattoo's murder trial revealed how faulty investigations forced a judge to acquit a man he believed guilty.

The Best Bakery case showed how witnesses were coerced into silence. The Nithari case revealed how poor families begging for help were brushed aside by police, while the child of a corporate executive received immediate attention.

These cases are not relics of the past; they are symptoms of a system that continues to favour the accused over the victim. Each case demonstrates how the presumption of innocence, when stretched beyond reason, becomes a licence for impunity. The message to society is clear: if you have money, muscle, or political patronage, the law bends in your favour.

Victims in India are reduced to mere pieces of evidence. Their suffering is ignored, their rights to reparation sidelined. Witnesses fare no better. They are threatened, bribed, or abandoned.

In January 2026, the Supreme Court clarified that witness intimidation, under Section 398 BNSS, is a cognizable offence, allowing police to register FIRs directly. Yet statutory protection remains weak. Witnesses continue to turn hostile, victims continue to be sidelined, and justice continues to be delayed.

The Bharatiya Nyaya Sanhita and Bharatiya Nagarik Suraksha Sanhita, enacted in 2023, introduced provisions against false evidence and witness intimidation, even mandating electronic summons and digital recording of statements. But without enforcement, these remain cosmetic. The Bharatiya Sakshya Adhiniyam recognised electronic and digital records as primary evidence, reducing reliance on oral testimony, but this has not translated into stronger protection for witnesses or faster trials.

S S SAXENA

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The reality remains that witnesses are left vulnerable to threats, inducements, and coercion, and victims are left to fend for themselves in a system that treats them as incidental. In other democracies, witness protection is statutory and robust, with relocation programmes and anonymity provisions. India's failure to provide similar safeguards is a glaring omission.

The investigative machinery remains deeply compromised, shaped more by political control than by professional standards. Police continue to be rude, poorly trained, and governed by the colonial Police Act of 1861, a statute designed to protect rulers rather than serve citizens, zealously preserved by successive governments. Transfers are wielded as instruments of reward or punishment, ensuring that officers who toe the political line are promoted while those who act independently are sidelined.

The Malimath Committee in 2000 sought stronger prosecution, victim rights, and modernised investigation, while the Padmanabhan Committee urged separation of policing from investigation and insulation from political interference. Yet their clear recommendations never resonated with the political establishment, and both reports have gathered dust for over two decades.

This refusal to implement reform is deliberate, for politicians benefit from a police force that can be manipulated, investigations that can be stalled, and prosecutions that can be weakened. Comparative experience shows that countries which separated investigation from law-and-order policing achieved higher conviction rates and greater public trust, while India's conscious choice to resist such change has preserved patronage at the cost of justice.

Delay has become the bane of Indian justice. With over five crore cases pending, unfilled judicial vacancies, and adjournments granted on flimsy grounds, victims wait decades while accused exploit delay to contest elections, intimidate witnesses, or simply outlive trial. The maxim that ten guilty may go free rather than one innocent suffer has been stretched to absurdity.

Miscarriage of justice now arises as much from acquitting the guilty as convicting the innocent. Indulgence toward the accused has bred a culture where crime pays and lawbreakers thrive as lawmakers.

Reform is urgent: expand the number of courts, both fast track and regular, alongside stricter limits on adjournments and accountability for delay. Without this, the backlog will swell and justice remains a distant dream. Other nations dispose of corruption and election cases within a year; India's refusal to adopt similar timelines betrays a lack of political will.

The imbalance can be corrected, but only with political will and systemic reform. More fast track and mediation courts, plus summary trials, must be introduced to clear petty offences quickly, freeing judges to focus on serious crimes. Independent investigative police streams must be created at district levels, modernised with technology, and freed from political control.

Candidates with framed charges must be disqualified to break the nexus of crime and politics. A statutory witness protection scheme must be enforced with real teeth, not cosmetic provisions. Legal education and aid must be expanded for the poor to prevent undertrial exploitation and empower citizens. Only by enlarging judicial capacity, curbing adjournments, and holding judges accountable for delays can justice move from promise to reality.

Despite repeated committees and new reformative laws, the ultimate aim of improving the quality and timeliness of justice remains elusive. Until political influence is severed from investigation and custody, no reform can truly succeed.

It may sound ambitious, but there is no other way out - justice cannot flourish while politics controls police and prosecution and as a result 'justice will not be only delayed but will also be destroyed'.

India cannot afford a justice system where victims are abandoned, witnesses silenced, and undertrials forgotten, while the accused ~ especially the powerful ~ exploit loopholes to walk free. Justice must protect the innocent, but it must also punish the guilty. When lawmakers wear the cloak of lawbreakers, justice itself stands accused and the people are left unprotected.

The Korea Herald

Politics over policy

Ha Jung-woo, senior presidential secretary for artificial intelligence policy and future planning, resigned on Tuesday to run in a National Assembly by-election to be held alongside the June 3 local elections.

It was reported that Jung Chung-rae, leader of the ruling Democratic Party of Korea, met with Ha two days earlier to persuade him to run and that Ha replied that he would think it over. The party is expected to nominate him as its candidate for a constituency in Busan.

It is unsettling in many ways that a presidential aide responsible for a key national strategy is suddenly entering the electoral arena.

President Lee Jae Myung has emphasized his vision for AI since his presidential campaign. He laid out a blueprint to invest a combined 100 trillion won ($68 billion) from the public and private sectors by 2030 to elevate South Korea into one of the world's top three AI powers. In June last year, he established the Office of Artificial Intelligence Policy and Future Planning at Cheong Wa Dae and made the unusual choice of appointing Ha ~ who had led AI innovation at Naver ~ to head the office.

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At the launch ceremony of the Presidential Council on National Artificial Intelligence Strategy in September last year, Lee described the vision as "a core survival strategy that will determine the future of South Korea." Ha said that the next three to five years would be the golden age of South Korea's AI industry and stressed the importance of formulating and carrying out mid- to long-term AI strategies.

Yet after not even three years, but just 10 months on the job, he stopped his work to run for an Assembly seat ~ with a mountain of work still left to do. When reports surfaced earlier this month that the party wanted Ha to run in the election, Lee appeared to pump the brakes on the idea, saying at a public Cheong Wa Dae meeting on April 9, "Ha should not give in just because requests related to running in the election come in." In response, Ha made remarks that seemed to rule out a potential candidacy, but those words ultimately proved to be empty rhetoric. It is unclear whether Jung's pressure was too strong or whether Ha himself was eager to run, but he should have given more thought to the nation's long-term interests than to the election at hand. The AI secretary is key to the command center of the administration's ambitious push for a national strategy. This is all the more true at a time when major advanced countries are racing to accelerate technological development so as not to fall behind in AI, a field that will shape the future.

Ha has no political experience at all, and whether he wins or loses will not affect the Democratic Party's majority status in the National Assembly. Nevertheless, the party pushed for his candidacy for the sake of politics rather than the success of a national strategy, and the president accepted his resignation. It is regrettable and frustrating that party interests and political calculations are being placed above a strategy tied to the nation's future.

There is nothing new about presidential aides running for office. Experience as a presidential aide can be quite helpful in carrying out legislative duties.

Letters To The Editor | editor@thestatesman.com

Brown Sahibs

Sir, The perspective page article on Indian education published today overlooks the deep-seated intellectual colonization that still governs our schools, colleges, universities. Our system remains a prisoner of 19th-century thought, shaped by figures like Macaulay, John Stuart Mill, and Karl Marx, who held at best a vague understanding, and at worst a total contempt, for ancient Indian knowledge systems. While Henry Derozio's radicalism is often credited, the structural bias against indigenous pedagogy is a direct legacy of this Western triumphalism.

As William Dalrymple notes in his recent book The Golden Road, to get ahead, Indians were forced to "abandon, or at least sublimate, much of their own culture," becoming "English-speaking 'Brown Sahibs'." This mentality persists at home, where education is treated as a race for social status. Parents frequently ignore a child's natural aptitude, steering them toward "flavour of the day" subjects purely for competitive rank, further entrenching this colonial "sublimation."

Ironically, the modern quantum revolution, which emphasizes a holistic and interconnected reality, is far more in consonance with Swami Vivekananda's scientific approach to education than our current reductionist model. We must stop producing "Brown Sahibs" and start nurturing individuals who can bridge the gap between cutting-edge science and our owners of profound philosophical heritage.

Yours, etc., Sindhunil Barman Roy,
Belur, 30 April.

Collateral cost

Sir, The editorial "Diplomacy Abandoned", published today, correctly identifies what is happening in the US-Iran standoff as a shift from negotiation to coercion.

Washington's decision to pull back from backchannel talks while maintaining a naval presence around the Strait of Hormuz is a calculated bet ~ that material pressure will achieve what mediated dialogue has not. It may work. It may also harden Iranian domestic opinion against any settlement that carries the appearance of surrender.

The situation places Pakistan in a particularly uncomfortable position. Having invested diplomatic credibility in facilitating talks, it now finds itself sidelined not because it failed but because the principal actor lost interest in the process.

That is the recurring frustration of middle-power diplomacy, and it underscores why regional frameworks for conflict resolution need institutional depth beyond the goodwill of individual mediators.

For the rest of the world, especially energy-dependent economies like India, the

coercive pause described in the editorial is not a reassurance. Calibrated tension that avoids full-scale war still keeps oil prices elevated and supply chains uncertain.

A negotiated reopening of Hormuz, even a partial one, remains in everyone's practical interest. The pressure strategy may force Iran's hand, but the collateral cost is being borne quietly by countries with no voice in the outcome.

Yours, etc., A Myilsami,
Coimbatore, 30 April.

How the Great Nicobar project benefits India

HARSHA KAKAR

Since the much-hyped visit of the leader of the opposition, Rahul Gandhi to Andaman and Nicobar, amidst multiple state elections, to protest against the Great Nicobar project, the issue has gained traction, with members of his party backed by a few environmentalists, Western activists, leftist online journals, and influencers raising similar concerns. Chinese-backed global handles are singing the same tune. The project was mooted in 2021 and has begun gaining speed as all clearances to commence it are almost complete.

The chairperson of the Congress, Sonia Gandhi, wrote an op-ed against the project in September last year. All objections including her article, have tilted towards ecological damage, delicate bio-diversity, and displacement of two tribal communities, Nicobarese and Shompen, who number around 200. No one criticizing the project has offered any viable alternative.

With all singing the same tune, it sends a message that these protests and objections are designed to benefit China, which is most affected and desperate to stall it. There has been no comparison of perceived ecological damage versus strategic benefits, which could accrue once the project is completed.

If only ecological considerations were paramount, India's construction of roads and tunnels in ecologically sensitive border regions of Ladakh and Arunachal would have faced protests from the same political elements and their activists. The only one to object to construction along the borders, on ecological grounds, was Sonam Wangchuk, whose concerns were limited to Ladakh. The reason why it did not happen is because border infrastructure does not have the same global impact, including on China, as the Great Nicobar project.

India, for decades, concentrated on its land borders, strengthening its defences against both China and Pakistan, ignoring exploitation of its geography to gain dominance in other domains. The Indian Navy was also growing steadily and is now a dominant power in the Indian Ocean. The world has witnessed how Iran exploited its geography to contain the oil trade through Hormuz, throwing the global economy into doldrums.

The Nicobar project, once completed, would have the same impact and enhance India's ability to counter its threats. The project envisages the construction of an international container transhipment terminal, a dual use airport, power infrastructure and a planned township at Galathea Bay. It would also be a naval base.

The project's military intent is to enhance the ability of the armed forces to monitor international shipping lanes, improve response time and reduce commercial dependence on foreign transhipment hubs. The project is expected to cost between Rs 80,000 to 1 lakh crore. There is already a naval air station in the region, INS Baaz, designed for maritime vigilance, which would become a part of the project.

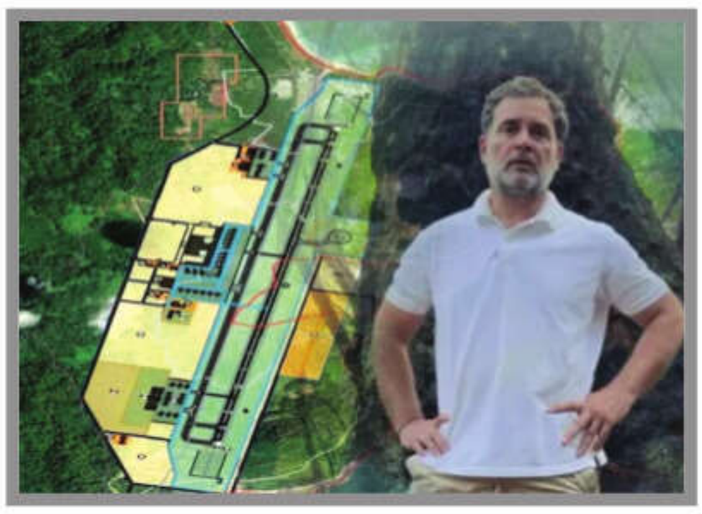
The Great Nicobar Islands straddle three channels, Duncan's Passage, Ten-degree and Six-degree Channels. The Six-degree channel is 163 km wide and separates the island from Indonesia's Aceh province. It is the route taken by large container ships and tankers to enter the Malacca straits, which is just about 2.5 km wide at its narrowest point. For China, this waterway is dubbed as the 'Malacca Dilemma' as 70 per cent of its oil transits this route, open to interdiction by India in case of hostilities. The islands also oversee alternate but difficult navigational routes of Sunda and Lombok Straits. Sixty per cent of India's seaborne trade transits through the Malacca straits.

The islands are an ideal location for establishing a commercial transhipment hub as almost all merchant ships sail through the region. It is equidistant from Colombo, Singapore and Klang in Malaysia, which currently handle over 70 per cent of India's transhipment cargo. Once this hub is established, it will bring immense savings to the nation. What is yet to be mentioned is that with its development, exploration for oil and gas in its vicinity will be undertaken.

To overcome the Malacca dilemma, China constructed ports and pipelines across Asia including in Pakistan and Malaysia. However, it still needs the straits and an Indian base at its mouth is a major threat. Militarily, the project will be a strong counter to the Chinese string of pearls as it would dominate routes taken by most of their shipping.

For ASEAN nations, the presence of India at the mouth of the Malacca Straits is a benefit. During the visit of their Prime Minister, Lawrence Wong, to India, in September 2025, Singapore supported India's interest in joining the Malacca Strait patrol to enhance maritime security. The joint statement mentioned, "Singapore acknowledges with appreciation India's interest in the Malacca Straits Patrol."

Multiple government agencies have studied the project and given approvals, including replanting trees being felled for the project. All precautions are being taken to ensure that the indigenous population and biodiversity are not impacted. A government press note mentioned: "Tribal welfare remains central, with no displacement proposed for Shompen and Nicobarese communities and a net increase in notified tribal reserve area through re-notification measures."



For India, these islands are an unsinkable aircraft carrier enabling projection of power deep into the Indian ocean. This is similar to China militarizing its islands in the South China Sea by constructing 3,000-meter runways, hardened hangers, missile shelters and advanced radar systems. Hence, China can have no objection to what India does on its own islands, despite it being a threat to their shipping. However, it can activate its paid agents to protest against the project.

Interestingly, protests are largely on grounds of ecology and a threat to the island's indigenous population without offering any alternate solution. The intent is clearly to stall it as with the Vedanta aluminium project. Those opposing the project have termed it as a scam involving the Adani group, even before the government has nominated any company for its construction. The project will also be objected to in parliament as recent comments by leaders of the opposition and paid influencers have failed to evoke any response from the government. It is unlikely that the government would heed to their demands.

The project construction will spread over 30 years. This is just the start. As it progresses, expect more protests and objections. In case during this period there is a change in government, there is a strong possibility that the project, essential for India's defence and economic security, could well come to a standstill, despite vast amounts having been sunk. The stalling would not be out of ecological or tribal considerations but possibly to reduce the military impact the project could have on India's adversaries. The construction therefore needs to be speeded up.

(The writer is a retired Major-General of the Indian Army.)

Maritime chokepoints reshape security

UPASHA KUMARI

Recent developments highlight how maritime chokepoints remain critical to both geopolitical contestation and geo-economic stability. In the Strait of Hormuz, through which a significant share of global energy trade transits, U.S. President Donald Trump indicated that naval forces have been directed to respond to potential mine-laying activities by Iranian vessels. This follows the seizure of a tanker linked to Iranian oil shipments and reported incidents involving Iran's Islamic Revolutionary Guard Corps and commercial shipping. Taken together, these developments signal a calibrated escalation rather than an isolated episode, reinforcing the fragility of this maritime corridor.

The Strait of Hormuz is not just a maritime passage; it is a point where geographic realities underpin energy security and strategic signaling. Nearly a fifth of globally traded oil passes through this narrow waterway, making even limited disruptions disproportionately consequential. What is at play is not only the risk of closure, which remains unlikely given the costs to all actors, but the persistent possibility of managed instability. Low-intensity, deniable actions such as mine deployment, vessel harassment, or targeted seizures create uncertainty without crossing thresholds that would trigger full-scale conflict. This "grey zone" dynamic allows states to exercise coercive leverage while retaining plausible deniability.

Such dynamics point to a broader structural condition. Contemporary maritime competition is increasingly defined not by decisive naval battles but by the ability to shape risk environments in critical corridors. Chokepoints like Hormuz function as strategic pressure valves, where even the perception of insecurity can influence insurance premiums, freight rates, and routing decisions. In this sense, disruption operates as much through market psychology as through physical interdiction. The result is a form of economic statecraft that weaponises uncertainty rather than outright blockade.

Beyond Hormuz, the Indian Ocean's wider chokepoint architecture reinforces this logic. The Strait of Malacca remains indispensable for East Asia's energy lifelines, while secondary routes such as the Mozambique Channel and the Lombok Strait offer limited redundancy at higher economic and logistical cost. This uneven geography creates asymmetries of vulnerability. States dependent on uninterrupted flows bear higher exposure, while those capable of threatening disruption gain strategic bargaining power.

A shift is visible from sea control to what may be better understood as chokepoint-centric deterrence. Here, influence is exercised through positional advantage, selective disruption, and the credible signaling of escalation potential. Control is rarely absolute; instead, it is contingent, episodic, and often indirect. The strategic objective is not domination of the commons in a classical Mahanian sense, but the ability to modulate access at critical nodes.

For India, these evolving dynamics carry layered implications. Geographically central to the Indian Ocean Region, India is both a stakeholder in the stability of maritime flows and a potential security provider. Its maritime vision, articulated through SAGAR (Security and Growth for All in the Region), must therefore move beyond presence-based diplomacy to capability-driven deterrence. This includes enhancing maritime domain awareness, investing in mine countermeasure capabilities, deepening interoperability with partner navies, and strengthening institutional mechanisms for cooperative security. Equally, it requires recognition that economic resilience, including diversification of energy routes and strategic reserves, is inseparable from maritime strategy.

An additional layer of complexity lies in the growing entanglement between state and non-state actors, and the blurring of military and commercial domains. The presence of paramilitary forces, private shipping interests, and globally distributed supply chains means that chokepoint tensions are no longer confined to traditional state-to-state confrontation. Instead, they unfold across a hybrid battlespace where legal ambiguity, fragmented accountability, and asymmetric tactics prevail. This complicates deterrence, as responses must be calibrated not only to avoid escalation but also to maintain the legitimacy of maritime norms such as freedom of navigation. In this environment, the challenge is not simply securing sea lanes, but governing risk in a domain where disruption is diffuse, attribution is contested, and the economic consequences are immediate and far-reaching.

The developments in the Strait of Hormuz ultimately point to a larger conclusion. In an interconnected global order, chokepoints are not peripheral constraints but central theatres of geopolitical contestation. Their significance lies not only in their physical narrowness, but in their capacity to compress risk, amplify leverage, and transmit shocks across the international system. As great power competition intensifies, the governance of these narrow seas will increasingly define the stability of both regional security architectures and the global economic order.

(The writer comments on international relations and education, is the co-author of Creativity and Critical Pedagogy in Education and is pursuing a PhD in Political Science.)

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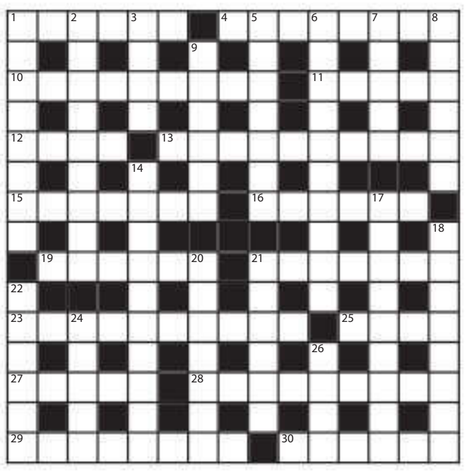

Yesterday's Solution

E	V	A	N	G	E	L	I	S	T	■	S	T	A	G
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S	A	T	A	N	■	C	O	L	O	N	N	A	D	E
E	■	I	■	E	■	R	■	V	■	E	■	D	■	E
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R	■	L	■	A	■	S	■	■	■	R	■	N	■	F
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V	■	■	■	C	■	E	■	M	■	R	■	■	■	I
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L	■	R	■	S	■	■	■	N	■	H	■	S	■	S
A	R	B	I	T	R	A	R	I	N	E	S	S	■	■
T	■	I	■	E	■	V	■	F	■	M	■	E	■	F
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O	■	A	■	■	■	I	■	S	■	R	■	A	■	O
N	I	L	E	■	B	L	I	T	Z	K	R	I	E	G

ACROSS

1 Easy to manage stealing note from abode (6)
4 Posh stuff husband put into pitchers (8)
10 Comic publisher left, editor was amazed (9)
11 Verona's drop of espresso average (5)
12 Succeeded in project by a whisker (4)
13 Player who's perhaps switched sides gets negotiator (10)
15 Gathering hears TV broadcast (7)
16 Briefly applaud south-east Cheshire maybe (6)
19 Sorry after empty show nosedives (6)
21 Staff getting bug possibly creates controversy (7)
23 Cruise too choppy near Malta for whale spotting? (10)
25 Mother recalled swallowing energy drink (4)
27 Bimbo regularly interrupts boxer`s defence (5)
28 Ordered new balti and eastern booze (5,4)
29 Free entertainment is essentially cheap work (8)
30 In Rhineland, it's good red plonk (6)

DOWN

1 Bottle stars Moore and Travolta (8)
2 Irish County's team opener (9)
3 Python discovered in sediment (4)
5 Bacchanalian party held by female in charge (7)
6 Contractor stores one key grape (10)
7 Praise old sailor having had tip-off? (5)
8 Wander into quiet yard – it's fortified (6)
9 Somewhat better alcohol to be served up (6)
14 Expert one got Lois in a state (10)
17 Waiter weaving more lies around top of menu (9)
18 Ultimate decider of a police departmental match? (4,4)
20 Elvish folk spin in places (7)
21 Ignore ticket on unoccupied Bentley (4,2)
22 Transfer cycling Geordie duo on the box (6)
24 Sheepish bearer of grapes bearing nothing (5)
26 Paddington's home page initially enrages rail union (4)

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

100 Years Ago

OCCASIONAL NOTE

Great interest must centre in the gathering at Ahmedabad which is to consider the Sabarmati Pact, for upon the decisions reached will depend the whole future course of the policy of the Swaraj Party. If the pact is endorsed the practice of non-co-operation will cease, and the Swarajists will come to the Councils prepared to work in the spirit of responsive co-operation. The change will come too late, for so far as Bengal is concerned it seems most improbable that the Swarajists will have a word to say about the formation of the next Government. The mischief has been done. The communal issue has been raised and cannot now be swept aside. So long as the manifestations of the communal spirit are confined to peaceful differences they may serve to open the eyes of Indian politicians to realities, the chief of which is that until the two communities think along the same lines and work together in the political field the materials for a campaign for Swaraj do not exist.

News Items

GREATER CALCUTTA
NEED OF BETTER DOCK FACILITIES

HOOGHLY BRIDGES SCHEME FOR A RIVERSIDE ELECTRIC RAILWAY

The problem of the future development of Calcutta with special reference to the provision of communications over the Hooghly is dealt with in a comprehensive manner by a special correspondent of the Statesman, who urges the adoption of a definite policy to maintain the position of Calcutta as one of the chief ports of the world. Calcutta, he states, must continue to grow north and south along the river but it is also essential to provide east and West communica-tions, because Greater Calcutta must be encouraged to spread in those directions. If a reasonable number of crossings over the Hooghly are provided Howrah will quickly spread itself over as large an area as is now occupied by Calcutta. The writer denounces the present system whereby thousands of tons of merchandise are daily unloaded on the roads of the city and predicts the doom of the present jetties. The purchase of the Port Commissioners' lines is advocated with the ultimate view of bringing the electric trains over the Bally Bridge to turning points in the neighbourhood of the High Court and Hastings and possibly Kidderpore. With stations approximately every 500 yards, along the river the writer states that Calcutta could be completely linked up by means of electric trains with most of the suburban stations for some twenty-five miles around, the main line termini being kept on the outskirts of the city.

MR. A. BRERETON

DEATH OF RETIRED RAILWAY OFFICIAL

London, May.

The death is announced of Mr. Alfred Brereton, C.S.I., one time manager of the Eastern Bengal State Railway.—Reuter's Special Service.

SALONIKA MUTINY ALLEGED

LEADERS GRANTED AN AMNESTY

Athens, May.

Colonel Zavjellas, Major Karakoufa, and Col. Bakirdji, who were recently sentenced to death as leaders of the Salonika mutiny, have been granted an amnesty and released. —Reuter's Spe cial Service.

DAVIS CUP

SOUTH AFRICA DEFEATS PORTUGAL

London, May.

At Sutton, South Africa defeated Portugal in the first round of the Davis Cup, winning three out of the first four matches. South Africa meets Austria in the second round .—Reuter.

GOODSELL WINS AGAIN

SCULLING CHAMPIONSHIP ON THE PARAMATTA

Sydney, May.

For the world's sculling championship over a course of 3 miles 157 yards, on the Paramatta River, Major Goodsell beat Tom Saul by 7 lengths. The winner's time was 23 minutes 1 second.—Reuter's Special Service.

DECCAN Chronicle

5 MAY 2026

Shock exit of Didi & Stalin to impact national politics

The results of the elections to the four state Assemblies and a Union Territory have come as a shocker for the ruling parties in three big states while the party in power in the fourth and the one in the UT have returned with an increased margin. It is likely to impact the national politics in a way no other state election results have till now.

West Bengal has chosen to experiment with saffron politics for the first time in its history. The state has for the last six decades elected the Congress, the Communists and the Trinamul Congress in that order and has, this time, picked the BJP. It is the culmination of the efforts the BJP has been making to storm the West Bengal fort for years. Deft planning and impeccable execution have been at the core of the BJP's strategy in all elections, and West Bengal was no different. This time, they bore fruit.

It must, however, be remembered that about 27 lakh voters in the state were denied their constitutional right to vote in the election for no fault of theirs. The Election Commission deleted their names from the electoral roll citing "logical discrepancies", a term which even the Supreme Court of India found hard to digest. The mechanism the Election Commission had arranged for redressing their complaints failed to do its job in time, effectively denying them a say in the democratic governance. Even the Supreme Court, which went out of the way to help the EC get out of the mess it had created, refused to come to their rescue. The moral deficit these collective actions have caused will weigh on the results in the state.

The surprise element in these elections is the arrival of actor-politician Vijay and his nascent Tamilaga Vetri Kazhagam (TVK) on the political scene of Tamil Nadu, capturing power at the first go. The ruling DMK was at the receiving end which suffered the double whammy of its president and chief minister M. K. Stalin losing his own seat, a traditional party stronghold. Mr Vijay's success is unparalleled in the political history of not just the state but of the country. A man with no political or administrative experience, Mr Vijay will have to learn on the job how to steer the destinies of more than seven crore people.

The Left Democratic Front in Kerala has got the worst drubbing in its history when it was thrown out of power after successive wins in 2016 and 2021: the alliance that won 99 of the 140 seats last time was confined to 35 while the Congress-led United Democratic Front hit a three-digit mark, winning 102 seats. It was a shock defeat for the LDF, too, as it was hoping to romp home on account of the development and welfare measures it had introduced in the last 10 years. It will now be up to the Congress, as the leader of the alliance, to follow up on the promises it has made to the people. While the BJP made a clean sweep of Assam elections, the NDA coasted to a comfortable majority in Puducherry, earning another consecutive term.

The elections have unseated three chief ministers who were in the vanguard of the national Opposition and were the bulwarks against the BJP-led Hindutva politics: Mamata Banerjee, M.K. Stalin and Pinarayi Vijayan. They were all part of the I.N.D.I.A. bloc that proved its collective strength in the Lok Sabha recently. While Ms Banerjee will be replaced by a BJP nominee, Mr Stalin's replacement has not yet made his approach public yet. The incoming Kerala chief minister, a Congress nominee, does not alter the equation. The I.N.D.I.A. bloc will have to rewire its own politics if it is to remain relevant in Indian politics.

Left is left out in all states, UTs

The loss of the CPM-led Left Democratic Front in the Kerala Assembly elections marks a historic moment in Left politics in India when there is no state in the country now where a Communist party is part of the government. This is for the first time that the Left movement has landed in such a predicament in the last six decades.

The Left's tryst with political power started in April 1957 when E.M.S. Namboodiripad was sworn in as chief minister of Kerala, heading a CPI ministry. It has been recorded as the first instance when a Communist government assumed power through the ballot anywhere in the world. The state government was, however, dismissed two years later by Prime Minister Jawaharlal Nehru, using Article 356 of the Constitution. EMS returned to power 10 years later as the head of the first coalition ministry in the state. The Left was later elected to power in the state several times, and had a long run heading the governments in West Bengal and Tripura. It lost West Bengal in 2011 and Tripura in 2017. It is curious that the run now ends in Kerala where it all began.

Indeed, the Left in India managed to survive the eighties and nineties which saw Communist governments all over the world crumble. It was not just the governments that vanished, most parties themselves disintegrated. However, the Indian versions adapted themselves to the local situations and remained relevant. The loss in West Bengal was a body blow to the CPM-led Left Front in the state as today there is not even a distant hope that it will return to its previous position.

Tripura and Kerala scripted different stories, though, where the Left returned to power after being defeated.

The LDF remains a major political force in Kerala where it is likely to be back making use of the state's revolving door policy. But until that happens, there will be no minister owing allegiance to the red flag at a time when the nation is increasingly saffron.

DECCAN CHRONICLE

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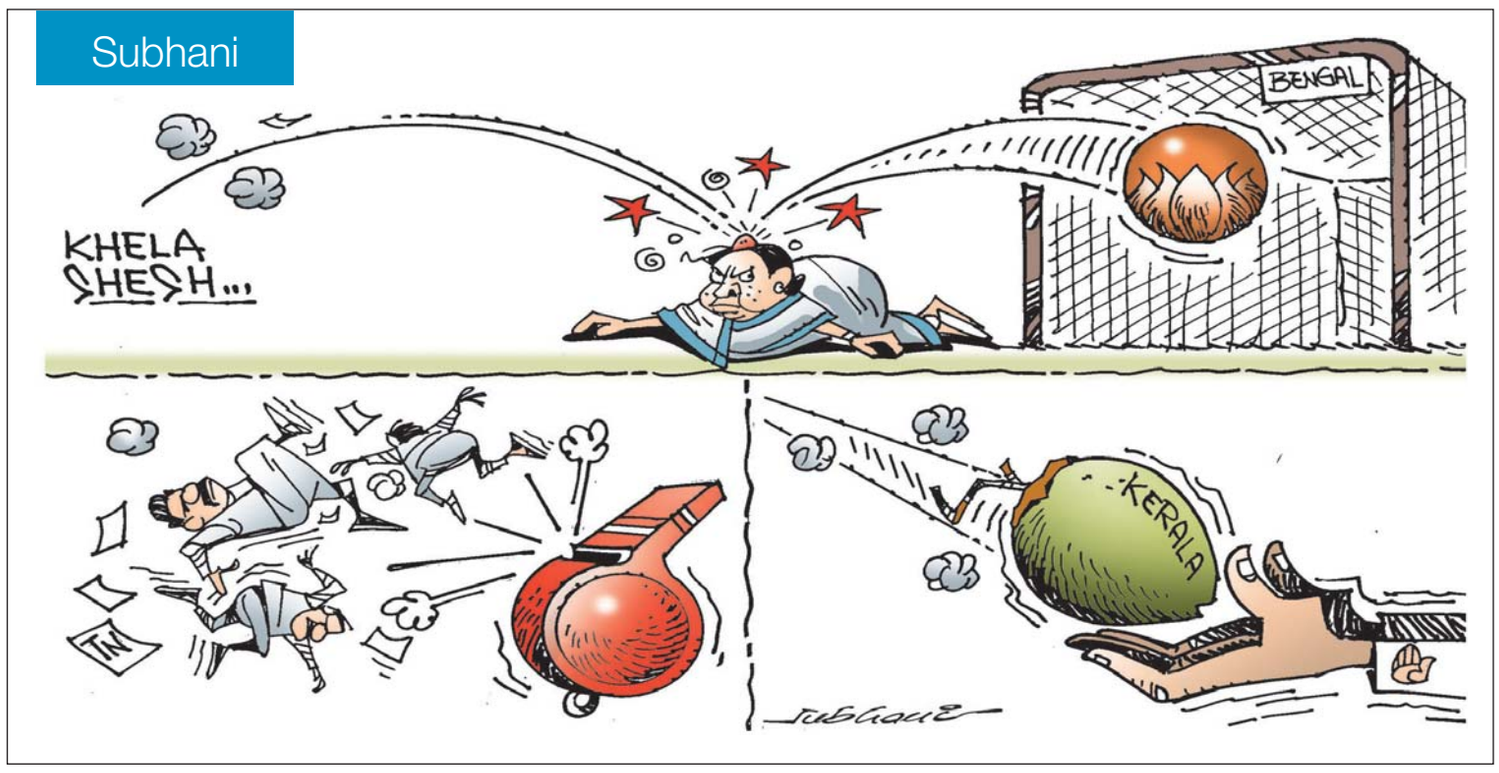
Subhani



A Hindu vote for change shakes up West Bengal

Shikha Mukerjee

What really worked for the BJP was anti-incumbency, the excesses of TMC '*bahubalis*', the inability of Ms Banerjee to contain corruption in her government and the transmogrification of the R.G. Kar stir into anti-TMC sentiment.

The BJP's relentless pursuit of capturing West Bengal and establishing its empire of the North has finally come to pass. The May 4 result in West Bengal is the ascent of a new Hindu assertion, the fragmentation of the Muslim consolidation that supported the Trinamul Congress through its three terms in power, since 2011, backed by a precise estimate of how the savage deletions of 91 lakh voters, Hindus and Muslims, by the Special Intensive Revision process of electoral roll purification.

The 2026 results in Kerala, Tamil Nadu and West Bengal, though not in Assam or Puducherry, is a people's verdict against incumbent ruling regimes. In holding the governments of the three states where the ruling party or ruling alliance has been ousted, voters seemed to have based their preferences on perceived failings and discontents. The ruling establishments were held to account and judged unsatisfactory in discharging their responsibilities. The failure to meet expectations implies that not just Gen-Z in Tamil Nadu, but voters in West Bengal and Kerala are impatient for change.

The BJP's triumph is in spreading its polarising thesis that Bharat that was India is a Hindu-majority nation where the Muslims suspected as "*ghuspaithiyas*", or illegal infiltrators, must be detected, deleted and deported has succeeded. From Manipur, where the BJP government has failed to control the internecine violent confrontations between Meiteis, Kukis and Nagas, to Goa on the west coast, barring the tiny unannexed territory of Jharkhand and Himachal Pradesh up in the western Himalayas, the party has established itself as the dominant political force. West Bengal was the exception and now it has joined the crowd.

It's only in the states south of the Vindhyas — Kerala, Tamil Nadu, Telangana and Karnataka — that the BJP has not, as yet, achieved the dominance that the Congress once had. The one-party-rules-it-all trophy has eluded the BJP's grasp till now. If that happens, the consequences would be a transformation of India's politics, its flawed but innately democratic and republican ideology and character.

In West Bengal, what really worked for the BJP was the strong anti-incumbency sentiment among voters, cutting across the usual distinctions of class, the excesses of abuse of power by local Trinamul Congress "*bahubalis*", masquerading as "leaders", the inability of Mamata Banerjee to contain the corruption that had invaded her government's functioning, the sense of insecurity it had instilled and the disenchantment among major sections of women and men about personal safety and security, especially in the aftermath of the R.G. Kar Medical College and Hospital rape-murder case. These discontents congealed into a wave of rejection, delivering to the BJP a near two-thirds majority in the 294-member Assembly.

The BJP micro-managed the fissures and cracks, the internal dissensions and the collective grievances of different sections of voters to craft a decisive victory. Merciless as only West Bengal's voters can be, the outcome in 2026 may be of some consolation to Mamata Banerjee. She has managed to salvage 80 seats out of the 293 of 294 seats in the Assembly, despite the massive deletion of names from the voters' list and a formidable opponent, Suvendu Adhikari. When she wrecked the CPM-led Left Front bastion in 2011, not only did chief minister Buddhadeb Bhattacharjee lose his Jadavpur seat but the Left sank to total of only 62 seats.

The challenge for Mamata Banerjee and the BJP leadership is a post-poll peaceful and seamless transfer of power, as behoves India's status as the world's largest democracy. The challenge is not so much for the local BJP leadership; it is for Prime Minister Narendra Modi and home minister Amit Shah, as well as the BJP's indefatigable organiser Bhupender Yadav, who camped in West Bengal for six months to micro-manage the party's victory 's triumph to ensure that the post-poll situation remains turbulence-free.

The sweeping wins of the BJP across not just its strongholds in North Bengal, but in Muslim-majority districts of Murshidabad, Uttar Dinajpur and Malda, and on Mamata Banerjee's turf, that is the South Bengal districts comprising the Presidency Division of yore require, require it to handle the post-poll effects with care. Had the Trinamul Congress and its leader been discarded in the same way as the CPM-led Left had been, managing the post-poll effect would have been easier for the BJP.

The first green shoots have shown up for the CPM and the Congress in this election, ending their five-year dormancy, after they won zero seats in the 2021 Assembly election. A more granular analysis of how people voted in constituencies where the fight was triangular or even quadrangular will reveal how the revival of the two erstwhile ruling parties impacted the Trinamul Congress and contributed to its defeat, as well as how the performance of these two had split votes and enabled the BJP to come out on top.

The BJP has promised change in West Bengal; it has wooed voters by positioning itself as a more reliable alternative. What exactly does that change mean to all the different sections of voters that chose the BJP is unknown. Also unknown is how soon do they expect to see the change reflected in their daily lives, because in India, real change takes time. In West Bengal it will be easy for the BJP to deliver change albeit in small coins, like the promised hike in cash transfers to women and jobless youth, implementing the Seventh Pay Commission benefits to government employees, release of long-held back funds on Centrally-funded schemes, unrolling Central schemes that Mamata Banerjee had declined to adopt.

For real change, like an economic turnaround and lift-off, the BJP cannot set a timeline.

The world economy is in far too turbulent a state for the BJP to predict what it can do and what it can spend to buffer the impact of global instability on the lives of ordinary people, already stressed by inflation, joblessness and declining incomes.

Going forward, over the next five years the BJP has to deal with its two major promises: change and its declared priorities. To fulfil the change agenda, the state needs peace and stability and a modicum of consensus on achieving the change. To fulfil its declared priorities of zero-tolerance for "*ghuspaithiyas*", bar their entry, to deport all those identified by the SIR process, the BJP will have to destabilise the social equilibrium. Managing the contradictions will be difficult, because as the party in power, it has to maintain law and order and a smooth transition of power.

__Shikha Mukerjee__ is a senior journalist in Kolkata

LETTERS

BUDDHA RELICS

The sacred relics of Buddha from Piprahwa stupa in Kapilvastu excavated 75 years back and now placed at exposition at Leh-Ladakh on the 2569th Buddha Purnima is very heartening and the government's efforts are praiseworthy *(Buddhism legacy is India's pride, May 4).* One among four big religions of India has structured core principles of four noble truths, noble eightfold path and nirvana emphasising cessation of sufferings through moral and ethical living. Thus Buddhism's contribution is beyond religion for the well being of humanity.

Buddha Jagdish Rao
Visakhapatnam

DIABETES DEFENCE

The childhood diabetes care plan aims at early detection and reducing long-term complications among children *(Childhood diabetes care plan unveiled, May 5).* The health department's roadmap of universal screening, timely diagnosis, and affordable treatment reflects a proactive approach. By prominently publishing this report, the newspaper has done justice to the people by spreading awareness and prompting timely action. Public participation through healthy lifestyles, regular check-ups, and awareness is crucial to curb this growing menace effectively.

Kolluru Raju
Kakinada

KHALISTAN FACTOR

Canada is waking up to the reality or realising its past mistakes for encouraging Khalistani movement from its soil in cahoots with USA and other Western nations which wants India to disintegrate into smaller countries *(Canada: Khalistanis a security threat, May 4).* The Khalistanis were responsible for the assassination of Indira Gandhi. Former prime minister of Canada Justin Trudeau made a hue and cry when some Khalistani terrorists were eliminated on foreign soil just because a couple of them happened to be holding Canadian passports. Following the election of new PM Mark Carney, things changed for good, as the present ruling clique realised the country's folly in allowing Khalistanis to propagate their movement.

Govardhana Myneedu
Vijayawada

Email your letters to info@deccanmail.com, editor@deccanmail.com.

The phenomenon called Vijay lives up to his name, heads to Fort St George

R. Mohan

The actor Vijay, who portrayed himself as a moral corrective on screen, has created history in modern politics by leading his fledgling party Tamilaga Vettri Kazhagam to victory in its maiden election. Remarkably, the win also ends a Dravidian duopoly that traces its roots back to 1967. On course to becoming the fourth professional cinema star to become Tamil Nadu's chief minister — after MGR, Janaki MGR and J. Jayalalithaa — in a state with an established but curious political tradition by which cinema does not merely entertain but also governs, he is not an accidental politician.

In fact, Vijay was willing to give up a lucrative multi-crore career in films. He was convinced that politics is not something to be dabbled in as a hobby but to be taken up as a serious full-time avocation. He sowed the wind in declaring that *Jana Nayagan* — still stuck with the censors in a blatant act of political intervention — would be his last film and he is reaping the whirlwind now. He chose politics as if he were destined to wear only that hat from, now and he is inescapably full time into it now.

It is incredible that his political journey, which is well on its way to becoming a blockbuster as a cinematic success saga, should pitch him now as the people's saviour for whom the public voted without caste or religious considerations. His connection with Gen-Z that attracts almost devotional loyalty may have helped considerably as the youngest of citizens, without a right to vote, brainwashed adults in the family to blow the "whistle" and ditch their regular pick of one of two Dravidian majors.

Like his movie career in which he rose in calibrated manner from the romantic hero to the angry young man and then on to a vigilante in his latest films, he plotted the start of his political career with single-minded determination. He also chose to go straight to the people on his own rather than learn the ropes by joining an established Dravidian major. He stuck to being a political loner in the Dravidian heartland despite several overtures, both from the AIADMK and BJP, as he was willing to give time if needed for his new career to take roots and flourish.

It's not funny how all forces united against him, especially after the fiasco of a stampede at his Karur public meeting, which of course did lead to the spawning of many a conspiracy theory. They denied his last film its long-awaited release date. They dragged him over the coals at the CBI in inquiring about the stampede that killed 41 people. They placed impossible conditions on his rallies and public meetings, with pliant police honchos following instructions like a faithful dog.

The political establishment, which may have once bought off Rajinikanth when he was contemplating a political entry, set him upon Vijay while also influencing everyone else to decry his political foray. Vijay stuck to his guns and to political strategist Prashant Kishor's advice not to align with either Dravidian party nor have any truck with the BJP and to fork out a path on his own, convincing him with the argument that 2026 may be a little early but 2031 would be the time to fulfil his Fort St. George ambitions.

Vijay ploughed a lonely furrow, unmindful of the coalition of forces against him that did not let him campaign as the leader of any political party would be allowed to. He had a simple message for his greatest supporters in the youth, telling them to convince their elders to switch and to go early to the poll booths themselves to avoid clashing with regulars. The percentage of young voters by 9 am gave an early inkling of where the polls may be headed even before the women, his largest group of supporters, could get to the EVMs.

Calling the BJP an ideological opposite and terming the DMK his sworn political enemy, Vijay was steadfast in his Tamil identity while pledging loyalty to the ideals spelt out by Dravidian leaders like Periyar and Annaduari. Tactically, he promised much the same things to the electorate — money for women to run the household, unemployment allowance for jobless graduates, waiver for farm loans and even a fanciful ministry of artificial intelligence — and all this only helped the connect with the voting public grow.

The most bankable cinema star touched the hearts of Gen-Z, seduced women with his cinematic charm, vowed youngsters eyeing a secure future and having learnt that voting patterns and the general profile of those casting their votes, he went on a temple run as if to stress to the people resident in the Dravidian heartland that he was a man who will not abandon his faith for the sake of ideology or votes.

They castigated his lack of political experience while pointing to how MGR had been in politics for long before breaking away from the parent DMK and forming his own party. Like in cinema, he might enjoy learning to swim at the deep end much in the fashion of the all-conquering Tamil folk heroes who fought off their oppressors to emerge triumphant. In this, he was more Jayalalithaa than MGR as he faced the initial hurdles on his own to emerge victorious, making the victory even sweeter.

In the modern age of instant communications and social media, Vijay's cult figure status was sufficient to dispel doubts over the handling of the intricacies of administration and judging the changing political cadences of Tamil Nadu's identity politics. In typical cinematic style of the rescuer in any crisis, he had promised: *Naa Varen* (I am coming). And he has indeed arrived!

Modi wave in Bengal; Vijay's blockbuster in Tamil Nadu

THE much-awaited 2026 Assembly poll results of four states and one union territory were out on Monday. Prime Minister Narendra Modi and his confidant Amit Shah, Union Home Minister, helped Bharatiya Janata Party (BJP) capture West Bengal, the key bastion on the East Coast of India while Tamil Nadu threw up a big surprise with Tamilaga Vettri Kazhagam (TVK) floated by actor Vijay coming with a blockbuster performance. As estimated by several exit polls, the BJP-led National Democratic Alliance (NDA) retained power in Assam with more than two-third majority whereas the Congress-led United Democratic Front (UDF) rode to a big victory in Kerala, riding on an anti-incumbency wave against the Left Democratic Front (LDF), which had won a rare second term five years ago. Puducherry, the lone union territory that went to polls this time, remained in the NDA kitty. The elections were held in three phases – April 9, 23 and 29.

On its part, BJP was trying to win in West Bengal for over a decade now. The saffron party finally breached the fortress of Didi, as theTMC chief and outgoing chief minister Mamata Banarjee is popularly known, this time. BJP secured a massive mandate of over 200 seats in the 294-seat Assembly in what could be described as the saffron party's eastern surge. Modi's popularity and Amit Shah's political strategies played a key role in the massive victory. Further, BJP carefully nurtured Suvendu Adhikari, who had switched over to the saffron party from TMC, as its local face and this strategy also paid dividends. Tamil Nadu was a big surprise as actor-turned-politician Vijay's TVK, a new entrant into Tamil politics, emerged as the single largest party with 108 seats out of 234 seats. The defeat of the ruling DMK was so severe that outgoing chief minister M K Stalin himself lost in his Kolathur constituency. In contrast, the TVK chief scored massive victories in both the constituencies that he contested. He is the second film star to achieve massive electoral success within a short span after launching a political party. Telugu Desam Party (TDP) founder N T Rama Rao achieved similar success in the 1980s.

The Congress-led UDF's victory in Keralam was on expected lines. UDF marched towards victory in 99 out of 146 seats in the Assembly. The state remained a one-term wonder for political parties as UDF and LDF swapped power for a long-time. However, LDF created a record of sorts by retaining power in 2021. This time, UDF had an upper hand though LDF tried hard for a third successive term. UDF's victory will obviously give a boost to Congress.

In Assam, Chief Minister Hemanta Biswas Sarma achieved the target he had set before the elections. The BJP-led alliance increased its tally by 22 seats to cross the 100-mark in the 126-member Assembly. The Congress-led alliance saw its tally reduced by eight seats to 22 seats. That way, Sarma has not only retained power, but also increased the alliance's tally, which is a remarkable performance. In Puducherry, NDA bagged 18 seats in the 30-seat Assembly, thereby winning in the state yet again.

The latest Assembly election results indicate that BJP is still capable of making inroads into newer states and newer areas despite remaining in power at the Centre for more than a decade. While it stormed to power in West Bengal and retained power in Assam as well as Puducherry, it improved its vote share in Keralam. However, the south of Vindhyas is still out of bounds for the saffron party as evidenced in Tamil Nadu. But given its stupendous rise in West Bengal in a span of a decade, the saffron party may now push hard to make a mark in south India as well. Vijay's blockbuster political debut goes on to indicate that star power still matters in Tamil Nadu when opportunity arises.

Don't ban AI use in courts, but insist on accountability

Prof Madabhushi Sridhar Acharyulu

THE legal system and lawyers are baffled by the dangerous incident involving Artificial Intelligence (AI) and justice. It is a unique case: the "Jyoti w/o Dinesh Tulsiani Vs. Elegant Associates" because it is a textbook example of the dangers of using AI in the courtroom. It is assumed without human oversight.

Here is the breakdown of how it happened, the technical "trap" behind it, and its impact on the legal system. This time, it revolves around a Public Interest Litigation (PIL) on the 'use or otherwise' of artificial intelligence. Earlier, the system understood the significance of PIL. Such a great PIL was about a new technology called 'AI'.

The Supreme Court, on December 5, 2025, refused to entertain a PIL seeking to curb the "unregulated" use of artificial intelligence. Lawyers and Judges deliberated about machine learning in the judicial system and the impact of justice on AI.

Non-existent 'facts and judgment:

The case originated in the Bombay High Court during a dispute over a residential flat eviction under the Maharashtra Rent Control Act, 1999.

a) Are the parties 'real'? The dispute involved a flat owner (Deepak Shivkumar Bahry) and a tenant company, Heart & Soul Entertainment Ltd, represented by its director, Mohammed Yasin.
b) Are the submissions 'real'? Between February and April 2025, the respondent (Yasin) filed written submissions seeking relief from eviction.
c) The AI 'markers': Justice M M Sathaye noticed several "give-away" features in the documents: They included 'green-box tick-marks, distinctive bullet points, repetitive phrasing and a generic structure typical of an LLM output.

The "Phantom" Case: The most critical error was the citation of Jyoti w/o Dinesh Tulsiani Vs. Elegant Associates. When the judge and his law clerks attempted to verify the case, they found it did not exist in any legal database or reporter.

The outcome: The Bombay High Court imposed a fine of ₹50,000 on the litigant for "dumping" unverified material on the court. While the Supreme Court later expunged some of the High Court's harshest remarks about the individual, it used the opportunity to label such AI misuse a global "menace."

A 'legal' menace and AI hallucination:

This is a landmark moment for the Indian judiciary, highlighting a phenomenon often called "AI hallucination." When the Supreme Court refers to this as a "menace," they are addressing a growing global crisis where the convenience of Large Language Models (LLMs) clashes with the rigid requirements of legal accuracy.

The "Jyoti Tulsiani" case serves as a warning that in the age of AI, the old legal maxim remains more relevant than ever: Caveat Emptor (Buyer beware), or in this case, Caveat Advocatus (Lawyer beware). At most, the AI must be a powerful co-pilot and never be the pilot, especially when "precious judicial time" and a client's legal rights are on the line. Or do we need to think courts should move toward a mandatory "AI disclosure" certificate for all legal filings to prevent this?

LLMs to find the source of truth:

To understand why this happens, one must understand that Large Language Models (LLMs) like ChatGPT are not search engines; they are probabilistic text predictors. The hallucination trap: This occurs when the model generates text that is grammatically perfect and stylistically authoritative but factually non-existent.

Logic vs. Fact: If an LLM is asked for a "precedent regarding tenant rights in Maharashtra," it may "invent" a case that fits this pattern perfectly because its goal is to provide a response that looks like a correct answer, rather than verifying if the case exists, in the first place.

LLMs predict the next most likely word in a sequence. In a legal context, if you ask for a case about a specific niche topic, the model might "hallucinate" a perfect precedent because its training data suggests that this is how a citation should look, even if that specific case was never argued.

The Bombay High Court bench of judges explained that they had noted that submissions of the appellant were generated using ChatGPT, including a judgment that had no citation in the real world.

The 'silent' verdict:

The judiciary's stance is clear: AI can be a co-pilot, but never the pilot. Using AI for research is "welcome" for efficiency, but filing unverified AI-generated text is increasingly being viewed as a form of professional misconduct or contempt of court. The "Jyoti Tulsiani" case serves as a warning that in the age of AI, the old legal maxim remains more relevant than ever: Caveat Emptor (Buyer beware), or in this case, Caveat Advocatus (Lawyer beware).

At most, the AI must be a powerful co-pilot and never be the pilot, especially when "precious judicial time" and a client's legal rights are on the line. Or do we need to think courts should move toward a mandatory "AI disclosure" certificate for all legal filings to prevent this?

Sensing the mood of the bench, senior advocate Anupam Lal Das, appearing for petitioner Kartikeya Rawal, sought permission to withdraw the petition, which was allowed.

AI to fabricate: The global context:

India isn't alone in this. This mirrors the infamous Mata v. Avianca case in the United States (2023), where a lawyer was sanctioned after using ChatGPT to find precedents (Previous Judgments), resulting in the submission of six non-existent cases. The lawyer's defence was that he "did not breathe" the possibility that the AI could fabricate cases.

Best practices for legal professionals:

The court isn't banning AI; it's demanding accountability. If you use AI for research, you must: Verify via official databases: Human-in-the-loop (Use AI for drafting or brainstorming, but the final legal "sanity check" must be performed by a qualified human: Disclose usage: Some jurisdictions are now requiring lawyers to file a certificate stating whether AI was used and that all citations have been verified.

The effect on justice: The Supreme Court's alarm stems from the fact that legal "hallucinations" are not just technical glitches; they are fundamental threats to the adjudicatory process. The analysis of the impact on the Legal System

Judicial efficiency: Our Courts, already burdened with backlogs, must now waste "precious judicial time" (as the HC put it) chasing ghost citations.

Integrity of process: The legal system relies on the Rule of Law, which is built on verified precedents. Allowing fake cases into the record compromises the accuracy of judgments.

Professional ethics: It shifts the burden of research from the lawyer to the judge. The court noted that lawyers have a "great responsibility" to cross-verify everything.

Risk of miscarriage: If a judge (or a less experienced lawyer) fails to catch a hallucinated citation, a person could lose their property, liberty, or rights based on a law that doesn't exist.

A lesson to the Bar and Bench: While acknowledging the concerns, the Chief Justice of India stated that this is a lesson for both bar and the judges. He said: We use it in a very over-conscious manner, and we do not want this to overpower our judicial decision-making. Judges must cross-check. This is part of the judicial academy curriculum and is taken care of.

AI may assist with judicial tasks, but it cannot replace or influence judicial reasoning.

One should know that it casts a duty on the lawyers and the judges to verify the AI-generated case laws, and this can be dealt with in judicial academies and lessons to train the bar and bench

(The writer is Advisor, School of Law, Mahindra University, Hyderabad)

Flyovers can be constructed without destructing KBR Park

I Y R Krishna Rao

A jungle amidst a concrete jungle, the KBR park has become an important lung space in Jubilee Hills, Hyderabad. Spread over 400 acres, this Deccan plateau forest with dry deciduous plants has become the place for morning and evening walks by the city's who's who. Now the park is under threat with the Telangana government proposing to take up large scale road widening flyovers under passes, among others.

Incidentally, this is the second time the park has come under attack.

The place originally called the Chiran Palace Complex was with the nawab of Hyderabad and taken over by the government in the 1990s as surplus land under the Urban Land Ceiling Act. Located in the heart of the city it was most sought after both by realtors and politicians. It goes to the credit of the then Andhra Pradesh chief minister Nedulamalli Janardana Reddy and the then chief secretary K Madhava Rao for saving the precious land from becoming a colony for MLAs or auctioned off for real estate purposes. The subsequent chief minister K Vijayabhaskara Reddy handed it over to the forest department to ensure that no one could meddle with it even in the future.

But then today once again the park is being targeted in the name of road widening and flyovers. It was thought of as a closed chapter with land coming under forest control.

Though there is a need to reconcile and take a balanced view with reference to development and environment protection, the present proposal to widen the roads and construct flyovers that essential that the park needs to be sacrificed is the question.

KBR Park and for that matter Jubilee Hills used to be at one end of the city till the development of Cyberabad and expansion of the city to the west.

Now Jubilee Hills has become the centre connecting the eastern and western parts of the city. Hence the proposal to widen roads and construct flyovers to ease the flow of traffic from west to east and vice versa. The fact is that the same can be achieved without encroaching on this lung space. By widening and by adding more lanes to existing roads on the Tolichowki side and the Miyapur link traffic can be effectively diverted on both sides of Jubilee Hills. In fact, that may be a far cheaper option than building more flyovers and underpasses. I am sure Rahul Gandhi, who has set his eyes on the greater Nicobar project, will not lose sight of this smaller biodiversity issue and counsel his party's government to drop the idea of ravaging a lung space carefully preserved by his own party's chief ministers withstanding immense financial and political pressures.

(The writer is former Chief Secretary of undivided Andhra Pradesh)

People yearn for a prosperous and developed Telangana

N Ramchander Rao

AS Telangana gears up for Prime Minister Narendra Modi's visit on May 10, the state is buzzing with anticipation for the historic Modi public meeting at the Parade Ground in Hyderabad.

This is not just another public meeting — it is a clarion call of the people's resolve against misgovernance, a powerful expression of anger at the failures of the Congress regime, and a resounding endorsement of Modi's vision for Viksit Bharat and a Viksit Telangana.

Under Modi's able leadership, India is marching towards becoming a developed nation by 2047.

In Telangana, however, the Congress government has betrayed hopes of the people, who voted for a change in 2023. Alas, promises of welfare, jobs and development have turned into empty rhetoric. Corruption, nepotism, and appeasement politics have become the order of the day, while the youth, farmers, women, and the poor continue to struggle.

Modi's transformative agenda for TG:

The Prime Minister will inaugurate and lay the foundation for development projects worth nearly Rs 8,000 crore on May 10.

These initiatives will touch every critical sector, including infrastructure, industry, healthcare, education, and rural development. They all will directly benefit the people of Telangana. Incidentally, this marks Modi's first visit to the state in his third term as the Prime Minister. There is no doubt that this will set the tone for a decisive political shift towards good governance and people-centric development.

The Janagraha Sabha will be a great platform where the people of Telangana express their akrosh (anger) against the anti-development forces and their aagraha (resolve) to back BJP's mission. It will showcase the party's growing strength in the state and reaffirm our commitment to 'Sabka Saath', 'Sabka Vikas', 'Sabka Vishwas'.

Failures of the Congress regime:

The Congress government in Telangana has miserably failed across fronts:

1) Unemployment and youth distress: Despite tall promises, lakhs of youth remain jobless. Industrial growth has stagnated, and opportunities that should have come with the IT and pharma boom are being squandered.
2) Farmers' plight: Loan waivers have turned into a cruel joke. Irrigation projects are being delayed inordinately, while farmers stare at continued uncertainty.
3) Women's safety and empowerment: Incidents of crime against women have risen, while the Congress has shown its true anti-women face by opposing key empowerment measures at the national level.
4) Law and order: Hyderabad, once a safe and vibrant city, is witnessing growing lawlessness. The Old City and other areas deserve peace and prosperity, not politics of division, which is what the Congress government is indulging in.

In contrast, the Modi government at the Centre has delivered on every front — from the historic Women's Reservation Bill to massive infrastructure push, PM-KISAN, Ayushman Bharat, and schemes like PM Surya Ghar Muft Bijli Yojana that are transforming lives across India.

A call to action:

I urge every citizen of Telangana — be it the youth dreaming of a bright future, the hardworking farmer, the empowered woman, the entrepreneur, or the patriotic citizen — to join the 'Jan Akrosh Sabha' in large numbers.

Let us make this a historic gathering that sends a clear message: Telangana rejects politics of failure and embraces the politics of performance, development, and nationalism. The Modi-led BJP is the only party committed to 'Ek Bharat, Shreshtha Bharat'. This Sabha will not only highlight the achievements of the Modi government but also expose the double standards and failures of the ruling dispensation in Telangana. It will ignite a new wave of hope and aspiration among the people. Let us all stand united with the Prime Minister to be assured of a stronger, developed, vibrant and prosperous Telangana.

(The writer is President of BJP Telangana)

LETTERS

Taming of the shrew

The nation waited for so long, with a bated breath, helplessly watching the deliberate anti-national activities during Mamata Banerjee's TMC rule, when the people of the state were virtually sidelined, silenced by fear and extreme tactics of violence to subjugate the spirit of resistance among the people in the state. The minority community and immigrants from Bangladesh began calling the shots in Bengal to undermine the writ of the Centre with impunity, all with Mamata's tacit encouragement. The fall of TMC; end to the rule of Mamata Banerjee seemed a tremendous relief to the State's law-abiding citizens, who are celebrating with spontaneous joy. The Centre played its role to mobilise more central forces to keep TMC goons at bay to ensure peaceful elections, which resulted in an unprecedented polling.

S Lakshmi, Hyderabad

Pvt sector looks at risk-reward equation

APROPOS "MEA must encourage, not harangue, private sector to invest" (May 4). While the government's frustration over stagnant private capital is understandable given the recent structural reforms, moral exhortation rarely drives markets. Businesses prioritise stability over sentiment. Instead of public chiding, the focus must shift to mitigating micro-level risks that deter long-term commitments. Simplifying bureaucratic compliance and ensuring consistent policy enforcement across states will do more for investor confidence than any speech. Ultimately, the private sector will reinvest when the risk-reward equation becomes undeniable, not when it is merely asked to.

K Sakunthala, Coimbatore-641016

Mamata has paid the price for her arrogance

THE overwhelming showing by BJP in the West Bengal Assembly elections that went to breach the 'impregnable' bastions of the TMC, is no mean achievement. They took on the arrogance and overt self-confidence of Mamata Banerjee, who was hopeful of another term in office. BJP's determined efforts paid off, in terms of exposing the misdeeds and misgovernance of TMC without resorting to the extreme step of imposing President's rule there. The self-respect and dignity of Bengal and Bengalis have been restored in one stroke, so to say.

K V Raghuram, Wayanad

Govt must involve industry in policy-making

THIS refers to the editorial "MEA must encourage, not harangue, private sector to invest" (THI, May 4). The concern over sluggish private investment despite strong corporate balance sheets is valid. Public spending alone cannot sustain growth, and businesses need confidence to commit resources. Instead of criticism, the government should focus on predictable policies, smoother regulatory processes, and genuine consultation with industry. Reducing bureaucratic hurdles and ensuring fiscal stability would create a climate where private capital feels secure. Encouragement, not admonition, will help align public and private efforts toward long-term economic resilience.

S M Jeeva, Chennai-32

Balanced bonds for better beings

WITH reference to the article "Nationwide stray dog management, SOP shows the way" (THI May 4), the Supreme Court's directive is a timely step toward harmonising public safety and animal welfare. It is ironic that society celebrates a day for dog welfare yet neglects consistent care and responsibility. A clear roadmap involving animal husbandry departments, pet owners, NGOs, and citizens is essential to ensure safe and humane coexistence. Pet owners must act responsibly, NGOs should support sterilisation and vaccination drives, and authorities must ensure proper shelter infrastructure and waste management. Citizens, too, must play a vital role by avoiding provocation, maintaining cleanliness, and reporting unsafe situations. Preventing dog bites requires awareness, timely vaccination, controlled feeding, and strict implementation of SOPs.

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BENGALURU ONLINE

State suspends 'Mangoes by Post' Initiative

BENGALURU: Mango lovers in Karnataka will not receive doorstep deliveries through the popular postal delivery initiative this season, as the Karnataka State Mango Development and Marketing Corporation (KSMDMC) has suspended its "Mangoes by Post" scheme citing financial constraints. The programme, launched in collaboration with the Department of Posts during the Covid-19 pandemic to support mango growers, had become a major platform connecting farmers directly with consumers during the annual mango season. Under the initiative, farmers would register details of their produce—including mango varieties, prices and contact information—on a dedicated online portal. Customers could then browse available options, select mangoes from a farmer of their choice, place orders online, and have the fruit delivered to their homes through India Post's parcel network.

The system enabled seamless coordination between farmers, consumers and the postal department. Once an order was placed, details of the selected variety, quantity and delivery address were electronically shared with both the farmer and postal authorities. Farmers would then pack the mangoes and send them to Bengaluru's General Post Office, from where they were dispatched to customers.

The scheme had been particularly beneficial for farmers seeking better market access and fair prices. "I have been selling mangoes through this platform for the past two years after registering with KSMDMC. Customer response was excellent, and I sold around 500 to 600 kg of mangoes. It ensured good returns.

Read more at https://epaper.thehansindia.com

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The Hans India

Business

Technology-driven innovation is the key to India's economic renaissance, with its contribution expanding from research to industry, startups and national growth Science must now move from laboratories to markets and from ideas to impact -Dr Jitendra Singh, Union Minister

BIZ BRIEFS

Santoor unveils TVC campaign

Santoor, a soap brand by Wipro Consumer Care & Lighting, has announced actor Sreeleela as its new brand ambassador, for its Santoor Shower Gels portfolio. The brand has also unveiled a TVC campaign titled 'Sandalwood Ka Remix'. S Prasanna Rai, Senior VP, Wipro, said: "Sandalwood has always been at the core of Santoor's heritage. With Santoor Shower Gels, we are reimagining this timeless ingredient in formats that are relevant to today's consumers."

Skoda Auto's biz partnership

Skoda Auto India has announced a strategic partnership with Common Services Centre Grameen eStore to expand its footprint across non-metropolitan and semi-urban India. Through this collaboration, Skoda will leverage CSC's digital and physical network to offer the Kylaq, Kushaq, and Slavia across multiple newer regions. Ashish Gupta, Brand Director, Skoda Auto India, said: "At Skoda Auto India, our growth journey is anchored in improving accessibility and building relevance across newer markets."

Oben Electric unveils Rorr EVO

Oben Electric, a homegrown R&D-driven electric motorcycle manufacturer, announced the launch of the all-new Rorr EVO at a special introductory price of Rs99,999 (ex-showroom) for the first 10,000 customers. The bike reaches a top speed of 110 km/h and offers a certified range of 180 km IDC It supports 0–80% fast charging in just 90 minutes and comes equipped with Oben Port, its onboard charger. The bike features Smart-IQ, an AI ride mode.

Enviro in pact with Anvayaa

Enviro, an integrated facility management companies and a part of the Vatika Group, and Anvayaa Kin Care (Anvayaa), have entered into a strategic partnership to extend dedicated senior citizen support to residential communities managed by Enviro in the Delhi-NCR region. The collaboration enabled through a direct app-to-app integration between the two platforms marks a shift in how facility management companies can address the real, everyday needs of residents beyond bricks-and-mortar upkeep.

Prudent rolls out Edge+

Prudent Corporate Advisory Services Limited, a fintech platform for mutual fund distributors (MFDs), announced the launch of its AI-powered business management tool build to help partners plan smarter, service clients better, market faster and grow their business with precision. According to the company: "The platform brings together its core capabilities under one intelligent interface. Edge+ is the Intelligence Quotient (IQ), the support system which will make every partner faster, sharper, and ready for what comes next."

Fertiliser subsidy set to overshoot ₹1.71 lakh cr

Govt flags rising urea, fertiliser costs; availability remains stable for kharif

New Delhi

- Fertiliser subsidy bill likely to exceed ₹1.71 lakh crore Budget estimate for FY27
- Rising global prices of urea and other fertilisers due to West Asia crisis driving costs
- Govt says fertiliser availability remains "strong and stable" for kharif 2026
- Domestic output (Mar–Apr): 67.76 lakh tonnes; imports add 17 lakh tonnes

THE government's fertiliser subsidy bill for the 2026-27 fiscal is expected to exceed the budgetary allocation of Rs 1.71 lakh crore, with rising costs of imported urea and other fertilisers driven by the ongoing West Asia crisis, a senior ministry official said Monday.

"We know that the costs have risen. Cost of both urea and other fertilisers showing an upward trend... There will surely be an increase, but as of now, cannot say," Aparna S Sharma, Additional Secretary in the Department of Fertilisers, said at an inter-ministerial briefing on developments in West Asia. Despite the supply chain disruptions triggered by the West Asia crisis, Sharma said fertiliser availability remains "strong and stable" for the kharif 2026 season.

Domestic production for March-April stood at 67.76 lakh tonnes — comprising urea (40.72 lakh tonnes), Di ammonium Phosphate (5.39 lakh tonnes), NPK (13.65 lakh tonnes) and SSP (8 lakh tonnes) — supplemented by imports of 17 lakh tonnes. The imports were managed through coordinated efforts involving the ministries of ports and external affairs. For May, the department has set a domestic production target of 22 lakh tonnes of urea, 4 lakh tonnes of DAP and 8 lakh tonnes of NPK. Some urea plants that had temporarily shut down are set to resume operations, with gas supply already secured, she said.

A global tender for urea imports has been processed, with supplies expected in May-June. A separate global tender for 19 lakh tonnes of NPK fertilisers has also been floated to meet peak demand.

The Department of Agriculture has assessed the fertiliser requirement for kharif 2026 at 390.54 lakh tonnes. Against this, states have already stocked 195.71 lakh tonnes — nearly 50 per cent of the requirement — reflecting what officials described as "improved planning and advanced stocking".

State-wise demand has been mapped based on the agriculture ministry's assessment, with stocking and advance planning already undertaken. Beyond central-level stocking, redistribution within districts remains the responsibility of state governments. "We are having regular meetings with states. As the season approaches, a 24x7 contingency cell will be set up to tackle redistribution issues," Sharma said.

Fertiliser subsidy bill set to overshoot budget estimate of Rs 1.71 lakh cr amid West Asia crisis.

Centre denies bailout to oil PSUs despite mounting losses

New Delhi

THE government has no plans to provide financial support to state-owned oil marketing companies (OMCs) for losses incurred on selling petrol, diesel and aviation turbine fuel (ATF) below cost, a senior official said on Monday.

Indian Oil Corporation (IOC), Bharat Petroleum Corporation Ltd (BPCL) and Hindustan Petroleum Corporation Ltd (HPCL) are facing significant under-recoveries after maintaining a freeze on retail fuel prices for over two months, despite a sharp rise in crude oil prices due to the ongoing West Asia conflict.

"There is no proposal before the government to support oil marketing companies," said Sujata Sharma, Joint Secretary in the Ministry of Petroleum and Natural Gas.

OMCs are estimated to be losing ₹25–28 per litre on petrol and diesel. They have also started incurring losses on ATF for the first time in over two decades, as only partial price hikes have been passed on.

While ATF prices for international airlines were raised by 5.33% on May 1, domestic airline fuel prices remain unchanged. Similarly, retail prices of petrol, diesel and domestic LPG have not been revised.

In contrast, prices of bulk diesel and commercial LPG—used by industries, hotels and restaurants—have been increased. However, these segments account for only about 10% of total fuel consumption.

The government has previously compensated LPG losses through subsidies, but no such relief is currently planned.

Shreyas Group to promote entrepreneurship in Telugu states

Targets 10,000 entrepreneurs across villages & towns with major expansion in media, events, sports & real estate

Hans Business Hyderabad

Gandra Srinivas Rao, Founder

SHREYAS Group, led by Founder Gandra Srinivas Rao, has announced a major expansion roadmap, focusing on building a powerful media, events, sports, and experience-driven ecosystem across India. The key highlight of this announcement is the launch of a village & town-level entrepreneurship model, aiming to create 10,000 entrepreneurs in Phase-1 across Andhra Pradesh and Telangana.

The company is launching a grassroots entrepreneurship model, empowering youth and fan communities across Andhra Pradesh and Telangana. Individuals can become Shreyas representatives in their villages and towns, generating leads across events, real estate, retail, and agriculture verticals, while earning through a structured business model. "The company aims to onboard 10,000 entrepreneurs in Phase-1. "We are not just building businesses. We are creating entrepreneurs. This model empowers youth to become business owners in their own regions" said Srinivas Rao.

With a strong legacy of 15 years, 5000 events, and 2500 movie promotions, the group has established itself as a leading name in India's experiential entertainment space. The group is now expanding aggressively across media & film promotions (Hindi, Punjabi, Bhojpuri, Oriya), AI-driven content production (Shreyas AI Frames), and a next-generation platform – ATT (Any Time Theatre). Alongside, the company is scaling its events ecosystem through Shreyas Corporate Club and Shreyas Utsav and real estate development via Shreyas Future City Developers. Under Shreyas Future City Developers, the group is expanding with Shreyas One City, Shreyas Signature projects, and Highway Outlet Malls, focusing on experience-driven developments.

As part of its growth strategy, Shreyas Group is strengthening its media and entertainment vertical with expansion into multiple film industries, including Hindi, Punjabi, Bhojpuri, and Oriya. The company is also launching Shreyas AI Frames, an AI-powered video production studio, and developing ATT (Any Time Theatre), a next-generation entertainment platform. "Media and entertainment have always been our foundation. With AI, content, and new-age platforms, we are building the future of storytelling and audience engagement," said Gandra Srinivas Rao, Founder, Shreyas Group.

Through Shreyas Corporate Club, the company is introducing proprietary corporate engagement formats, Weekend Farming Experience, and Village Tour Experience. Simultaneously, Shreyas Utsav will focus on premium weddings, large-scale social events, and the development of convention centers and event infrastructure, creating a complete celebration ecosystem.

Election results steady nerves, markets finish in the green

Domestic triggers and global cues lift sentiment despite crude uptick

MUMBAI: Benchmark Sensex rebounded by 356 points, while the Nifty settled above 24,100 on Monday, as buying in blue-chip stocks and state poll results trending in line with market expectations lifted investor sentiment. The 30-share BSE Sensex climbed 355.90 points or 0.46 per cent to settle at 77,269.40. During the day, it jumped 997.25 points or 1.29 per cent to 77,910.75. The 50-share NSE Nifty rallied 121.75 points or 0.51 per cent to end at 24,119.30.

From the 30-Sensex firms, Adani Ports, Hindustan Unilever, Reliance Industries, Larsen & Toubro, Eternal and Maruti were among the biggest gainers. Bharti Airtel, Kotak Mahindra Bank, Tata Consultancy Services and ITC were among the laggards from the pack.

Recovery Rally

- BSE-Sensex rose 355.90pts (+0.46%) to 77,269.40
- NSE Nifty rallied 121.75pts (+0.51%) to 24,119.30
- FIIs offloaded Rs8,047.86 cr; DIIs bought Rs3,487.10 cr

"Investor sentiment remained supported by a favourable election outcome in West Bengal and a better-than-expected Q4 earnings, helping markets look past Middle East-related concerns. "However, intermittent profit booking persisted amid uncertainty surrounding the US 'Project Freedom' initiative to reopen the Strait of Hormuz," Vinod Nair, Head of Research, Geojit Investments Limited, said.

While the resolution path may take time, optimism around gradual progress continues, he said, adding that crude prices holding below $110 are providing near-term comfort. Broader markets also advanced with the BSE SmallCap Select index jumping 0.79 per cent and MidCap Select index by 0.75 per cent. Among major sectoral gainers, BSE Realty, Services, Capital Goods, Industrials, Healthcare and Utilities gained more than 1 per cent. BSE IT and PSU Bank were major losers. A total of 2,607 stocks advanced, while 1,735 declined and 216 remained unchanged on the BSE.

"Markets are expected to sustain their gradual upmove, with near-term direction anchored around three key drivers - softer crude oil prices, strong domestic data (record GST collection & healthy April auto sales growth), and political clarity post state election outcomes. "A BJP win in three out of five assembly elections is likely to reinforce political stability and provide a sentiment boost, while record GST collection and better-than-expected auto volume growth signals resilient underlying demand," Siddhartha Khemka - Head of Research, Wealth Management, Motilal Oswal Financial Services Ltd, said.

"Early trends from key state election results provided a supportive domestic trigger, while easing geopolitical concerns, like signs of progress in US"Iran discussions, helped cool crude oil prices. This, combined with strength in global markets led by a record run in US tech indices, created a favourable risk environment," Hariprasad K, Research Analyst and Founder, Livelong Wealth, said.

RBI cautions against misleading campaigns promising loan waivers

MUMBAI: THE Reserve Bank on Monday cautioned the public against unauthorised and misleading campaigns promising loan waivers, and asked them to refrain from associating with such individuals or entities.

"RBI has observed, with serious concern, the continued occurrence of such campaigns, through various media channels and direct outreach, by certain individuals and entities," the central bank said, reiterating a similar caution it had issued in December 2023. Such campaigns not only mislead the general public but also interfere with the orderly functioning of the credit system of the country, it said.

These campaigns, among others, involve false promises of waiver of outstanding dues to banks/non-banking financial companies (NBFCs); issuance of 'debt waiver certificates' or similar documents; and collection of fees under various pretexts, including service or legal charges, from the uninformed public. "It is reiterated that any claims by individuals/entities offering such services are false, misleading, and liable to attract appropriate legal action under applicable statutes," RBI said. The Reserve Bank also emphasised that such activities undermine the stability of financial institutions, affect the interest of depositors, and engagement with such individuals/entities can result in direct financial loss.

RBI ALLOCATES PORTFOLIOS AMONG 4 DEPUTY GOVERNORS

MUMBAI: The Reserve Bank announced portfolios for deputy governors, including Rohit Jain, who assumed charge on Monday. Senior most Deputy Governor Swaminathan Janakiraman will look after 11 departments, including of supervision, legal, DICGC, and inspection, the Reserve Bank of India (RBI) said in a statement. Poonam Gupta has been assigned six portfolios, including the key monetary policy department. Deputy Governor Shirish Chandra Murmu will look after five departments, including regulation and enforcement.

Gold goes digital: NSE rolls out electronic receipts

NEW DELHI: The National Stock Exchange of India (NSE) on Monday launched Electronic Gold Receipts (EGRs) as a new segment, in a bid to create a more transparent and efficient price discovery of the yellow metal. The move is expected to bridge the age-old gap between physical gold and the financial markets by offering a regulated, secure, and technologically-advanced platform for trading in the precious commodity, the exchange said in a statement. EGRs are dematerialised securities representing ownership of physical gold, which is securely stored in Sebi-accredited vaults and held electronically through depositories. Each EGR is fully backed by physical gold and is tradable on the exchange, seamlessly integrating gold into the formal financial system.

"With this launch, NSE aims to create a robust and transparent ecosystem for gold trading, enabling efficient price discovery, improved market participation, and enhanced trust across stakeholders, including jewellers, refiners, traders, and institutional investors," the exchange said.

India reviews aluminium wire duty from Malaysia

NEW DELHI: INDIA has initiated a probe to review the need for extending the countervailing duties levied on aluminium wires imported from Malaysia, following a complaint by certain domestic players, according to a notification.

The centre imposed these duties on September 24, 2021, for five years, as subsidised exports of 'aluminium wire in coil form or wire rod in coil form' by Malaysian firms were impacting domestic players. The existing levy period will end on September 23, 2026. Hindalco Industries, Vedanta Ltd, and Bharat Aluminium Company have filed an application before the Commerce Ministry's Directorate General of Trade Remedies (DGTR) for the probe, stating that cessation of the existing duties would impact domestic manufacturers.

The applicants have alleged that the exporters of Malaysia continue to benefit from countervailable subsidies provided at various levels by the Malaysian government, the DGTR has said in a notification.

They have claimed that there is a likelihood of continuation/recurrence of subsidisation and consequent injury to the domestic industry in the event of cessation of the existing anti-subsidy duty.

UPI achieves record 22.35 bn transactions

New Delhi

ABOUT 22.35 billion transaction were carried out through the Unified Payments Interface (UPI) in April, Department of Financial Services said on Monday.

In volume terms, UPI transactions grew 25 per cent in April 2026 over the April 2025 when it was 17.89 billion.

The UPI transactions had touched a record high of 22.64 billion in volume terms in March, up from 20.39 billion recorded in February.

"UPI achieves 22.35 Bn transaction count in April'26!," Department of Financial Services said in a post on X.

UPI combines the ease of use with strong security while following the RBI's two-factor authentication rule. This first factor is the mobile number linked to the user's bank and the second is the UPI PIN, making transactions quick and safe from unauthorised access.

Today, UPI accounts for about 85 per cent of all digital transactions in India. Its impact goes beyond national borders, powering nearly 50 per cent of global real-time digital payments.

UPI is already live in eight countries, including the UAE, Singapore, Bhutan, Nepal, Sri Lanka, France, Mauritius, and Qatar. This allows Indians travelling or living there to pay seamlessly without the usual hassles of foreign transactions.

NPCI, an initiative of the Reserve Bank of India (RBI) and the Indian Banks' Association, is an umbrella organisation for operating retail payments and settlement systems in India (IBA).

It runs the UPI used for real-time payments between peers or at merchants' end while making purchases.

The Tribune
ESTABLISHED IN 1881

Saffron surge

BJP wrests Bengal, retains Assam

THE BJP has turned the tables on the ever-combative Mamata Banerjee with typical ruthlessness, ending her 15-year reign in West Bengal. The saffron party has not only breached a regional fortress with a landslide victory over the Trinamool Congress but also jolted the already vulnerable Opposition. Using every weapon in its formidable arsenal, the BJP invested heavily in cadre-building and outreach in rural areas, while its top brass — PM Narendra Modi and Home Minister Amit Shah in particular — went all out to persuade voters that the state direly needed *pariborton* (change). Mamata's campaign largely revolved around the Special Intensive Revision (SIR) of electoral rolls, which saw the deletion of around 90 lakh names. The chaotic, contentious exercise, which she described as the Centre's ploy to reduce her voter base, influenced the outcome. The fact that Mamata chose to plough a lone furrow, having no truck with the Congress and Left parties, also worked in the BJP's favour.

The Bengal verdict marks a new high for the saffron party, even though it is still struggling to expand its footprint in South India. The BJP won three Assembly seats in Kerala (it had drawn a blank in the 2021 poll) and just one in Tamil Nadu. However, the party would be pleased to see the back of DMK leader and outgoing Tamil Nadu CM MK Stalin, who had been at loggerheads with the Centre over the past five years. Anti-incumbency played a key role in Bengal, Kerala and Tamil Nadu, but the BJP easily bucked this factor in Assam to retain power.

The Congress-led United Democratic Front's victory in Kerala has given the grand old party something to celebrate, even as it has been routed yet again in Bengal. However, the reversals suffered by Stalin and Mamata imply that the Congress would continue to helm the Opposition's fragile INDIA bloc. For the BJP, the next frontier is undoubtedly Punjab, where it is busy making ambitious inroads into the Congress and AAP ranks.

Heat and storms

Region grappling with a volatile climate cycle

A SHOWER of hailstones in May in parts of Punjab, including Chandigarh, is a clear indication that shifting weather patterns are becoming the norm across North India. Unseasonal rain and high-velocity winds have once again exposed the fragility of the region's farm economy. Coming as wheat procurement peaks, the damage is not in the fields alone but also in mandis, where vast quantities of grain lie in the open, vulnerable to moisture and spoilage. For farmers, this is a cruel post-harvest blow: the crop is sold, but its value is suddenly uncertain. Procurement at MSP has expanded, but storage and logistics have not kept pace. Agencies such as the Food Corporation of India continue to rely on inadequate covered facilities, while delayed lifting leaves grain exposed to the elements. Temporary fixes — tarpaulin sheets and ad hoc stacking — are no substitute for modern, weather-resilient infrastructure.

The region is grappling with a volatile climate cycle, with early heat stress followed by erratic storms. Such swings also threaten the upcoming paddy season, where soil conditions and power-dependent irrigation will be critical. Meanwhile, wind damage to rural power lines has added another layer of uncertainty ahead of peak agricultural demand. Soaring temperatures are already pushing up power demand and straining water resources. In the hills of Himachal, the same weather pattern carries different risks, including landslides, disrupted tourism and potential harm to horticulture, particularly fruit crops at a sensitive stage.

The region, heavily dependent on agriculture, stands particularly vulnerable. What is needed is a coordinated, forward-looking approach. State governments must invest in climate-resilient agriculture, strengthen localised forecasting systems and ensure that advisories actually reach farmers in real time. Inter-state coordination, too, is essential, given the shared ecological and economic landscape.

ON THIS DAY...100 YEARS AGO

The Tribune.

THE TRIBUNE, WEDNESDAY, MAY 5, 1926

Calcutta riots

THE recent disorder in Calcutta is unprecedented in the history of British administration in this country. The main feature that distinguishes it from other communal disturbances elsewhere is the continuance of rioting, bloodshed and loot for nearly three weeks. In this respect it materially differs from a collision between two excited mobs on the occasion of a religious festival, who owing to one cause or another come into conflict with each other after which peace is speedily restored. In Calcutta, the trouble no doubt originated in the usual fashion, but the continued state of disorder cannot with any justice be ascribed to the original cause. There was no visible connection between the first and the second outbreak, and the police had ample opportunity to strengthen their position during the interregnum. The forces of law and order, however, did nothing of the kind; and Calcutta remained in the hands of goondas for nearly three weeks, the responsibility for which must primarily rest on those whose duty it was to maintain law and order. That the government did not handle the situation properly admits of no doubt whatever. So long as the maintenance of law and order remains the exclusive concern of the reserved half of the government, over which the people have no control whatever, the responsibility for preventing and suppressing disorders and riots must entirely rest on the bureaucracy alone, and in the present case, it has signally failed to discharge that responsibility. Lord Lytton's government cannot, therefore, be acquitted of the charge of failure to properly discharge its duty of protecting the lives and property of the citizens of Calcutta.

BJP cuts Opposition down to size

The party's footprint visible across India, except in some parts of the southern region

RADHIKA RAMASESHAN
SENIOR JOURNALIST

DOUBLE BLOW : The parties led by MK Stalin and Mamata Banerjee have been voted out of power. PTI

THE biggest surprise sprung by the Assembly polls in four states and a union territory is the demolition of two strong pillars of federalism, the Dravida Munnetra Kazhagam (DMK) and the Trinamool Congress (TMC). The parties led by Tamil Nadu CM MK Stalin and his West Bengal counterpart Mamata Banerjee, prominent anchors of the INDIA bloc put together to fight the BJP in the Lok Sabha polls, have been voted out of power.

Yet those who closely monitored the BJP in Bengal and watched the moves of its principal strategist, Home Minister Amit Shah, sensed that the state was on the brink of a significant shift, as momentous as the 2011 transition when Mamata routed the Left Front. The potential power switch from the TMC to the BJP was bound to torpedo the balance that the federal forces could have brought to check the BJP's hegemony, a prospect the Congress wanted for its own survival — notwithstanding its reservations about state-based parties.

Having wrapped up Bengal, the BJP has redrawn the political map. It has the east under its belt and is holding sway over the north (barring Punjab and J&K) as well as the west. Its support in the south remains patchy. Karnataka is the only state it is entrenched in; a breakthrough has eluded it in Tamil Nadu and Andhra Pradesh; it remains on shaky ground in Kerala, while it is growing incrementally in Telangana.

The BJP's growth and spread are inextricably linked to the Rashtriya Swayamsevak Sangh (RSS)'s expansion, although power at the Centre alters the equations between the ideological parent and its progeny now and then, triggering occasional outbursts on who rules the roost in the Sangh Parivar. However, it need not be stressed that in varying degrees, the RSS has been a source of sustenance to the BJP. The Sangh's original *karmabhoomi* was Rajasthan and Madhya Pradesh, but its work — intended to mobilise workers and propagate its ideology and convictions — did not transform into votes for the BJP's earlier incarnation, the Bharatiya Jana Sangh (BJS).

The path to power, both then and now, was traced through alliances with forces that were antagonistic towards the Congress, which was in an even more commanding position in the 1960s and 1970s than the BJP is today. The BJS combined with the Lohia Socialists and the Communists in the 1967 Lok Sabha elections in a coalition known as the Samyukta Vidhayak Dal and again in 1971 with the Socialists and the Swatantra Party despite the BJS's opposition to the Socialists' positions on land reforms, the recognition of Urdu and reservations. Its accord with the Socialists in 1977-79 and with the Left, Congress and Socialist factions in 1989 resulted in short-lived governments because the entente was loaded with contradictions.

> No bridge seems difficult enough to cross for the BJP and it could be a matter of time before the party adds a couple of southern states to its kitty.

But 1989 and the BJP's embrace of hardline Hindutva were the turning points in facilitating its journey towards attaining power on its own or with allies but largely on its terms. The strategy paid off as it stamped its footprint in the west and swaths of the north. The east beckoned, and how.

Assam was a low-hanging fruit that was first plucked by the state's Asom Gana Parishad (AGP) but not sufficiently savoured. The AGP was an offshoot of the All Assam Students' Association (AASU), a precursor to the campaign against *ghuspethiye* (infiltrators), who it insisted were Bangladeshi immigrants "illegally" encouraged by Congress regimes to cross the border that Assam shared with erstwhile East Pakistan. The dread it conjured up among the Assamese-speaking population of being outnumbered by the illegal immigrants caught the BJP's attention; the party's leaders like Jaswant Singh and Arun Shourie were often invited by AASU to address its cadre.

Once the AGP achieved a measure of success in 1985, the BJP sought its hand as an ally and the two fought a few elections jointly. Soon, the AGP was subsumed in a larger agenda that the BJP mapped out for Assam and the North-East and reduced itself to a smaller partner, which it remains even today. The BJP capitalised on the Sangh's groundwork in Assam and raised an edifice resting largely on "illegal" migration. Its success story has few parallels because the traction gained in Assam, a gateway of sorts to the North-East, helped build long-term bridges with other states which are at ideological variance with the BJP but depend on the Centre for grants and funds.

The BJP soon figured out that it must make an independent bid to get Left-ruled Tripura, a Hindu-majority state with 9 per cent Muslim population and a sprinkling of Christians among the tribes. Tripura was an integral part of the game plan to enhance its acceptability in the North-East that culminated in the formation of the North-East Democratic Alliance, which proposed to offer a neutral platform to its constituents to engage with the BJP and the Centre without joining the NDA. The saffron party dislodged the Left Front government in 2018, edged out the Congress and installed its first regime in Agartala. The BJP was re-elected in 2023.

In Odisha, another major eastern state, for long the BJP hung on to the coattails of the Biju Janata Dal (BJD) and its charismatic leader Naveen Patnaik, who was in power for almost a quarter century. After giving the impression that it was happy to play second fiddle to Patnaik in 2024, PM Modi and Shah's expansionist approach got the better of the outward bonhomie. Using the Odisha *asmita* (pride) as its campaign trope, the BJP tapped into a groundswell of resentment and anger at Patnaik's reliance on a Tamil Odisha-cadre bureaucrat, his inability to control dissidents and a general yearning for change. Patnaik was ousted and the BJP came to power.

In Karnataka, it used other elements in its toolkit, keeping the Hindutva sentiment generated by the Ram Janmabhoomi agitation in the backdrop. It attracted the Ramakrishna Hegde faction of the Janata Dal and subsequently managed to do business with the faction opposed to Hegde, and in the process captured the entire non-Congress space in the state. The BJP also inveigled the backing of the Lingayats, a powerful intermediate caste, through the only leader of substance it nurtured, BS Yediyurappa.

While Assam served as a successful entry point to the North-East, Karnataka did not help the BJP fan out in the south. However, no bridge seems difficult enough to cross and it could be a matter of time before the party adds a couple of southern states to its burgeoning kitty.

THOUGHT FOR THE DAY

"Democracy is a great institution and, therefore, it is liable to be greatly abused. —Mahatma Gandhi"

Let's respect each other's space

MINA SURJIT SINGH

FINDING parking space at the Estate Office is nothing short of an exercise in patience. During a recent visit, I found a slot right behind a "public convenience". As luck would have it, it was a windy day — the repulsive smell from the toilet, mingling with the aroma from a restaurant nearby, wafted across the surrounding spaces, while flies landed at will on the noses of visitors. Some of us were acutely conscious of this relentless assault on the olfactory sense, but there were others who went about their business unmindful of this odd combination of decay and fragrance.

Paradoxically, this very public convenience had become a huge inconvenience for those who had to cross its path. It appeared that sanitation workers had either been playing truant or given up in sheer exasperation at the total lack of civic sense among the people who visited it.

So, while I waited for my turn, I occupied myself with observing the behaviour of people who kept pouring in. Diagonally opposite my car, I noticed another one parked neatly in a designated parking space for four-wheelers. This vehicle, unfortunately, had to bear the brunt of all the two-wheelers parked askew by their owners, in complete disregard for the obstruction they were causing to the public, particularly to those who had to shuffle laterally or transversally through this disarray to reach the office.

One after the other, it was the same thing — park and let the others fend for themselves! It seemed as though these apathetic denizens had confined consideration and gratitude to the dark recesses of oblivion. Their cavalier attitude demonstrated an utter lack of social ethics and community well-being. Ironically, the very people who were concerned about getting their property registered had scant regard for public utilities.

In the midst of all this selfishness, there was this middle-aged man who conducted himself with savoir-faire that spoke volumes about his upbringing. He pulled out the two-wheelers in a way reminiscent of the legendary *Awadhi tehzeeb* to make way for those who couldn't manage to wend their way through the tight spaces. So, I bowed my head to his amazing courtesy amid the characteristic insouciance. After a while, he rode off, and sure enough, the space was blocked again.

In the rough and tumble of daily life, wouldn't things be much more agreeable if we respect others' space instead of pushing and jostling our way through a crowd? Long after I left the place, the image of the good Samaritan stayed with me as evidence that chivalry was still alive.

The writer is Professor Emeritus, Panjab University

LETTERS TO THE EDITOR

Disservice to Indian polity

Apropos of 'Time to revisit anti-defection law'; the 91st Constitutional Amendment Act, 2003, modified the anti-defection law, but it failed to deter elected representatives from falling prey to allurement of pelf and power. The Act needs to be amended, firstly, to incorporate a timeline for the presiding officer of the House concerned to take a decision in cases of defection. Secondly, the Act needs to direct the defecting legislators to resign and seek fresh mandate from the electorate to put the malaise of defections to a grinding halt. Those who facilitate crossovers are perhaps doing a disservice to the Indian polity.

RAJ KUMAR GOYAL, PATIALA

OPEC's decreased influence

Refer to 'India must look beyond UAE's OPEC exit'; with UAE's exit from OPEC (Organisation of the Petroleum Exporting Countries), there are bound to be some long-term effects, but may not cause significant disruptions. As UAE is getting free from the quota constraints, it will have to ramp up exports. The increase in energy exports by the non-OPEC countries over the years has meant that the body does not yield the kind of influence it once did. The UAE is planning to raise its oil production to almost double by next year. So the energy importing countries, especially India, could benefit from these increased energy supplies. New Delhi will have to remain alert to any possibilities and risks that may arise from a changing landscape in West Asia.

PL SINGH, BY MAIL

Strict FDI oversight needed

With reference to 'FDI push'; opening up the insurance sector to foreign investment is a significant step. With access to larger capital resources, insurance companies can expand their reach. They can serve their customers better by way of innovative products and advanced technology. But we should not lose sight of the fact that the insurance sector handles the savings of millions of citizens and allowing 100% foreign ownership may reduce domestic control. Indigenous smaller insurance companies will face intense competition. So, this move can boost growth and efficiency. But the government must ensure strict regulatory oversight to maintain a balance between foreign participation and national priorities.

BAL GOVIND, NOIDA

Turning patchwork into safety net

Apropos of 'Alert India'; a warning is only as good as the response that follows. Himachal's emergency response system proves that integrated control rooms and GPS-enabled patrols can deliver three-minute responses even in difficult terrain — yet most states lag far behind due to lack of manpower, training and infrastructure. Technology alone won't save lives; standardising response benchmarks, investing in local capacity and pairing every alert with a clear public outreach plan would turn today's patchwork into a genuine national safety net.

K CHIDANAND KUMAR, BENGALURU

Keep governance & religion apart

Refer to 'Akal Takht summons Sandhwan over anti-sacrilege law'; it raises significant concerns regarding the separation of legislative authority and religious intervention. While the sanctity of the Guru Granth Sahib is paramount, the Speaker represents a constitutional office that must remain independent of religious oversight to function effectively in a secular framework. Legislators are accountable to the electorate and the Constitution for laws passed in the House. Summoning the Speaker to the Akal Takht sets a precedent that may blur the vital lines between governance and religion.

BALBIR SINGH KAKKAR, JALANDHAR

Normalising exclusion as privilege

Apropos of 'Our fixation with hierarchy'; the article captures, with rare candour, a reality most of us witness daily yet hesitate to articulate. The obsession with rank — visible in offices, institutions and informal meetings — has quietly normalised exclusion and symbolic privilege. Such hierarchies shape behaviour at the cost of efficiency and dignity. Such reflections are essential if we are to move towards a more equitable and humane society.

SUNITA SIKRI, YAMUNANAGAR

Letters to the Editor, typed in double space, should not exceed the 200-word limit.
These should be cogently written and can be sent by **e-mail to: Letters@tribunemail.com**

A blossoming lotus in Bengal

SHIKHA MUKERJEE
SENIOR JOURNALIST, KOLKATA

THE lotus has finally blossomed in West Bengal. The state had long resisted the Bharatiya Janata Party's relentless efforts and vast resources to capture power, establish a double-engine *sarkaar* and complete its dominance over states north of the Vindhyas, barring the tiny territories of Jharkhand, Himachal Pradesh and Punjab, with Jammu and Kashmir as an outlier.

Dislodging Mamata Banerjee — a three-time Chief Minister, an iconic leader and a phenomenon in Indian politics — forced the BJP's central leadership into overdrive, as she had proved nearly impossible to unseat.

What ultimately defeated Mamata Banerjee was a carefully crafted strategy based on a granular assessment of weaknesses and strengths.

On the one hand, the precision of exclusions and deletions of voters through the Special Intensive Revision (SIR) of electoral rolls worked to the BJP's advantage. On the other, the wedges it planted helped prevent the Muslim vote from consolidating behind Mamata Banerjee.

The further consolidation of the Hindu vote by carving out a constituency of Hindu refugee settlers in the Matua and Namashudra belt as well as in the Rajbangshi territory, and the advantage the BJP saw in the resurgence of the Communists and the Congress worked together to deliver its victory bit by bit in Muslim-dominated districts and in South Bengal.

The infighting within the Trinamool Congress, exacerbated by the 73 new candidates the party fielded, affected its capacity to win.

By targeting the erosion of governance, with party control overtaking the police and administration in the 15 years of the Trinamool Congress's unchallenged domination, along with all other variables, the BJP succeeded in capturing the elusive jewel in the crown, West Bengal.

It required the concerted efforts of the BJP's master planners and managers, men like Prime Minister Narendra Modi, Home Minister Amit Shah and Environment Minister Bhupender Yadav to fight and win against the one-woman party of Mamata Banerjee.

The consequences of Mamata Banerjee's defeat are not limited to West Bengal. It will affect the morale of the loose confederation of parties in opposition to the BJP under the INDIA collective banner. The downfall of the Trinamool Congress in West Bengal means that the BJP is the ruling party across North India while it is not in power in the southern states of Kerala, Tamil Nadu, Karnataka and Telangana.

DECISIVE: The BJP's determination matched voters' expectations for change. PTI

As an icon of resistance to the BJP's domination, Mamata Banerjee's defeat erodes her stature, but it may increase her nuisance value if she can figure out how to use it, without looking like a sour loser.

The undercurrent that contributed to the BJP's success was the feeling that Mamata Banerjee's party had to go; any change was better.

> The BJP has won in West Bengal, but uneasy lies the head that wears the crown. It has to find a chief minister to head the government.

The BJP's determination matched voters' expectations for change and that the BJP would be a better option. It led to the nearly two-third majority that the party won. The same undercurrent articulated an entirely new consciousness among voters: that if the BJP failed to be satisfactory, it would be rejected in another election.

Since 1952, West Bengal has had three ruling regimes, except for the 10 years between 1967 and 1977, when there were unstable coalitions. It takes voters in West Bengal to make up their minds about regime change and the BJP is tenacious once it seizes power. How the state negotiates its relationship with the BJP will be interesting to watch.

The BJP has won in West Bengal, but uneasy lies the head that wears the crown. It has to find a chief minister to head the government. Its current crop of leaders, including Suvendu Adhikari — who helped keep the BJP at the centre of attention — has not been anointed as the Chief Minister.

There are cracks within the state BJP that need to be dealt with. The party's response to questions on leadership is classic — the headquarters will decide. The subtext is that all important decisions will be taken in Delhi, by the Prime Minister and Home Minister and perhaps some other top leaders of the BJP, not by people in West Bengal.

As a short-term exercise, the fissures and cracks in West Bengal could be managed to deliver the BJP its much-desired victory in West Bengal. Over the next three years, until the 2029 Lok Sabha elections, the BJP will have to make sure that it is seen to be working for the changes it promised to voters.

For the election, the EC pulled out all the stops by roping in 2.5 lakh Central security forces, administrative and police officials from mostly BJP-ruled states, transfers and appointments of local officials and more or less taking over the day-to-day management of the basic functions of governance, particularly law and order.

That, however, is a temporary state of affairs; how the BJP handles a smooth transition from centralised administration to a routine state administration will be a tough call.

To fulfil its campaign promises, the BJP has to deliver cash into the hands of women and unemployed youth on the one hand, implement zero tolerance to *ghuspaithiyas* (illegal, primarily Muslim, infiltrators) by deporting them, roll out the Uniform Civil Code, enforce the amended Waqf Act, seal the borders with Bangladesh and fulfil Modi's guarantee of giving citizenship to Hindu refugees — Matuas, Namashudras, Rajbangshis and others.

The first set of promises requires that the new government finds the money that the BJP has insisted West Bengal does not have to squander on *"revdis"* (doles). For the second set of promises, the BJP will have to deal with resistance, if West Bengal reacts as it has done in the past to social destabilisation. For the third set of priorities, the BJP will have to figure out where to deport the *ghuspaithiyas*. Bangladesh is perfectly clear that there are no Bangladeshi *ghuspaithiyas* in India. The question is: where will those identified and deleted as *'ghuspaithiya'* voters by SIR go?

Vijay's secular win eases BJP's southern push

SOUTH SIDE

NIRUPAMA SUBRAMANIAN

AS in his countless films, Vijay has emerged as the victorious hero, this time in his electoral debut, vanquishing his rivals. Vijay's party, the Tamilaga Vettri Kazhagam (TVK), has decisively trounced the ruling DMK-led Secular Progressive Alliance and the AIADMK-led National Democratic Alliance.

The Vijay wave did not spare even Chief Minister MK Stalin. He lost in Kolathur, from where he was elected hands down in the previous three elections, to a former DMK worker who joined the TVK earlier this year after being sidelined by the DMK.

Powered by votes from the young, women, minorities and Dalits, and the strong anti-incumbency against the DMK government of Stalin, Vijay's historic victory has all the makings of the kind of political shift that Tamil Nadu has seen only twice before: in the defeat of the Congress by the DMK in 1967, and of the DMK by the breakaway MG Ramachandran-led AIADMK in 1977. Unlike the AIADMK that had a pre-election alliance with Left parties, the TVK went solo in this election.

The Tamilaga Vettri Kazhagam, a two-year-old outfit, is poised to win about 107 seats, with 118 required for a majority. The DMK, which in 2021 won 133 seats on its own and 159 along with its SPA partners, was trailing far behind with some 70-plus seats, with the AIADMK at the third place. Other DMK bigwigs, including several ministers, were felled across the state.

The DMK wunderkid, Palanivel Thiaga Rajan, has also lost. His constituency houses the famous Madurai Meenakshi temple and was being eyed for its potential for communal polarisation, particularly as it is next to Thiruparankundram, where an old land row between the managements of a temple and a dargah has created communal disturbances in recent months.

The saffron party fielded C Sundar, husband of actor Khushboo, the party's Tamil Nadu unit vice-president. But in an ironic twist, the winner is Madhar Badrudeen, a Muslim candidate and a newcomer to politics, put up by the TVK, a party whose secular credentials are a silver lining of this election in which people voted for "change" without knowing what Vijay intends to change and how.

Despite the mega shift away from the two Dravidian parties, the likelihood of a hung Assembly remains high. The TVK's tally is short of the majority mark despite coming tantalisingly close to the magic number of 118 in the 234-seat Tamil Nadu Assembly. The Congress could be a natural partner.

Vijay, whose full name is C Joseph Vijay, is a Christian. In recent times, he has visited churches, mosques and temples, seeking to consolidate various religious communities behind him. He has also broken away a significant chunk of Dalit votes from the traditional representatives of the community, such as the Viduthalai Chirthaikal Katchi.

STAR POWER: The vote for the superstar seems to have been driven by emotion rather than by politics. PTI

The Congress had reached out to him before the election, but abandoned the effort mid-way. The Pattali Makkal Katchi, which is now led by Anbumani Ramadoss, son of the founder, Dr S Ramadoss, is also a candidate, as it has no big differences with the TVK. A hung Assembly has always been a happy hunting ground for the BJP; so no party should be counted out.

In a state where the ruling party gets voted out every five years, the DMK believed it would be able to repeat what Jayalalithaa had pulled off in 2016 by leading the AIADMK to a second successive win.

> The big sign the DMK feared Vijay's popularity, more than it dared to acknowledge, was its failure to file an FIR against him after the Karur stampede in which 40 died.

The DMK thought it could achieve this by side-stepping anti-incumbency and framing this election as a battle to keep intact India's federalism against the BJP's centralising tendencies and as a battle against Hindutva.

It focussed on cultural issues, such as the imposition of the Hindi language and the archaeological significance of Keeladi, and on the Centre's alleged partisan treatment in the allocation of finances, all of which were set to the "south-vs-north" tune. In all this, the AIADMK's alliance with the BJP was good campaign meat for the DMK. But TVK was the X factor. Stalin believed he could outwit Vijay by just refusing to acknowledge him as a threat. Clearly, none of this resonated with the voters.

Vijay, on the other hand, kept his focus on the DMK, highlighting allegations of corruption against the party and its leaders and questioning Stalin on his government's law and order record.

Vijay's voters likely included a record number of women, many of them believing that he would do more to "protect" them. Stalin's flagship programme, the Kalaignar Magalir Urimai Thittam (Kalaignar Women's Rights Grant Scheme), which gave eligible women an assured sum of Rs 1,000 per month, was all but forgotten as women gravitated to Vijay en masse.

However, something more was also at work in Vijay's favour. His voters appear to have connected with him not for any particular election promise, which also includes Rs 2,500 per month for women-headed households, eight grams of gold and a silk saree for marriages and six free LPG cylinders annually.

It is clear that beyond a point, populist promises no longer help parties win elections. The AIADMK too promised Rs 2,000 and a host of other schemes. Such schemes are now taken for granted by the Tamil Nadu voter.

The vote for Vijay seems to have been driven by emotion rather than by his politics or ideology, of which little is known, as he has never given any media interviews.

Take, for instance, the stampede in Karur during a rally held by Vijay last September. Had it occurred at a DMK or AIADMK rally, the political leader at the spot and the party leadership could not have escaped blame for the 40 deaths which occurred that night.

But the victims of the Karur rally were convinced their hero was blameless, and were easily convinced that it was a conspiracy by the DMK to show Vijay in a bad light. The big sign that the DMK feared Vijay's popularity, more than it dared to acknowledge, was the government's failure to register an FIR against the star after the stampede. The challenge for Vijay now is to build a party with real workers instead of fans and find people with experience and calibre to help run both party and the government. It will be chaotic.

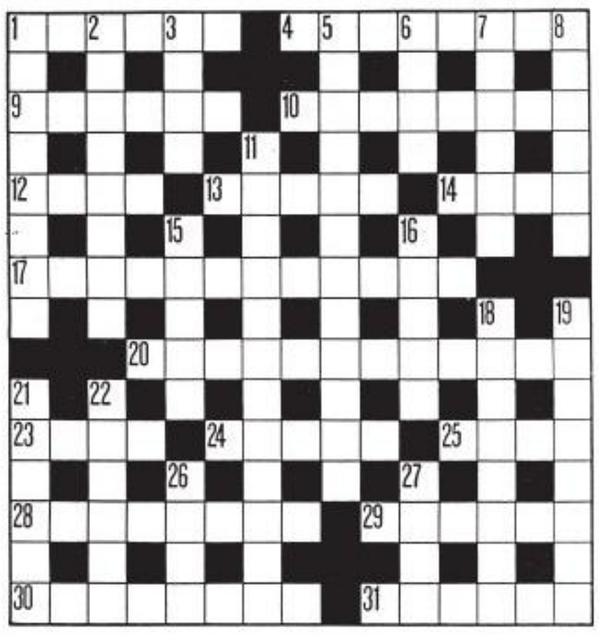
With a likely hung Assembly and the formation of a TVK-led coalition government, or a TVK government with outside support, Tamil Nadu can kiss goodbye to the stability of the last few years.

The last time the state was led by a minority government was in 2006, when the DMK formed the government with outside support of the PMK. The PMK was, however, a pre-election partner. The DMK has always been a formidable opposition party. Stalin's son Udaynidhi, who is among the DMK winners, has to prove his chops.

The comparison with Vijay, who is a couple of years older, will be inevitable in the political arena as it was in the world of films. He will need to show he can keep the inexperienced TVK on its toes, in the Assembly and outside. The AIADMK will be out to prove that it is not finished.

After winning West Bengal, the Modi-Shah election-winning machine will turn its focus to a state that has thus far thwarted the saffron party but is a Dravidian bastion no more.

QUICK CROSSWORD



ACROSS

1 Acquire (4,2)
4 In an unsuspecting state (3,5)
9 An improvement (6)
10 A contract (8)
12 Lie in ambush (4)
13 Plunder (5)
14 Silent (4)
17 In an embarrassed manner (12)
20 Position between extremes (6,6)
23 To praise (4)
24 Frighten (5)
25 Self-control (4)
28 Felonious (8)
29 Stir up (6)
30 Bad verse (8)
31 Stylish (6)

DOWN

1 Surly (8)
2 Relevant (8)
3 Scantily provided (4)
5 Sincerely (4,3,5)
6 Exultant delight (4)
7 Counting frame (6)
8 Be indecisive (6)
11 Behave obsequiously (3,3,6)
15 Be worthy of (5)
16 Oppressive public attention (5)
18 Commercial activity (8)
19 Great adulation (8)
21 Peaceful (6)
22 Currently in force (6)
26 Calamitous (4)
27 Work laboriously (4)

Yesterday's Solution

Across: 1 Droll, 4 Bestrew, 8 Lee, 9 At a glance, 10 Misdeed, 11 Cleft, 13 August, 15 Athens, 18 Voter, 19 Trachea, 21 Viewpoint, 23 Doe, 24 Deflect, 25 Rowdy.

Down: 1 Dilemma, 2 Oversight, 3 Leave, 4 Brandy, 5 Solicit, 6 Run, 7 Wheat, 12 Eyeshadow, 14 Scruple, 16 Slavery, 17 Strict, 18 Vivid, 20 Actor, 22 Elf.

SU DO KU

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

EASY

YESTERDAY'S SOLUTION

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

CALENDAR

MAY 5, 2026, TUESDAY

- Shaka Samvat 1948
- Vaisakh Shaka 15
- Vaisakh Parvishte 22
- Hijari 1447
- Krishna Paksha Tithi 4,
- Shiva Yoga up to 12:17 am
- Jyeshtha Nakshatra up to 12:55 pm
- Moon enters Sagittarius sign 12:55 pm

FORECAST

SUNSET: TUESDAY 19:02 HRS
SUNRISE: WEDNESDAY 05:36 HRS

CITY	MAX	MIN
Chandigarh	32	21
New Delhi	33	22
Amritsar	37	22
Bathinda	39	21
Jalandhar	36	22
Ludhiana	38	17
Bhiwani	39	21
Hisar	39	19
Sirsa	38	19
Dharamsala	26	15
Manali	19	08
Shimla	22	12
Srinagar	22	09
Jammu	34	24
Kargil	----	----
Leh	16	05
Dehradun	30	18
Mussoorie	21	15

TEMPERATURE IN °C

THE GOAN EVERYDAY

Do not take life too seriously. You will never get out of it alive.
Elbert Hubbard

BJP's Bengal, Assam wins and the subtle messaging for Goa

The Bharatiya Janata Party's victories in West Bengal and Assam are not just another addition to its electoral tally, but they mark a deeper shift in how Indian politics is being contested and won. The BJP went into a celebratory mode, holding rallies in Goa. It was like a political war that had just been won. For Goa, these results offer both a playbook and a warning as it navigates the path to 2027.

The BJP clinically dislodged the long-entrenched regime of the Trinamool Congress led by Mamata Banerjee, in a State where regional identity has historically shaped political loyalty. Assam, meanwhile, reaffirmed the BJP's growing grip over the Northeast, a region that used to sit on the margins of national political calculations. For decades, states like West Bengal were seen as impermeable to national parties. This election has shown a voter base that is more open to national narratives built around welfare delivery, governance, and identity.

The BJP has successfully bridged traditional Assamese nationalism with Hindutva, leading to a strong consolidation of Hindu votes. It also successfully cultivated a narrative of being the sole protector of Bengali Hindus against alleged minority appeasement by the TMC. The increased voter turnout and polarisation in regions like North Bengal and the border districts worked to the BJP's advantage. It has been a long-term effort by the Sangh Parivar to penetrate regions outside the traditional BJP bastions, and it has succeeded in great measure, although it failed in Tamil Nadu .

Goa's politics has always had its own rhythm because it was largely personality-driven, and often fragmented. But that insulation is thinning, and newer faces are making their presence felt. The BJP, across India, has shown a consistent ability to stitch together broad voter coalitions, particularly among Hindu communities that are otherwise diverse and segmented. In Goa, where demographics can decisively shape outcomes, this kind of consolidation appears unlikely, but if that happens, it could considerably tilt the balance. Experts opine that the current communal crossfire seen in the State is a calculated move in that direction.

The BJP's messaging of development and welfare of citizens has often left the opposition a narrow space to challenge it. In Goa, it would mean parties going beyond criticising the BJP and offering a clear and credible alternative. Against a well-orchestrated BJP machinery, which is currently high on confidence, the Opposition, if disjointed, can find itself decimated like in other States. The most unfortunate part is that politicos in Goa are not ready to learn lessons from past failures. The run-up to the eventually called-off Ponda by-poll shows how fragile the Opposition space is.

One of the more under-appreciated aspects of the BJP's Bengal campaign was how it adapted its messaging to local cultural cues and how it effectively checkmated the "outsider party" narrative of the TMC. The lesson here isn't about imitation but translation in taking broader political themes and grounding them in the State's distinct identity. Modi's appeal lies in blending identity with aspiration and projecting both cultural confidence and economic ambition. The Hindutva plank, when paired with development messaging, has proved to be a durable electoral combination.

The BJP's performances in West Bengal and Assam are less of a one-off surge and more of how elections are being reshaped across India. For Goa, the message is straightforward that parties will need a solid organisational network, clarity of narrative, and a complete stress on local sensitivity. Together, this will be decisive in 2027.

OPEN SPACE ››

MLA's car chase depicts sense of responsibility

In a time when public faith in leadership often wavers, acts of courage and responsibility stand out with striking clarity. The recent incident at Dabolim, where a 60-year-old woman tragically lost her life in a hit-and-run accident, could have easily become just another statistic in the growing list of road fatalities. Sankalp Amonkar, the Mormugao MLA, did not limit his response to the expected calling for medical assistance or waiting for law enforcement to take over. While ensuring that help was on the way, he made a split-second decision and chose to pursue the fleeing driver. Amonkar engaged in a high-speed pursuit covering 12 kilometres that was dramatic and fraught with risk. This was not a calculated political move but an instinctive act driven by a sense of justice and responsibility. The chase ended at a dead end, where the driver was finally apprehended and handed over to the police. Amonkar's decision to go a step further and chase the fleeing driver reflects presence of mind, courage, and an unwillingness to tolerate wrongdoing. The MLA's actions deserve public appreciation and recognition by the government as an example of proactive leadership.

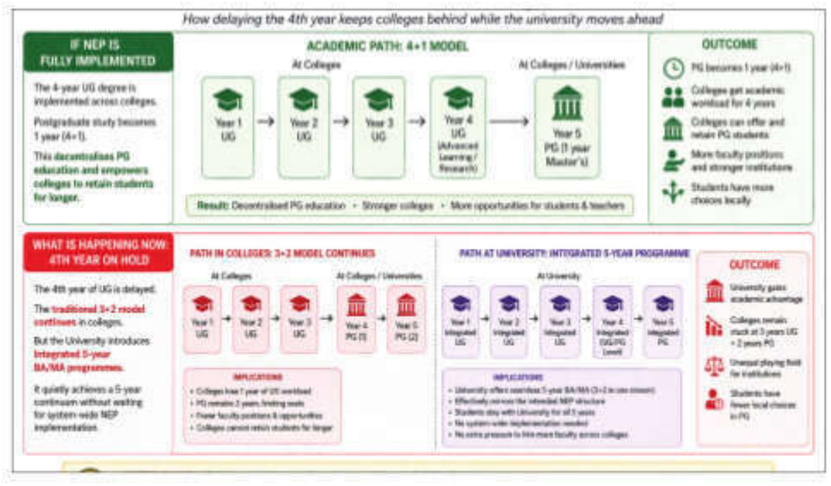
ADELMO FERNANDES, *Vasco*

Stalled reform, strategic realignments

The question is no longer whether Goa is ready for the fourth year—but who benefits from its absence

›The writer is an assistant professor in Political Science at DCT's Dhempe College of Arts & Science, Miramar

SAINANDAN SRIDHAR IYER



The recent decision by the Goa government's Directorate of Higher Education to place the rollout of the four-year undergraduate programme under the National Education Policy 2020 on hold is being framed as a cautious, consultative pause. Officially, the concerns include academic alignment, infrastructure readiness, and institutional capacity; all appearing to be reasonable at first glance. Yet beneath this administrative language lies a more consequential shift: the steady marginalisation of undergraduate colleges within Goa's higher education ecosystem.

Politics of delay & unpreparedness

At the heart of the issue is workload, both academic and institutional. The introduction of a fourth year in undergraduate programmes was not merely a curricular expansion; it represented a structural recalibration that would have significantly increased teaching hours, course offerings, and, crucially, the need for permanent faculty appointments across affiliated colleges. By delaying this transition, the state effectively suspends the expansion of academic labour demand in these institutions. This is not a neutral pause; it is a contraction by deferral.

For years, colleges have operated under conditions of constrained recruitment, with temporary appointments, delayed regularisation, and stagnant salary structures for contractual and lecture-basis staff. The fourth year under NEP promised a partial correction, including an institutional justification for hiring, promotion, and departmental expansion. Its postponement now prolongs a system where academic precarity is normalised. In this context, the argument that financial liabilities necessitate caution rings hollow. Public spending priorities in Goa—and indeed across India—have rarely been governed by strict austerity when it comes to subsidies, infrastructure projects, or politically visible expenditures. To suddenly invoke fiscal prudence in the domain of higher education suggests not constraint, but choice.

Myth of academic alignment

The state's reliance on "academic alignment" as a justification becomes even harder to sustain when one examines the internal logic of the NEP transition itself. The restructured three-year model has already thinned out disciplinary engagement, redistributing a noticeable portion of credits away from core subject learning.

> **The postponement of the four-year undergraduate programme disproportionately affects colleges, constrains faculty growth, and limits student pathways, while simultaneously enabling Goa University and private players to consolidate their positions**

The fourth year was meant to restore that balance by deepening specialization and integrating research-oriented work. By withholding it, the system effectively freezes students in an academically diluted framework while simultaneously claiming to protect academic standards. What is presented as caution thus begins to resemble a structural inconsistency: the reform is paused at precisely the point where it was meant to correct its own limitations.

Simultaneously, the move by Goa University to expand its integrated five-year BA/MA programmes demands closer scrutiny. Marketed as an innovative alignment with NEP's multidisciplinary vision, these programmes may in fact represent a strategic consolidation of academic capital at the university level. By offering a seamless five-year pathway, the university effectively insulates itself from the structural uncertainty created by the delayed four-year undergraduate rollout.

Who gains, who waits

The implications are significant. Under a fully implemented NEP framework, a four-year undergraduate degree would typically compress postgraduate study into a one-year master's programme (4+1). This would naturally decentralise postgraduate education, potentially empowering colleges to retain students for longer durations.

However, in the absence of the fourth year, the traditional 3+2 model persists—except that the university, through its integrated programmes, can quietly transition to a 5-year continuum that mirrors the intended NEP structure without formally adopting it system-wide.

This creates an uneven playing field. Colleges remain locked in a truncated three-year cycle, while the university captures students earlier (after Standard XII) and retains them longer. The promise of academic mobility and multiple entry-exit points, central to NEP's philosophy, is selectively operationalised in ways that privilege institutional hierarchies.

Equally troubling is the labour dimension of these integrated programmes. Unlike the expansion of undergraduate teaching across multiple colleges, which would necessitate widespread faculty recruitment, the integrated model centralises teaching within the university.

This reduces the pressure to hire new faculty at scale, thereby limiting employment opportunities for early-career academics. At a time when higher education requires intellectual renewal and generational turnover, such consolidation risks deepening structural stagnation.

Overlaying this is the growing presence of private universities, aggressively marketing their graduate programmes across the state. These institutions, unencumbered by bureaucratic delays, are quick to align with NEP frameworks, offering four-year degrees, interdisciplinary majors, and global exposure.

The result is an increasingly competitive and fragmented higher education landscape in Goa; one where government and aided colleges find themselves squeezed between a strategically expanding state university and a rapidly advancing private sector.

Precarity by design

What emerges, therefore, is not merely a delay in policy implementation, but the formation of a complex web of institutional advantage. The postponement of the four-year undergraduate programme disproportionately affects colleges, constrains faculty growth, and limits student pathways, while simultaneously enabling Goa University and private players to consolidate their positions. If the NEP is to be more than a rhetorical commitment, its implementation must be equitable across institutional tiers. Otherwise, reforms risk becoming instruments of centralisation rather than democratization. The question is no longer whether Goa is ready for the fourth year—but who benefits from its absence.

THE INBOX ››

Don't rely on panchayat to file your complaints

It's highly disappointing to see various complaints of irregularities or illegalities in constructions are being ignored by the Benaulim Panchayat for many weeks. It appears to me that panchas at Benaulim are compromised by the erring builders. I request the concerned Benaulim villagers who are filing complaints not to rely on the Benaulim Panchayat. If no action is taken in a week's time the matter should be immediately escalated to the BDO, DOP and even legally, before the courts of law. Also at the next Gram Sabha, villagers must gather in large numbers and challenge all the panchas.

ARWIN MESQUITA, *Colva*

Rhetoric doesn't count in geopolitics

Last week at the SCO Defence Ministers' meeting in Kyrgyzstan, Rajnath Singh strongly condemned state-sponsored cross-border terrorism, calling it the most serious threat to the global order. He urged a united, zero-tolerance approach, asserting that "terror epicentres" are no longer beyond the reach of consequences - a remark referencing India's response to the Pahalgam attack. But the global landscape has shifted. The so-called "war on terror" is no longer the central axis of international politics. Today, conflicts are increasingly driven by control over critical resources, strategic trade corridors, and evolving geopolitical alliances. Raising domestically charged rhetoric in a forum where most member states are closely aligned with China and Russia and, by extension, maintain ties with Pakistan, comes across as out of step with the forum's strategic realities. At a time when credibility is already under strain, whether due to positions on Israel, perceived silence on Iran, or reluctance to engage with initiatives like de-dollarisation within BRICS - who would see value in deeper alignment under these circumstances? Why would any member nation care about a bilateral issue?

VINAY DWIVEDI, *Benaulim*

Khattar failed to disturb communal harmony

The recent handling of the case involving Gautam Khattar, accused of making derogatory remarks against St Francis Xavier, raises serious concerns. Brought back to Goa from Himachal Pradesh just last week, he was scarcely held in custody and instead shifted between hospitals citing chest pain. Soon after being granted conditional bail on May 2 by the JMFC Vasco court, his health complaints seemed to vanish. What followed was equally troubling. Khattar publicly criticised Goan journalists for not supporting him, while being welcomed with slogans by supporters. Such scenes send a disturbing message. If he truly had conviction in his words, he would have stayed back and faced public scrutiny rather than leaving the state and seeking refuge. It is deeply unfortunate that individuals who insult religious sentiments later attempt to lecture the media and society. Goa has always stood for communal harmony and mutual respect. The media here continues to play a responsible role in informing and uniting people. Goans neither need nor appreciate divisive commentary from outsiders.

JERRY FERNANDES, *Saligao*

AAP and BJP: Two sides of the same coin?

Two non-bailable FIRs have been filed by the Punjab police, against AAP MP Sandeep Pathak, days after he switched over to the BJP. Look at the timing. This is clearly vendetta, using state machinery to intimidate. If there was any truth in the matter why were these cases not filed earlier, why only after he joined the BJP? So either he was protected while he was an AAP member in spite of being crooked, or these cases are fake.These have been the tactics of the BJP, we have all seen their washing machine manoeuvre where people who had criminal cases took shelter under the BJP umbrella and lo and behold, all cases vanished into thin air. Is there anything decent left about that party to talk about? AAP is simply a virulent strain of the BJP, perhaps much worse. They are two sides of the same coin.

MISHA, *Varca*

Repair drainage systems in Chandor–Cavorim

Most of the water drainage systems in the Chandor–Cavorim Village Panchayat areas are blocked, damaged, and poorly maintained. For years, these drains have been neglected, leading to serious sanitation concerns. With the monsoon season approaching, timely planning and execution of repairs is essential. Simply removing mud on the surface is not a long-term solution—damaged structures, broken channels, and improper flow systems must be fully restored. Blocked drains lead to waterlogging, foul smells, and breeding of mosquitoes, increasing the risk of diseases. Proper drainage is a basic requirement under the Swachh Bharat Mission, which emphasizes cleanliness and public health. The Village Panchayat must take responsibility for regular inspection, desilting, repair, and long-term maintenance of drainage systems. Public funds should be used effectively to ensure proper sanitation infrastructure. If immediate action is not taken, residents will face severe inconvenience and health hazards during the monsoon.

RONNIE DSOUZA, *Chandor*

Send your letters to us at editor@thegoan.net. Letters must be 150-200 words and mention the writer's name and location

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Winds of change: Rising hero, fallen bastions

The Assembly elections in four states and one Union Territory saw a big vote for change in three states and a mandate for continuity in one state and the UT. West Bengal and Tamil Nadu saw tectonic political shifts, with the Bharatiya Janata Party (BJP) poised for power in the former and the Tamilaga Vettri Kazhagam (TVK), led by actor Vijay, set to dethrone the Dravida Munnetra Kazhagam (DMK) in the latter. Kerala will see the Congress-led United Democratic Front (UDF) return to power on a bumper vote and a sweeping rejection of the CPM-led Left Democratic Front (LDF). The victory of the BJP-led coalition in Assam and the NDA coalition (comprising the BJP and the All India Anna Dravida Munnetra Kazhagam) in Puducherry was expected, and the incumbents improved their positions.

For the BJP, West Bengal has been a final frontier among the major states, where it has crossed the two-thirds majority. The party was nowhere in the state's electoral landscape in 2011, but has steadily improved its position since then, using a combination of political nous and assertions of power. It attracted leaders from other parties, used its power at the Centre effectively, and successfully adopted social engineering as a political strategy. Polarising narratives have also been part of the playbook, placed as a counter to the Trinamool Congress (TMC)'s traditional Muslim vote base. The BJP gained from branding the TMC as anti-Hindu and supportive of illegal immigrants. Its campaign was largely pegged to issues such as undocumented migration, corruption, unemployment, and lack of women's safety. The Election Commission of India (ECI)'s Special Intensive Revision (SIR) of electoral rolls may have hit the TMC's numbers. However, none of these factors would have affected the TMC if there were no strong resentment against the party, which has ruled the state for three terms. Among the youth, the anxieties over the lack of opportunities are palpable. Mamata Banerjee's support among women seems to have waned. Her loss in Bhabanipur reflects a collective shift in the voters' mood. The RG Kar Medical College rape and murder dented the government's image among women, especially among urban women. It is in this climate of discontent that the BJP made promises of development, good governance, and secure borders. This message of change, delivered by Prime Minister Narendra Modi and Home Minister Amit Shah, appears to have found takers across sections. A Hindu consolidation in many constituencies is also likely to have helped the party.

Anti-incumbency is the headline theme as election results reshape regional power dynamics and signal caution to the national Opposition

Tamil Nadu has witnessed electoral history, with the DMK led by M K Stalin losing heavily to a party formed two years ago and considered capable only of a marginal impact. This stunning defeat shows that the sentiments against the government were strong over issues such as corruption, nepotism, and misgovernance. Stalin's defeat in his stronghold in Kolathur best exemplifies the trend. Support for the DMK appears to be eroding significantly across all sections, especially among Dalit and minority groups. In a significant turnaround, a new party riding on the charisma and mass appeal of its leader has toppled a government and a political model built on the Dravidian identity. Tamil Nadu has always had strong links between its politics and its cinema. Vijay was at the right place to seize the moment. Notably, this is for the first time in six decades that a party and a leader without any stated credentials of the Dravidian ideology is rising to power in the state. The AIADMK, which has been grappling with a leadership crisis and political setbacks since J Jayalalitha's death in 2016, has lost further ground.

For the Congress, there is relief in the big win in Kerala, where the UDF led by the party registered a victory with two-thirds majority. The LDF government, in power for 10 years in a state that has historically seen rival alliances alternating every five years, has been hit by a strong wave of anti-government sentiment. The ruling front suffered heavy reverses, with many of its ministers and senior leaders losing their seats. A consolidation of votes in the Muslim and Christian communities appears to have pushed the mood further towards the UDF, leading to a sweep for the opposition bloc. For the first time, the BJP won three seats in the state – a commendable show, even though the party had hoped for bigger numbers. In Assam, the electorate has extended its endorsement of the incumbent BJP, which has been in power in the state for 10 years. Chief Minister Himanta Biswa Sharma has followed a policy of polarisation, both in governance and stated political positions. The no-holds-barred approach has helped the BJP to improve its position in a state that is already divided along communal lines.

On the national stage, the poll results point to a weakening Opposition. Both the TMC and the DMK have been pillars of the opposition grouping, with Mamata and Stalin among the staunchest of critics of the BJP and its allies. They stand diminished now. Their defeat also signals the enfeeblement of regional political forces that were considered capable of resisting the BJP onslaught. States such as Maharashtra and Bihar have already witnessed the decline and fragmentation of regional parties. The 2026 results risk extending this pattern. In the Left's defeat in Kerala, there is another blow to the larger national opposition: for the first time in five decades, no government in India will have a Communist presence.

SHIFTING STATES

Big sweeps and some questions that count

In polls that signify decisive change, the BJP is the big gainer. But its surge in West Bengal may still face a test of trust

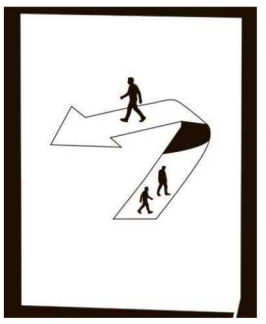
JAGDISH RATTANANI

The election results from West Bengal, Tamil Nadu, Kerala, Assam, and Puducherry on the surface are a boost for the Bharatiya Janata Party (BJP) and its style of electioneering – brash, in your face, communal, and broadly free of restrictions that would apply to other parties under the Election Commission of India (ECI)'s model code of conduct. If Assam is seen as a predictable BJP victory and Tamil Nadu as a favourable BJP result—one where the strong anti-BJP voice of the Dravida Munnetra Kazhagam (DMK) under M K Stalin has been reined in—West Bengal is the prize that would make the BJP stand out and the Opposition cry foul.

The state that has resisted the saffron advance for decades finally makes way for the BJP in a bitterly contested election against the incumbent Chief Minister Mamata Banerjee and her Trinamool Congress (TMC), but this is a result not without its concerns and complexities. This is the first time that the BJP will take power in West Bengal. This clearly represents a tectonic shift in Bengal's political landscape and will impact the nation's politics. The state, led by the Communist Party of India (Marxist) for over 23 years and by the TMC for 15 years, now goes to the BJP.

But the West Bengal result raises important questions about the fairness and robustness of the election process itself, and to the extent that it may erode faith in the process, it brings other elections and results into doubt. This strikes at the roots of the democratic form of government in ways all too obvious, but these worries will be easily brushed aside by the BJP in the first flush of victory. The party will be unwilling and unable to see the price this victory will exact on the nation, particularly if serious questions on the deletion of voters under the Special Intensive Revision (SIR) of voter rolls are not answered.

At the time of writing this, the BJP's leads and wins together were above 200 in the West Bengal Assembly of 294, while the TMC's were in the mid-80s. The BJP's vote share stood at 45.4% towards the evening, above TMC's 40.85%, according to the ECI's live data. The numbers will change as more results come in. In the most recent election, the Lok Sabha polls of 2024, the BJP's vote share was 38.73%, behind TMC's 45.76%. In the two years between two key elections, the BJP in West Bengal has registered dramatic growth: its vote share trailed the TMC



by 7.03 percentage points, and now it leads by 4.55 percentage points. If indications are that the SIR appears to stand as a plausible cause for the party's dramatic emergence in West Bengal, there will be a lot of discomfort with the results, and a lot for the ECI to answer.

Expanding footprint

In Tamil Nadu, the result has delivered a surprising reversal for the DMK. The Tamilaga Vettri Kazhagam (TVK), founded by actor-turned-politician Vijay, is in the lead with over 100 seats, with the DMK coming in as the second largest party at 62. With counting still on at the time of writing this, it is not clear if Vijay's party will secure the 118 seats required to form a government. Yet, the emerging picture is of the TVK on its own or with support from other groups or alliances taking power in the state. This, too, represents a monumental shift in the politics of Tamil Nadu and of India. This is the first time in over 50 years that Tamil Nadu would have broken away from the politics of the DMK versus AIADMK that the state has witnessed every election.

It is too early to say what this means or how Vijay will play out as the Chief Minister, particularly in his relationship with the BJP. Vijay has opposed the BJP's pet scheme of 'one nation-one election' and has in the past described the BJP as an ideological foe and the DMK as a political rival. Yet, the BJP may wish to have him on its side if only to stem criticism against the party and, in return, to have better relations with a state that has been a bold opponent of its politics.

In Kerala, the Congress-led United Democratic Front (UDF) has come to power after a decade, with its tally crossing 100 in a House of 140. The BJP has won three Assembly seats for the first time, in some sense an achievement given the party's poor electoral history in the state. Much can be made of this slow enlarging of the BJP footprint in a state that has consistently resisted the BJP, but it also shows that determined campaigning with special efforts can turn the tide. This calls for an equally spirited, determined, and vigilant Opposition.

At the end of the day, this is a political battle that shows the BJP to be an unstoppable steamroller, now controlling power across the North, the West, and the East. The Opposition parties, which have been unable to come together with a cogent way to stand up and fight the political fight for the long haul, will have to once again think of the road ahead. It is clear that the BJP of today will stop at nothing in doing the deals it needs to take power: from breaking political parties and using the investigative agencies to raising the communal pitch in politics. If this must be challenged, the Opposition will have to set aside its differences, unite, and rebuild with principles and values long lost to Indian politics.

(The writer is a journalist and faculty member at SPJIMR; Syndicate: The Billion Press)

RIGHT IN THE MIDDLE

From peels to plenty

The pleasures of gardening are unparalleled

PREETI ARANHA

I was pleasantly surprised one morning when I found little plants in our pot. They looked like vegetable plants, but we couldn't quite figure out what exactly they were. As they grew, the leaves took on an artistic cut, like delicate lace work along the edges, almost ornamental in their beauty.

It was a delight to watch the plant turn into a creeper, its tendrils reaching out and clinging gently to the railing. We kept wondering which vegetable it might be, recalling how I had emptied a dish of assorted seeds and peels into the pot. Soon, small yellow flowers began to appear; fingers crossed, we hoped they would not all drop off. The few that remained slowly swelled and revealed themselves as little bitter gourds. Our happiness knew no bounds.

After a few days, the bitter gourds were ready to be plucked, and a succulent dish of bitter gourd became the star of the dining table. The family loved it, and the long, much-ignored vegetable turned into the star attraction among all the plants. I replanted the seeds, and more plants came up; now we knew what treat to expect. Sometimes, amid the dense foliage, a serendipitous discovery would result in a whoop—a prettily patterned bitter gourd nestled there quietly, perfectly camouflaged by the leaves. The bitter gourd creepers were here to stay, and every month, they gifted us their abundance.

The pleasures of gardening are unparalleled. There is a farmers' market every Sunday in our town, where farmers from in and around Mangaluru come by to sell their home-grown produce. After experiencing the joy of growing our own produce at home, we now relate to them in a more personal way. It doesn't matter how large or small the vegetable is; the simple fact that it is home-grown and nurtured under watchful, loving care makes it taste more delicious and richer.

My father was in the judiciary, and we were transferred every three to five years. In every place we lived, he would begin work on a vegetable garden—beans, cauliflower, peas, tomatoes, bottle gourd, and much more. Our neighbours were always recipients of this fresh produce. "While books be your best companions, make plants your friends," he would tell me, a lesson that has endured.

The joys of sowing and reaping are unsurpassed; for what we sow, we reap. As parts of this circle of life, let the wheels of fortune spin gently, yielding the best of the harvest that is sown and, in doing so, making the world around us a better place to live.

LETTERS TO THE EDITOR

End of an era for the Left?

The election results in Kerala appear to signal the end of an era for the Left in India. After suffering decisive defeats in former bastions such as West Bengal and Tripura, where they were displaced by the Trinamool Congress and the Bharatiya Janata Party, respectively, Kerala remained the movement's last refuge, the last frontier. The loss of the Left is a watershed moment for the state, which made history in 1957 by electing Asia's first democratically elected Communist government. While this defeat suggests a national decline, it would be premature to write the Left off entirely, given the party's deeply entrenched organisational structure and strong grassroots cadre presence.
Adrian David, Chennai

Ball in US' court

Apropos 'Iran's new proposal seeks to end issues with US in 40 days' (May 4), Iran has done well to draw up a concrete and comprehensive proposal to end the war with the US and Israel. According to Iranian sources, the US' reply has already been filed with Pakistan, which is arbitrating between the warring nations. The US will have to adopt a give-and-take policy if it is serious about ending the war, which has already drained its exchequer of billions of dollars. It is also imperative that both Iran and the US realise that prolonging the conflict will not benefit either nation and will only take a heavy toll in terms of casualties, apart from causing serious infrastructural losses.
C V Aravind, Bengaluru

Beyond binaries

The current US–Iran narrative risks reducing a complex geopolitical issue to a false binary. History shows that durable peace rarely emerges from coercion or hurried agreements. Instead, it requires patience, mutual respect, and a willingness to address deeper regional concerns. A forward-looking approach should prioritise diplomatic innovation and inclusive dialogue, ensuring that decisions reflect not only national interests but also global stability and humanitarian responsibility.
Shahim Maindala, Mangaluru

Tackle e-waste crisis

Apropos 'Rising e-waste, weak recycling choking Karnataka' (May 3), the growing accumulation of e-waste is concerning, especially given the near-total lack of organised recycling. The authorities concerned must focus on finding a lasting solution to the problem. Responsibility for sustainable recycling should lie with the manufacturers, and it would be advisable for them to collaborate in establishing a collective system of reuse and recycling. The government, for its part, should facilitate the setting up of such units by offering suitable incentives.
A K Shariff, Mysuru

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

SPEAK OUT

In Bengal, a saffron wave has emerged. People hoped for change, but that the TMC would disappear in such a way was beyond our imagination.
Adhir Ranjan Chowdhury, Congress leader

The splinter in your eye is the best magnifying-glass available.
Theodor W Adorno

TO BE PRECISE

IN PERSPECTIVE

Privacy and the encryption dilemma

India needs a legal framework that efficiently balances rights with the legitimate requirements of law enforcement

HARSHITA GUPTA AND RAM M SUMANT

The internet today has become intertwined with human existence, especially in communication. Nonetheless, the human need to secure communication privacy and the foundational nature of privacy pose a challenge to governments globally: the conflict between privacy and law enforcement.

The recent order passed by the Karnataka High Court, staying the ban on Proton Mail service, is a case in point. Proton Mail is a Swiss privacy-focused, end-to-end encryption-based email service designed in 2014. In 2025, the court ordered a ban on the service, citing non-compliance with Section 69 of the Information Technology Act, 2000, and instances of hoax bomb threats and obscene messages being sent to schools and women.

The Proton Mail case raises a wider question about the need for an encryption law in India that reconciles fundamental rights and the needs of law enforcement agencies. Section 84A of the IT Act empowers the central government to issue standards for "modes or methods" of encryption. However, no standards exist yet. Additionally, in 2015, a draft policy on encryption was put forth; however, no substantive measures were taken. The said policy attempted to establish a regime where the State would prescribe encryption algorithms and key sizes. However, this ran the risk of putting all encryption within the easy reach of the government and thus raising concerns about free speech.

Currently, the power to intercept telecommunication stems from the Telecommunications Act, 2023, which grants wide powers to detain, reroute, and intercept communications to any officer designated by the central government. It is extended to electronic means of communication by the IT Act, including the obligation on data handlers to take "reasonable security measures." The Act enlists public order, prevention of incitement of a cognisable offence, and investigation of offences as grounds for de-encryption. The power to grant the request for such interceptions vests with the State or central secretaries of the Home Ministry, giving the ministry absolute power without a judicial officer on the review committee.

The IT Act thus stands as the major regulation in this regard and authorises only the executive authorities to access encrypted data. The Act also grants wide discretion to bureaucrats, without safeguards. Beyond this, it is pertinent to account for cross-border communication, undertaken using various platforms established outside India. As seen in the Proton Mail case, compliance with Indian law remains an issue. Even though mutual assistance treaties exist, they seldom prove to be useful, given the complexity and onerous obligations on the parties.

Risks cannot justify overreach

These lacunae in the law act as a hurdle in achieving the Supreme Court's mandate prescribed in *Shreya Singhal* and *Justice K S Puttaswamy*. In *Shreya Singhal*, the Court held that standards of freedom of speech and expression on the internet are not to be examined against a dissimilarly relaxed standard under Article 19(1)(a) but are to be exclusively limited to the criteria in Article 19(2).

In *Puttaswamy*, the Court prescribed a four-pronged test for laws limiting privacy rights. One of these tests used the phrase "necessary in a democratic society for a legitimate aim", which has been argued to emphasise the need to reconcile privacy and legitimate State aims. Thus, even in the context of national security and public order concerns, these requirements must be met.

Though the right to privacy has been recognised by the Supreme Court, the right to encryption has not been categorically mentioned. A statutory framework recognising the same with narrowly tailored restrictions, in consonance with *Puttaswamy*, should be the first step. Furthermore, clarity on the use of ethical hacking to access encrypted information must be provided through the IT Act. Experts have suggested adopting technical solutions such as user franking, metadata analysis using machine learning technologies, and homomorphic encryption to ensure both the privacy of individuals and the security of society.

Encryption is not a novel phenomenon; ancient societies have been known to use codes and have privacy preferences. This is necessary for a democratic society, as encrypted communication technologies, apart from serving the right to privacy, also act as a vital tool for journalists, whistle-blowers, etc. The potential for harm due to encryption, particularly in law enforcement, should not become an excuse for State surveillance and abuse by private miscreants. Therefore, a reasoned, proportional, principle-oriented, and constitutionally sound approach is needed now.

(Harshita and Ram are final-year and third-year law students, respectively, at National Law University, Jodhpur)

When proof becomes punishment and compliance erases compassion

D JEEVAN KUMAR

In a haunting image that has now travelled across the country, a 55-year-old tribal man from Keonjhar, Jitu Munda, walked into a branch of Odisha Grameen Bank carrying the skeletal remains of his deceased sister. His purpose was tragically simple: to prove that she was dead so that he could withdraw the modest sum of Rs 19,300 left in her account.

It is difficult to imagine a more disturbing indictment of our governance systems. This was not merely an act of desperation; it was a silent, searing protest against a bureaucracy that had ceased to recognise human reality unless it was stamped, certified, and documented.

At one level, the bank's insistence on proof of death may appear procedurally justified. Financial institutions must guard against fraud and ensure compliance with regulatory norms. Yet, governance is not merely about rules; it is equally about judgment, discretion, and empathy. When procedures are applied without sensitivity to context, they cease to be instruments of order and become instruments of exclusion.

The tragedy in Keonjhar exposes a deeper structural problem: the widening gap between document-based governance and lived social reality. For millions in rural and tribal India, access to formal documentation—birth certificates, death certificates, and identity proofs—is neither automatic nor timely. Civil registration systems remain uneven, particularly in remote areas. In such contexts, the absence of a document does not imply the absence of truth. Yet, our administrative systems often behave as though they do.

This is what scholars have described as the "documentary bias" of the modern state—a tendency to recognise only what is formally recorded, while ignoring what is socially evident. In this case, the burden of proof was placed entirely on a grieving brother, who was compelled to perform an act that strips dignity not only from the individual but also from the system itself.

There is an additional irony. Over the past decade, India has made significant strides in financial inclusion. Millions of previously unbanked citizens have been brought into the formal financial system. Accounts have been opened, subsidies transferred, and digital platforms expanded. But access to banking, as this incident reminds us, does not automatically translate into usability.

For the rural poor, especially those unfamiliar with bureaucratic procedures, the system often remains opaque and intimidating. The processes governing death claims, nominee verification, and account closure are complex even for the educated urban citizen. For a tribal family with limited literacy and minimal institutional exposure, these can be insurmountable. Inclusion, in such cases, risks becoming symbolic rather than substantive.

Equally troubling is the apparent absence of administrative convergence. A simple verification by local authorities—a village official, a panchayat secretary, or a health worker—could have resolved the issue without trauma. Instead, the system operated in silos, leaving the citizen to navigate an unforgiving maze.

The social context cannot be ignored. Tribal communities in India have historically experienced marginalisation, geographical isolation, and a deep mistrust of formal institutions. Language barriers, cultural differences, and the absence of intermediary support structures often widen the gap between citizen and state. In such circumstances, rigid adherence to procedure without contextual understanding is not neutrality—it is neglect.

Predictably, the aftermath followed a familiar script. Once the incident went viral, the administration moved swiftly. Documents were facilitated, funds released, and additional benefits extended to the individual. A high-level inquiry was ordered, and calls for sensitivity were issued. While these responses are welcome, they also underscore a troubling pattern in our governance culture: action is often reactive, triggered by outrage rather than guided by systemic foresight.

The real question, therefore, is not whether justice was eventually delivered in this case, but whether the system has learned anything from it.

If this incident is to serve any purpose beyond momentary shock, it must prompt structural reform. Procedures for small-value claims must be simplified, particularly for vulnerable populations. Local verification mechanisms—through gram panchayats or community institutions—should be formally recognised as valid proof in such cases. Banking personnel must be trained not only in compliance but also in human-centred service delivery. Most importantly, different arms of the state must be better integrated so that citizens are not forced to shuttle between disconnected authorities.

At a deeper level, this episode invites a moral reflection. Public institutions exist not merely to enforce rules but to serve people. The test of governance lies not in how efficiently it processes files, but in how compassionately it responds to the most vulnerable.

Mahatma Gandhi's well-known talisman urges decision-makers to recall the face of the poorest and weakest person and ask whether their action will restore dignity and control over life. By that measure, the system failed Jitu Munda long before he entered the bank with a skeleton in his hands.

In the end, the image that lingers is not of administrative correction but of human anguish. It forces us to confront an uncomfortable truth: when proof becomes punishment, governance loses its soul.

(The writer is an Hon Professor at Mahatma Gandhi Rural Development and Panchayat Raj University, Gadag, Karnataka)

A growing number of men across the continent say they are being promised jobs in Russia, only to be forced into the war

MATTHEW MPOKE BIGG, JOHN ELIGON AND ZIMASA MATIWANE

Kin of men who were missing after being recruited into Russia's military appealed to Kenya's Parliament for help in March. The authorities in at least nine countries have reported cases of men pushed into fighting for Russia under false pretenses. NYT

The 'death zone': How Russia is luring Africans to Ukraine

James Kamau Ndungu told only a few friends that he was heading to Russia. He told them he had been promised a job as a day labourer there. He was 32, unemployed in Kenya and needed the work. Last June, Kamau sent a photo to his friends from Istanbul Airport, saying he was in transit, one of the friends said. A few weeks later, he sent another photo. This time, he was wearing fatigues and holding a gun. In August, he wrote to say that he was in a trench in Ukraine. Things were bad. He asked for prayers.

It was the last anyone in Kenya heard from him.

A growing number of Africans are ending up on the front lines of Russia's war with Ukraine. Some go there willingly as mercenaries, but many more are like Kamau, young men lured by the promise of ordinary civilian jobs — from bodyguards to line cooks — only to be forced into joining Russian forces in battle.

A string of fly-by-night companies have been set up across the continent to recruit the men. The companies often appear as travel agencies or job placement firms and advertise on WhatsApp or Telegram.

The New York Times interviewed several victims and recruiters. The interviews suggest that the recruiters do not work directly with the defence ministry in Moscow. Contracts seen by the *Times* were in Russian, meaning the Africans could not read them.

Formal jobs in Africa are scarce, making the promise of work overseas a powerful magnet. And Africa has the fastest growing youth population on the planet. Many young people are unemployed, making the continent a prime target for the false recruitment of unwitting soldiers.

"Why has Russia taken my son?" Hannah Wambui Kamau wailed as she collapsed into the arms of relatives at Kamau's memorial on a muddy hillside outside Nairobi in March.

It is unclear how many men have been falsely recruited from Africa, though authorities in at least nine countries have reported cases. And in Kenya, the National Intelligence Service found that around 1,000 Kenyans had gone to Russia and ended up in Ukraine so far. Only 30 of them have returned alive. To curb the number of men being caught in the dragnet, the government said it had bolstered checks on young men leaving the country on international flights.

Okoiti Andrew Omtatah, a senator in Kenya, used a metaphor to describe the desperation created by the jobs crisis across Africa. "If a slave ship docked today in Mombasa with a banner saying, 'Slaves required in the West,'" he said, referring to the coastal city in Kenya, "you would not have space on that ship."

Russia's foreign minister, Sergey Lavrov, acknowledged in March that foreigners were participating in what Moscow calls its special military operation in Ukraine but said that the government does not hire or recruit people to fight against their will. "Volunteers get there in full compliance with Russian legislation," he said in Moscow at a news conference.

Asked whether any Africans had gone to Russia on the basis of a promise of civilian work only to find themselves pressed into military service, Kremlin spokesperson Dmitry Peskov told the *Times* last week through his press service, "We are unaware of any such cases."

Ukraine's ambassador to South Africa, Olexander Scherba, accused Russia of taking advantage of young Africans looking for work. "I'm just amazed at how devious and how inhumane and imperialist people can be towards Africans who just need money," he said.

Kenya, Tanzania, Zambia, South Africa, Nigeria, Ghana, Togo, Botswana and Mali have all reported men being falsely recruited into the Russian army. Prosecutors in Kenya charged a man in February with recruiting 22 Kenyans to Russia. The same month, South African President Cyril Ramaphosa spoke by telephone with Russian President Vladimir Putin about the recruitment of South Africans. A week later, 17 South Africans returned home from the front lines. Prosecutors are investigating a South African politician's involvement in misleading the men.

Vincent Odhiambo Awiti said he was recruited last year by an agent he met on the street in central Nairobi, Kenya's capital. The man told him he worked for the Global Faces Human Resources Agency and promised Awiti a job in a shop in Russia. He paid for him and four other men to fly to St Petersburg on July 14, Awiti said.

"We ended up buying the idea because I didn't have anything else to do," he said. "We thought that it was a great opportunity."

Awiti said he and the others were told to sign a contract to join the Russian military when they arrived. At first they refused, he said, but then he said they were told the only way to return to Kenya was to repay what had been spent to get them to Russia. None of the men had the money. They all signed the contract, he said.

The group was sent by train for four days of military training in a camp near the town of Shebekino, close to the front line south of Belgorod, Russia, Awiti said. He encountered an Egyptian recruit there who told him that he and the others were "dead men walking."

Awiti said he was sent into battle near the city of Vovchansk in Ukraine's Kharkiv province, the site of significant fighting last summer. His squad was instructed to cross two small rivers and a patch of open ground to get to a trench. His squad commander was killed before they reached the first river, he said.

"His head left his body," Awiti recalled. "They call it the death zone."

Awiti said he escaped with a Russian deserter who shot himself in the leg so he could be designated an invalid. He said he watched in horror as the Russian closed his eyes, aimed at the fleshy part of his lower leg and pulled the trigger twice.

Awiti said he was treated in Belgorod for wounds to his hand and hip from a drone attack and then shipped to a military hospital in Moscow. Doctors told him he would be sent back to the front once he recuperated, but he managed to get to the Kenyan Embassy and was put on a plane back to Nairobi. The embassy in Moscow did not reply to a request for comment.

Advertisements for Russian military service have flooded African social media over the past year, some promising monthly salaries of up to $3,000, lumpsum payments of $18,000 and even Russian citizenship after six months of service. Middlemen looking to cash in have turned these calls for Russian military service into business opportunities.

St Fortunes Travels and Logistics is a travel agency owned by Fortune Chimene Amaewhule, a Nigerian. Amaewhule said in an interview with the *Times* that he began to get requests last year from several African clients seeking help getting to Russia. They told him they heard there was money to be made with the Russian military, he said.

Last October, he posted an advertisement on Facebook: "Slots available for Drivers, Cooks, Logistic Workers & other positions to join the Russian military & get automatic citizenship with lots of benefits."

That same month, he posted a photo on Facebook of two people and wrote that they were Nigerians who had received $30,000 bonuses for joining Russia's military. "Don't forget recruitment is still ongoing," the post said.

A Nigerian friend who lived in Russia and had citizenship there was tasked with facilitating travel for the job seekers, Amaewhule said. But Amaewhule denied ever sending clients to Russia for military training and did not respond to questions about that post offering a $30,000 bonus.

The recruitment pipeline from Africa to Russia often appears to rely on personal connections like the one Amaewhule had with his friend in Russia.

The New York Times

Beyond quota, the missing feminine in Indian politics

J S SADANANDA JANEKERE

The recent failure of the Constitution (131st Amendment) Bill in the Lok Sabha—falling short of the mandatory two-thirds majority despite a high-stakes vote—has once again stalled the operationalisation of the Nari Shakti Vandan Adhiniyam. Coupled with the intense friction over the Delimitation Bill, 2026, and the ongoing census, the national discourse is trapped in a numbers game. India is debating seat counts, population-to-representative ratios, and regional balances, yet it ignores the more fundamental "nature" of the House these women are meant to enter.

The deadlock is often framed as a "deficiency" in political consensus or a logistical hurdle of delimitation. However, it is time to shift the burden of proof away from the supposed lack of women's "winnability" and toward the deficiency of the political sphere itself.

The current political environment is culturally "stunted", operating on a narrow, aggressive subset of human nature. By treating politics as a theatre of muscle and money power, we have created a structural barrier that marginalises not just biological women but any individual who prioritises the feminine principle of nurturance over the masculine impulse of dominance.

In India's current electoral culture, the "successful" candidate is often a euphemism for the "masculine" candidate. The entry requirements—handling violence, navigating opaque financial networks, and surviving hyper-aggressive rhetoric—act as a filter. This forces biological women into a Faustian bargain: to survive in the well of the House, they must adopt the very *paurusheya* (masculine) traits that the spirit of representation seeks to balance. When a woman is forced to function as a "political man" to win, numerical representation becomes a hollow victory.

Indian tradition offers a profound critique of this imbalance through the concept of *ardhanarishwara*. Here, *strittva* (femininity) and *purushatva* (masculinity) are not merely biological labels but essential qualities (*gunas*) required for a balanced human existence. A leader is one who, like Shiva, can balance the strength of transformation with the grace of sustenance.

It is telling that many of India's most progressive gender laws—from property rights to anti-dowry provisions—were initiated and passed by male-dominated parliaments. This suggests that the capacity to protect women's interests is not a biological monopoly but an ethical one. It proves that when the "feminine principle" of justice and care is activated within a legislator, representation happens naturally, regardless of their sex.

The "logical clincher" for our democracy is this: if we succeed in transforming the nature of politics from a game of dominance to a platform of Dharma (balance), the presence of women will no longer require the intervention of a "forced quota". A political culture hospitable to the Stritva principle—one that values consensus, communal well-being, and social harmony—will naturally draw women into its fold as biological entities.

The most compelling evidence for this argument lies in India's education sector. Over the last two decades, as we moved toward ensuring a transparent and secure environment for examinations, we witnessed a remarkable shift: girls began to consistently outnumber and outperform boys in merit lists across the country. This systemic triumph was not achieved through quotas but by creating a "level playing field" where academic merit was protected from the external pressures of physical intimidation or social dominance. When the environment was made hospitable to discipline and intellect—qualities inherent in both natures—the "biological entry" of women took care of itself.

Our goal must move beyond the narrow corridors of legislative mandates. We do not just need more laws; we need a cultural shift that de-masculinises the public sphere. The current impasse in Parliament should be seen as an opportunity not just to redraw our constituencies but also to redraw our political consciousness. Until the "nature" of Indian politics changes, changing the faces in the seats will serve no meaningful purpose. The true measure of our progress will not be a 33% quota but a politics where the feminine principle is finally given its rightful, equal half.

(The writer is a retired professor of political science, Kuvempu University)

OUR PAGES OF HISTORY

50 YEARS AGO: MAY 1976

Self-sufficiency, huge buffer stock aim of food policy

New Delhi, May 4

India is not only looking forward to achieving self-sufficiency in food-grains but also to building up a huge buffer stock, Minister of State for Agriculture Shah Nawaz Khan stated in the Lok Sabha today. Intervening in the debate on the Budget demands of the Ministry of Agriculture and Irrigation during which members generally pleaded for a better deal for the farmer, Mr. Khan assured the House that the farmers and the rural people, who constituted 80 per cent of the population, would get their due share.

25 YEARS AGO: MAY 2001

Ayodhya court drops trial against Advani, 20 others

Lucknow, May 4

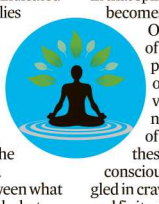
Concurring with the Allahabad High Court order on dropping of proceedings against Mr L K Advani and seven others, and widening the ambit of the charge of criminal conspiracy (crime number 198/92) to include 13 more accused, the special Ayodhya court today dropped the trial against 21 persons in the Babri Masjid demolition case. The ball in the politically sensitive case now lies in the State government's court, with the special judge ruling that cases against these persons can be revived through a fresh notification.

OASIS | NANDKISHORE

A life aligned with the infinite

The resolve to offer one's life in a spirit of voluntary service arises only when one understands that their presence is meant for the well-being of others. For the sake of interpersonal communication and personal remembrance/awareness, one may call it 'first-degree liberation'. This clarity is not merely intellectual—it is experiential. It matures when one recognises a profound truth: that the culmination of knowing is the recognition of the unknown—so deeply unknown that one is unaware even of what remains unknown. In this recognition, one becomes free from rigid belief.

Freedom from belief is not emptiness; it is openness and trust in oneness. It is a state of higher awareness that nourishes the body, mind, and inner being, because belief, when held unconsciously, can obstruct both learning and realisation. Across ages, sages have indicated that the essence of existence lies in self-realisation—abiding in self-awareness. At the present stage of evolution of consciousness in humans, living with awareness appears to be the most authentic expression of life's purpose for those who seek the supreme truth with sincerity.



There is a distinction between what we know we do not know and what lies beyond even our imagination. The former invites inquiry; the latter invites humility. This humility becomes the ground for inner growth. At this stage of awakening, openness becomes the greatest responsibility, and living in that spirit through one's person becomes the utmost discipline.

Once there is recognition of oneself as a responsible participant in the cosmic order, life aligns with eternal values—love, *dharma*, truth, nonviolence, and a vision of timeless beauty. When these values guide our actions, consciousness is no longer entangled in cravings for what is fleeting and finite. Instead, these values act as a living bridge between our true nature (*swa-bhaav*) and our apparent individuality, reflected through nature (*prakriti*). Our true nature is boundless and beyond time. And that which is infinite cannot be incomplete. When the intellect is refined and purified through right understanding, an inner freedom is experienced that is not dependent on external conditions. This is the state of living liberation—*Jeevan Mukta*. To abide in this state is true wisdom in action. Through such a being, something greater begins to express itself. Whether we call it 'divinity' or 'wisdom' is our choice, but it manifests as clarity, compassion, and harmony. And this lands us in subtle wonderment: whether there truly is a difference between divinity and wisdom, or are these simply two expressions pointing towards the same living truth.

The FT View

FINANCIAL TIMES
'Without fear and without favour'

ft.com/opinion

There is method in the market's madness

But it relies on a host of rosy assumptions going in investors' favour

The S&P 500 seems able to shake off just about anything. Since Donald Trump returned to the White House last year, it has weathered his tariff-raising agenda and attacks on the independence of the Federal Reserve. In recent weeks, it has erased losses sparked by the US-Israeli war with Iran, and climbed to record highs, with April marking its best month since 2020. That is despite continued disruption to shipping in the Strait of Hormuz — through which a fifth of the world's oil and liquefied natural gas usually flows — and little sign of progress towards a lasting peace deal. Last week, oil prices reached $126 a barrel, a four-year high.

On the surface, US stock prices look detached from the chaotic reality. But there is method in the market's apparent madness. First, valuations track corporate profits and these have remained robust. While some consumer and manufacturing companies are being hit by higher energy costs, resilience in earnings elsewhere is providing an uplift for the S&P 500 overall. For instance, trading revenues at Wall Street's largest banks have been boosted by market volatility, and energy stocks climb higher with the price of oil. Above all, strong earnings results and forecasts among chipmakers and hyperscalers in the first quarter have reinforced optimism around AI. With IT comprising around one-third of market capitalisation, the sector's performance has propelled the S&P 500 higher.

Next, it is difficult for investors to put a price on the uncertainty. Trump has been providing regular updates about ceasefire negotiations via social media, but his posts have often been vague and contradictory — perhaps by design. Though some may attempt to trade on the daily movements, for many it has been easier to look through the noise, and avoid selling funds in S&P 500 trackers, until clearer signals emerge. Likewise, last week's meetings of the major central banks, including the Fed, European Central Bank and Bank of England, not unreasonably, kept interest rates on hold as they monitor the economic impact of the war. Their wait-and-see approach has provided further buoyancy to stocks.

Investors have also tended to downplay the worst-case scenario of a prolonged closure of the strait. That is partly because they believe there is a limit to how much economic pain the White House will tolerate. Trump has form here. As bond and equity prices plunged following his "liberation day" announcements in April 2025, he diluted his tariff measures. Likewise during the Iran war, the commander-in-chief has often rowed back on his most aggressive rhetoric following adverse market movements.

> Strong earnings results and forecasts among chipmakers and hyperscalers in the first quarter have reinforced optimism around AI

Yet while the market's resilience may be logical, it rests on a fragile stack of assumptions. For one, lofty AI-related earnings forecasts could yet unravel. And, unlike his tariff policies, it is proving far harder for Trump to reverse the effects of the Iran war.

The longer trade through the strait is hindered, the deeper the economic and market fallout risks becoming. The Fed — and other central banks — could be forced into rate increases. Though Trump's nomination to chair the central bank, Kevin Warsh, is set to be confirmed soon, last Wednesday's meeting of the Fed's Open Market Committee underscored rising concerns around inflation. Rising energy prices and fissures in the global chip supply chain could also dent the euphoria around AI.

For now, the rosier narrative is proving more compelling. But with high levels of market concentration and a record share of US households' financial assets in equities, the costs would be swift and unforgiving if optimism gives way to a gloomier reality.

Opinion Geopolitics

Trump's deference to Beijing comes at a cost

Andrew Harrer/Bloomberg

Ely Ratner

Amid an otherwise chaotic foreign policy, the Trump administration has settled on a surprisingly coherent approach towards China — one premised on deference, aimed at buying time and built on the conviction that accommodation will earn goodwill. That doctrine is now setting the stage for President Donald Trump's visit to Beijing in May. But it is as misguided as it is dangerous.

There is an alluring logic to hitting pause until the US is strong enough to prevail. Now that Beijing has demonstrated its leverage on critical minerals, the US needs time to bolster its supply chains and supercharge its industrial base. But the Trump administration is repeating a familiar mistake in betting that backing off will produce reciprocal restraint. This approach has failed repeatedly.

When the Obama administration declined to challenge China's island-building in the South China Sea, artificial reefs became military installations. When the US absorbed years of state-sponsored cyber theft and responded with little more than quiet diplomacy and symbolic sanctions, accommodation only validated China's behaviour. When Trump, in his first term, paused tariffs in exchange for a phase one trade deal, China pocketed the relief, missed its purchase commitments, and deferred structural reforms to a phase two that never came. And when Washington and the world soft-pedalled demands for an investigation into Covid's origins, Beijing stonewalled and the window for accountability closed.

> Tariffs on allies are corroding relationships essential to any serious strategy towards China

The Trump administration's new China strategy ignores that history. And, in a bid to placate Beijing, the concessions are piling up. The administration has curtailed support for Taiwan, loosened technology controls, and scaled back investigations of China-linked cyber attacks.

Predictably, this policy of accommodation has emboldened Beijing. China's leaders are growing more confident, drawing conclusions about Washington's waning will to defend its interests or stand with its partners. When Trump rolled back his tariffs in the face of China's new export controls, Beijing responded by hitting the accelerator and introducing stricter measures. This regulatory grip has been further tightened with new rules that give Chinese authorities wide discretion over foreign companies.

The regional consequences are equally grave. Countries in south-east Asia are wondering why the US is no longer openly challenging China's illegal claims in the South China Sea. Longstanding partners are trying to discern why Washington failed to back Tokyo during its most recent stand-off with Beijing. In capital after capital, the question being asked is not whether China is a threat, but whether the US will show up.

In response, governments are considering reorienting their approach to China. If Washington is unwilling to push back against Beijing, then Canberra, Manila, New Delhi and Seoul — not to mention Berlin, London and Paris — will have little reason to absorb the costs of a harder line. No surprise then that allies are beginning to hedge, following Washington's lead. This threatens to reverse years of hard-fought efforts to build the very coalitions required to deter Chinese aggression and coercion.

Perhaps most tragically, the Trump administration is not actually using the time it is buying to strengthen the US. The war in Iran has drained inventories, disrupted maintenance cycles, and made the US military less ready for a crisis in the Pacific. Tariffs on allies are corroding the relationships essential to any serious economic strategy towards China. Europe is being pushed away precisely when alignment matters most. Talent is flowing out of the US and government investment in research and development is being cut. A strategy of consolidation is defensible as a temporary measure — if paired with genuine self-strengthening. Unfortunately, that is not happening.

The May summit could produce lofty pronouncements. Trump may walk away with pledges for Chinese purchases of soyabeans and aeroplanes or a new body to manage the trade relationship. Those are not the concern. The real problem is what Trump's visit might ratify. If it locks in a posture of strategic deference as the operating logic of America's China policy, the costs will mount. Beijing will conclude that it can coerce and negotiate what it wants out of Washington. Allies will decide that US commitments cannot be trusted. And the US will discover, when it eventually decides to compete in earnest, that it has less leverage, fewer partners and wider gaps to close.

Washington needs to stop mistaking accommodation for sound strategy.

The writer served as US assistant secretary of defence for Indo-Pacific security affairs from 2021-25

Letters

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Germans accept France's 'force de frappe' as security backstop

Your Big Read "Germany re-arms: what does it mean for Europe?" (April 29) helpfully deflates the alarmist claims about the risk of Germany sleepwalking into a hegemonic position.

In an essay for the Frankfurter Allgemeine Zeitung, I argue that Germany finally is coming to terms with power being the hardest currency in international politics. Surely, German foreign policy must always take into account the fact that history doesn't fade away, and that even a partly supranationalised EU does not nullify the power differentials between individual member states.

Indeed, in terms of demographic and economic-technological resources, Germany surpasses all its European neighbours, while its military capabilities lag behind France and the UK. However, this is set to change.

The ongoing rearmament programme aims to make Germany's army the strongest in Europe. Yet it will still have to rely on others for its nuclear protection. And even if Germany had an independent nuclear deterrent it would not upset the balance of power in Europe. First, its resources are not superior enough to those of its neighbours. Second, Germany can only hold its own against major powers such as the US and China through a collective European security. Its economic power base is the EU single market, and it can only protect itself against Russia by collaborating with others. Third, Germany is integrated into Nato and the EU, two organisations where members transfer over a significant portion of their sovereignty. History does not repeat itself in this case, and it doesn't even rhyme, but people and states do learn from history.

At long last, Germany has accepted Emmanuel Macron's offer to explore and develop the capacity of France's independent nuclear *force de frappe* to be a backstop for German security. In effect, this amounts to what I call a "Nuclear Aachen" as it builds on article 4 of the 2019 Franco-German Aachen Treaty and Germany's privileged position as France's "key and indispensable partner" (Macron's words, in his speech on nuclear deterrence on March 2 2026). Ideally, such a Franco-German bilateral arrangement would serve as a catalyst for a joint Franco-British nuclear umbrella for all European partners.

Eckhard Lübkemeier
Ambassador (ret), and Visiting Fellow, German Institute for International and Security Affairs, Berlin, Germany

The test for Europe's new merger rules

Teresa Ribera, EU competition commissioner, tells the FT she wants merger rules to take into account the scale, innovation and sustainability of European players when approving or rejecting deals (Interview, April 18).

Great. In the digital economy, growing domestic companies is an existential priority for Europe. However, new merger rules will deliver only if they make progress on three fundamental issues.

First, revamped rules must favour European investment over foreign extraction. Often, transactions by foreign technology groups follow a pattern: buy European assets only to relocate them closer to their home base, in effect hollowing out the continent's innovation potential.

If US companies want to keep shopping in Europe for talent — remember Microsoft/Skype or Facebook/WhatsApp — their deals should be conditional on maintaining a tech footprint in Europe. We cannot afford to be leading in basic science and engineering while others reap the industrial rewards.

Second, the commission must limit the "break-up culture" that keeps companies small. In practice, merging groups are often asked to go through a sacrificial rite — cutting off a business division or an R&D lab to pass review. A greater openness to "behavioural commitments" — such as guaranteed investments in infrastructure or R&D — would make merger law much more sensible and less brutal. A glimpse of this new mindset was visible in 2024, when the UK regulator allowed the merger between Vodafone and Three on the condition that they invest billions to roll out a combined 5G network.

One last thing: the commission should not hide minimal reform behind legal constraints. Merger agencies have traditionally invoked a "justice" argument to refuse to consider the positive benefits of mergers. Currently, if a merger raises prices in Luxembourg but generates larger benefits in Croatia, agencies tend to block it. They do not like to favour one consumer over another. This strict distributional logic was applied to block the merger between UPS and TNT in 2013.

This argument breaks down when innovation is in question. Because innovation gains accrue to a wide set of consumers, they should be deemed to raise prosperity for all.

Moreover, even if the probability of innovation is low, the potential gains are so large that we should take the chance.

Professor Nicolas Petit
Head of Law Department, European University Institute, Florence, Italy

Beryl Cook is a favourite for visitors to galleries in the English regions — Alamy

US overstates threat posed by EU methane regulation

The views of your guest columnist Andrew Puzder, the US ambassador to the European Union, on the implementation of the EU methane regulation ("EU's methane regulation could spark an energy crisis", Opinion, April 28) echo industry lobbying to "stop the clock", which look more like a suggestion to "throw away the clock".

Claims that the regulation is so far-reaching that it threatens EU energy security, competitiveness and its role in the AI economy seem somewhat overstated.

While the current Strait of Hormuz crisis is ongoing, the suggestion that either Brussels or EU member states would put their energy security at risk by refusing to import, or by imposing punitive penalties on, liquefied natural gas (or oil) imports seems similarly overstated. The ambassador's assertion that "American LNG on average is among the lowest methane-intensity fuels available on the global market", if true, suggests the US has little to worry about from the regulation.

In the longer term, companies which have invested in LNG export facilities with asset lives of several decades should reflect that a fifth of European gas demand has already been lost since 2021, and current elevated prices levels suggest a continuation of this trend.

When the current oil and gas crisis passes, and attention returns to the impact of climate change, attempts to overturn a regulation aimed at allowing importers (and their customers) enough information to choose between sources of imported fossil fuels on the basis of their methane content may create further problems for the image of these industries in Europe.

Professor Jonathan Stern
Distinguished Research Fellow, Oxford Institute for Energy Studies, Oxford, UK

Use English law and the City to relieve Africa's debt

Private sector investment is increasingly being presented as a cure-all for global development, particularly as the G7 group of leading economies cuts international aid ("People in G7 overestimate foreign aid outlay", Report, April 23; and "The Iran war shock for developing nations", The FT View, April 27).

This ignores the reality facing 54 countries in the developing world already in debt distress, where governments are cutting essential public services to repay international creditors.

The Iran war threatens to increase this and risks pushing millions more people into poverty.

Unlike previous debt crises, a growing share of these obligations is now held by commercial banks and investment companies that are refusing to restructure or offer debt relief. Given this, it is striking that debt relief is not central to the Global Partnerships Conference the UK is convening on May 19-20 in London — an event that brings together many of the same private investors whose refusal to restructure debt is deepening hardship across low-income countries.

Christian Aid believes there is a better path. Because many of these loans are governed by English law and transacted through the City of London, the UK government could introduce legislation compelling private creditors to participate in global debt restructuring.

This would require no public expenditure, only political will — and it could help release much needed development finance for low-income countries and avert a development disaster on a vast scale.

Jennifer Larbie
UK Influencing Lead, Christian Aid, London SE1, UK

It's a 'moral obligation' to help younger generation

It was uplifting to read Isabel Woodford's article (FT Money, April 25) about how young adults are responding to the current financial climate. What was less encouraging was how some parents and presumably grandparents are not responding,

I am well into retirement. I had the huge advantage of a free university education and then with my fees for law school also paid by the state. For this reason I consider there is a moral obligation on those of my generation who went to university to help the younger generations as much as possible. Few in retirement should be accumulating any surplus income. A monthly standing order to parents/grandchildren to fund equity Isa/Junior Isa saving is a simple step that can have immense benefit. Our 16-year-old grandson chose to list his Jisa investments on his smartphone. This can also be part of a long-term IHT reduction strategy.

On a separate subject, please would you ask Stuart Kirk to invite Baroness Altmann to lunch with the FT. Kirk can then write in more detail on the perils of private assets being requisitioned to fund state investment objectives.

Peter Nellist
Exeter, Devon, UK
The FT's financial literacy charity FLIC provides free educational material for young people and adults alike.

How London galleries were better in the Victorian era

I wish Mariana Mazzucato well in her new job as economist-in-residence at the Whitechapel Gallery, but she will need to think outside the national galleries' box (Report, April 29).

In the Victorian era, galleries were full of visitors from all classes. Today, according to the V&A annual report, less than 8 per cent are from the working classes. The Victorian curators hung pictures that the critics loathed but the public loved. Today the reverse is the case. Few of the major galleries in London show such artists as Jack Vettriano, Banksy or Beryl Cook yet when they are displayed in regional galleries they sell out.

I am not recommending that these galleries stop showing abstract or conceptual art, but that they also show artists that the public love.

Galleries have become an echo chamber of the middle classes. If they continue to ignore the working classes, it will be no surprise if MPs, who hear the needs of their constituents every weekend, put galleries low on their list of priorities.

David Kennedy
Author of 'Art & Class: How the Middle Classes Hijacked the Nation's Galleries', Ilkley, West Yorkshire, UK

Opinion

How the US's retail army came to rule the stock market

MARKETS

Ruchir Sharma

Wall Street pros used to dismiss retail investors as "dumb money" — amateurs who knew no better than to chase the latest hot trade. But lately, the little guys have made impressive gains by "buying the dip", and have arguably emerged as the single most influential set of investors in the stock market. Awed by the way the retail crowd just buys its way through negative headlines, some pros have stopped sneering and started to follow their lead.

The share of US households that own stocks has surged this decade to nearly 60 per cent, the highest proportion in any country. Americans are all in on the market, holding more wealth in stocks than in their homes for the first time. And retail is now the most active class of traders as well.

Retail's share of daily trading in US stocks doubled in the past 15 years to 36 per cent, surpassing that of big banks or hedge funds, and making them the market price-setters. Last year US retail trading topped $5tn, exceeding the pandemic high, only this time Americans weren't stuck at home or flush with savings. They were chasing returns and the shock of the Iran war has barely slowed them down. So far in 2026 they have remained net buyers on most days.

Three forces are encouraging small investors' deep faith in the stock market: stimulus, bailouts and technology. Record sums of money pouring out of government and central banks, intended to lift the fortunes of the real economy, have instead been used by households (particularly richer ones) to invest in the stock market. With policymakers rushing to rescue the economy at the slightest hint of trouble, investors have come to believe the government will always bail them out. And low-cost, mobile trading platforms have given everyone easy access to investments.

It's not that the nature of retail investors has changed completely. They still skew increasingly young, male and overeager. They chase returns when markets are rising fast and are classic "momentum" investors. So their habits have found fertile ground in the momentum bull run; it is one of the longest ever, over 15 years and counting, with only brief pauses for shocks such as the pandemic and the tariff drama last April.

> Awed by how they just buy their way through negative headlines, some pros have started to follow their lead

In the past, the more retail investors traded, the more they lost. The pros watched the amateurs only to see which way they were going so they could bet the opposite way. Not any more. Nearly a third of the stocks held by retail are also held by "aggressive" institutions like hedge funds and growth-focused mutual funds — a record overlap. Lately, some institutions have even begun offering mutual funds that track stocks favoured by the retail class.

According to Empirical Research Partners, retail investors have "trounced the professionals" by going double overweight on the "most controversial" momentum plays including, for example, those that have seen "supernova" price rises. Their favourites include precious metals and above all AI. Last year, retail investors beat the S&P 500 by a solid 10 percentage points.

Tech platforms and products favoured by retail investors, such as exchange traded funds, are growing explosively to meet demand. ETFs now outnumber publicly traded stocks in the US (5,000 to around 4,000) and more than half launched in just the last three years. Many of the newer ETFs are offering amateurs first-time access to risky options once reserved for pros, such as leveraged bets on single stocks. Over the past decade, the assets managed by leveraged ETFs rose sevenfold to $140bn.

These trends are making the market more democratic, in the sense that it is more accessible, but not necessarily more equitable. The typical newbie owns few shares and moves tiny sums of money. The richest 1 per cent own more than 50 per cent of US stocks and gain most when the market goes up. But the larger the retail community gets, the more pressure builds on politicians to support the market. What was said of Wall Street banks after the crisis of 2008 can now be said of the stock market as a whole: it's "too big to fail".

Still, markets cannot keep going up forever. The mania for AI-led momentum stocks will cool some day. An inflationary shock or the challenge of mounting government debts could eventually slow or reverse the endless flow of liquidity, and even restrain the next bailout. When that happens, it will shake the confidence of the retail crowd and turn these confident buyers into aggressive sellers. Until then, this army will keep marching on, undeterred by shocks and emboldened by their recent record.

The writer is chair of Rockefeller International. His latest book is 'What Went Wrong With Capitalism'

America's new identity crisis

Mark Kenyon

SOCIETY

Rana Foroohar

Yet another part of Donald Trump's coalition — the Make America Healthy Again movement — is splintering. Chemical-fearing, organic food-loving Maha activists descended on Washington recently to protest against the Trump administration's support for glyphosate, the weedkiller packaged as Monsanto's Roundup. The product is the subject of a big liability case.

Bayer, Monsanto's parent company, denies that Roundup causes cancer. But "Maha moms" are sceptical (like many others), as evidenced by their cries of "people versus poison" outside the Supreme Court last week.

It is noteworthy that the highest-profile speaker at the event was not vaccine-eschewing health secretary Robert F Kennedy Jr, but agribusiness sceptic Cory Booker, a Democratic US senator. For Maha moms, many of whom are as dubious of large corporate interests as any progressive Democrat, family health is more important than party loyalty. The protest also points to the way that Trump's base is pulling away from him, as part of a larger realignment that could reshape partisan politics in America.

Trump came into his second term promising a richer America (off the back of a manufacturing boom), a healthier America (see Maha), a more devout America (he won evangelical and a majority of Catholic voters), cheaper prices and no more foreign wars. So far, so bad. Not only are manufacturing jobs down and inflation up (thanks most recently to Trump's war of choice in Iran), but the president has managed to offend the faithful by warring with the pope and posting pictures depicting himself as Jesus. "We don't completely know where he is in his heart," said Bunni Pounds, the organiser of a national Bible reading event last week, about the US President. Preach, sister.

Pre-midterm polls show declining support among faith voters and working people, indicating that many in the Maga base now see Trump for what he is: a rich charlatan, who is cosy with the companies moving their jobs abroad or polluting their water, and seems ready to send them to fight foreign wars. This is fact, not fiction. Maga Inc, the political fundraising group, or Super Pac, that supports Trump, gets most of its money from Big Tech, finance, defence and energy companies. That's anathema to the populist wing of the Republican Party.

But it's not only the base that's feeling alienated. There are any number of issues where conservative voters differ from the president. While true conservatives support states' rights, this administration has tried to prevent states from passing their own AI regulation rules. Trump has also done an about-face on privacy, something libertarian Republicans care a lot about, pushing for the renewal of the Foreign Intelligence Surveillance Act (Fisa) that allows US intelligence agencies to query digital information about Americans without a warrant. Previously, he'd been against it.

It is telling that the Fisa reauthorisation fight, which is going on right now, involves a right/left coalition that has been with us since the rise of both Trump and veteran leftwing senator Bernie Sanders. Both appealed to voters who rejected conventional centrist wisdom on concentrated economic power, vested interests, free trade, government corruption and globalisation.

Members of the House Freedom Caucus, the most conservative wing of the Republican Party, want to close the "section 702" loophole that allows for "backdoor searches" of US citizens' communications, as do economic populists and tech sceptics, including Republican senator Josh Hawley. That idea is also supported by progressives like Ron Wyden, Elizabeth Warren and of course Sanders. Meanwhile, many centrists on both sides support a "clean" reauthorisation of the bill in its current form, citing the usual issues like terror prevention and national security.

> The outer edges of both parties are overlapping on a growing number of issues

On this, as with an increasing number of issues, the outer edges of the parties are overlapping with each other. Witness conservative Indiana politicians who treasure states' rights pushing back on White House gerrymandering. Or progressives like Democratic senator Chris Murphy speaking about spiritual issues, Then there is Maine oyster farmer, veteran and Democratic Senate candidate Graham Platner, who advocates for a less interventionist foreign policy than liberals supported in the past. These are all areas where issues are taking precedence over party allegiances.

This sort of realignment isn't unprecedented. In the 1850s, anti-establishment populism led to the collapse of the Whig Party, which split over slavery, and the rise of the Republican Party. But transformation across partisan lines can also occur without disrupting the entire party structure. In the 1930s Franklin D Roosevelt used a power vs people narrative to bring Democrats, Republicans and labour activists into the New Deal coalition.

I'm not yet betting on a collapse of either party. But it is clear we are in another period of great political churn and change. I suspect that populists at both ends of the spectrum will attract more support in the midterms and very probably in the 2028 presidential election too. Party lines will continue to blend and shift, with the ultimate result perhaps being a centrist/pro-business candidate on one side, and an economic populist on the other. The big question is which party they would represent.

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Trouble for Labour across a scrambled political map

Lewis Baston

Pluralism and political competition have their merits, but multi-party fights under Britain's first-past-the-post electoral system produce chaotic results. And fragmentation of the party system has led to a scrambled political map.

On Thursday, there will be elections for the Scottish parliament, the Welsh Senedd and 136 local authorities across England. The Starmer government's unpopularity overshadows everything; Labour is heading for a historically bad result with few consoling local details. But the elections will also reveal deeper currents in British politics.

Labour's troubles are part of a wave of anti-incumbency. In Scotland, even though the Scottish National Party's status as largest party is not in doubt, 19 years of governing have had their costs — the SNP's projected share of the regional list part of the electoral system is way down. As in 2021, it will win most constituency seats because of fragmented opposition. Labour had hoped to displace the SNP from government, but this dream faded partly because the rise of Reform makes forming a unionist government much more difficult.

The cruellest cut will come in Wales. Labour has been the leading party in every general and Senedd election since 1922, a run of success rivalled by very few parties in the democratic world. It has run the Welsh government alone or in coalition since its foundation in 1999. Plaid Cymru's English-language name is The Party of Wales, but the Welsh Labour Party has always felt, with some reason, that the title belongs to them.

No longer. Labour is likely to come a poor third behind Plaid and Reform, with the nationalists forming a government. Welsh politics and national life will never be the same again once Labour is displaced, just as 2007, when power switched from Labour to the SNP at Holyrood, was a turning point for Scotland.

As for the local elections across England, these used to have a comforting regularity. The pendulum would swing, marginal boroughs and towns would go to the main opposition party and as a Conservative or Labour government got stale it would lose previous strongholds. Things started to get more complex with the rise of the Liberal Democrats, but as an analyst you knew where you stood.

Now, one has to talk about "the five big parties"— Conservative, Labour, Reform, Lib Dem and the newly insurgent Greens — both in terms of popular support and the ability to stand candidates across the country. In some places, independents are channelling discontent with Labour's line on Gaza — some supported by Jeremy Corbyn's Your Party. In Barking and Dagenham, the number of candidates for the borough's 51 seats has gone up from 91 at the last elections to 215 this time round.

> The extent to which the party is under siege is testament to the breadth of its past electoral coalition

Because of this splintering, a party can win big local majorities on low vote share, as Reform did last year in county councils and Labour in the general election. While in some places all the parties are relevant, the more usual pattern is kaleidoscopic, with competition between different combinations in different areas usually based on demographics rather than local issues. London is sharply distinguished from the rest of England in Reform's relative weakness, but even among its 32 boroughs there are at least eight combinations of leading parties battling it out.

Last year the Conservatives were flattened by a wave of Reform support in the English regions. This year's contests are mostly urban; over a third are for the London boroughs. Most were last fought in 2022, a good year for Labour. Reform is fortunate, and Labour very unlucky, in where all the seats are up: the North East, Yorkshire and the West Midlands. This means Sunderland and Barnsley — continuously Labour since the current authorities were established in 1974 — and others could flip overnight to large Reform majorities.

Labour has not previously faced much competition from the left, but the Greens and independents have been advancing steadily in areas with metropolitan liberal and Muslim voters: university cities like Norwich, Oxford and Newcastle, and inner London. For the troubled world of English local government, the consequences may be far-reaching: inexperienced councillors with radical intentions and weak leadership and a significant number of councils with no overall control and no obvious coalition.

The extent to which Labour is under siege is testament to the breadth of its past electoral coalition, which stretched from the Welsh valleys and industrial towns to cosmopolitan cities and two-thirds of London boroughs. But the problem with winning so broadly is that, as the electorate fragments, it does not take much to flip and lose everything.

The writer is a psephologist. His latest book is 'Borderlines'

Lebanon needs help to secure its economic recovery

Karim Souaid

Lebanon's economic crisis is often described as complex. It is not. It is the predictable result of fiscal indiscipline by dilettante governments, monetary mismanagement by the central bank and the concentrated misallocation of private savings by the banking sector.

Recent policy adjustments by the government are moving the country in the right direction. Fiscal balances have improved, largely through higher tax collection and constrained spending. This is key, but not enough to resolve all impediments towards recovery.

The central bank's proposed banking restructuring framework acknowledges an essential truth: losses must be allocated between principal stakeholders — the state, the central bank and the commercial banks — before a turnaround can take shape. The prioritisation of smaller depositors — almost 90 per cent of accounts — is both economically rational and socially necessary.

A banking system cannot be rebuilt on impaired assets and inadequate capital. It must be recapitalised with fresh equity or seriously downsized, to reflect economic reality. Anything in between merely prolongs stagnation. It is not surprising that a large share of economic activity has migrated to cash. When confidence in institutions declines, people revert to instruments they control directly. But a cash-based economy weakens tax collection, damages growth and facilitates illicit financial activity. Reversing this trend requires restoring trust in the formal banking system.

> When confidence in institutions declines, people revert to instruments they control directly

The central bank is supporting criminal and civil actions, at home and abroad, against former officials and banking principals implicated in systemic, sophisticated fraud. The objective is to reclaim misappropriated money and uphold the rights of depositors whose funds have long borne the cost of such abuses.

Lebanon's potential is not speculative. Its role as a regional hub for services — education, healthcare, finance — and trade is well documented. The question is not whether that role can be restored, but whether the conditions for its return will be allowed to re-emerge. There is still one factor that no economic model can easily absorb: armed conflict. War brings uncertainty that deters investment, accelerates capital flight and erodes gains from policy reforms. Under such conditions, even sound economic measures yield diminished returns.

The central bank's priorities — preserving our currency, maintaining basic state functions and providing phased repayments to depositors — are appropriate. But they operate within tight constraints. Without external support, adjustment will proceed, but more slowly and at greater social cost. The IMF is deeply engaged with the government in negotiations that aim towards a constructive resolution plan — arguably the last credible pathway to anchor reforms and a sustainable recovery. Lebanon has little room to impose any counter-conditions so the chance of an accord is rather positive.

International actors have provided sound advice in abundance. Friends and neighbours have offered support, in principle. However, financial support has been more limited. This reflects a familiar hesitation: a preference for policy correction before capital commitment. Yet stabilisation often requires both to proceed. Without a bridge, even well-designed reforms risk exhaustion before they take hold.

The choice facing the international community is clear: support a reform-driven government now or defer assistance and risk a far more destabilised reality, after conflict has taken its toll and without the assurance of the institutional capacity needed to implement it.

Economic outcomes are not determined by intentions. They are determined by constraints. Lebanon has reached the point where those constraints can no longer be ignored.

The writer is governor of the central bank of Lebanon

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(من اقوال العرب)

YOUR DAILY ARABIC PROVERB
Losing the ability to be patient is the worst affliction.
An Arab maxim

Opinion

The long game of film

SALEM BRAHIMI

For all the glitz and glamor that will descend upon Cannes in a few days, the world's most respected film festival is also a battleground. It was created in 1939 to stand against the fascist influence that had taken over the Venice Film Festival. Since then, it has been a place where art turns into soft power and where different ideologies compete not only for a Palme d'Or but for the world's hearts and minds.

The two opposing forces that have been pitted against each other in Cannes over recent years are cinema and social media. In other words: duration versus the instant. On one side, films that take years to make and demand two hours of undivided attention. On the other, the instant: red-carpet selfies that go viral in seconds and are forgotten in minutes. This embodies the tension at the heart of the most powerful cultural tool any nation could possess: the moving image.

This tension is particularly relevant to the Arab world today. Our region lives at the center of the world's most consequential fault lines. We, of all people, know that getting the story right is existential. Recent history has shown us that when the instant dominates the narrative, the first casualty is truth. As we navigate the turbulent world around us, telling our own story is not a luxury. It is a strategic imperative and a sovereign resource.

Choosing the instant over duration is the response that would seem the most obvious. Social media is, after all, powerful, fast and cheap. Moreover, the population of the Arab world is young and passionately engaged with social media. To add another nail to film's coffin, one could also look at the rise of 90-second micro-dramas in the Middle East and North Africa region. Isn't the $7 billion economy that micro-dramas created in China reason enough to throw film under the TikTok bus?

Not quite.

If one steps back, the big picture tells a different story: China's theatrical box office takings surged 22 percent the same year that micro-drama exploded. The vertical screen and the silver screen grew together.

New media is not the enemy.

The appetite for cinema in the Arab world is evident. Egypt, the Maghreb and the Levant all have a well-storied love for film. More recently, the Saudi box office rose from nonexistence in 2018 to regional heavyweight — 42 percent of MENA box office revenues — in eight years. Regional streamer Shahid is outpacing global giants in the region. Does this mean that the battle for Arab cinema is won?

Salem Brahimi is a French-Algerian filmmaker, screenwriter and producer. Born in London, his films, including "Let Them Come" and "Abd-El-Kader," bring Arab stories to international audiences. A voting member of the Academy of Motion Picture Arts and Sciences, he advises cultural and media leaders and their organizations across Europe and the Middle East.

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Not quite.

For all the world-class talent we have in the Arab world, the success stories are still outliers. They need to become systemic. For all the infrastructure we have built, it is only hardware, still awaiting its software: operating systems that nurture talent, diversity and dependable funding models.

Time is a critical factor here. And so, we go full circle: duration versus the instant.

Most countries in the region are rightly prioritizing national resilience and defense. Film is not a distraction from these pursuits. It is a powerful vehicle for them. Hard power must be seconded with soft power. But soft power cannot be declared. It must be earned. Every venture capital firm in Silicon Valley knows you must invest in 10 startups to get one winner. The same goes for soft power and its flagship: film.

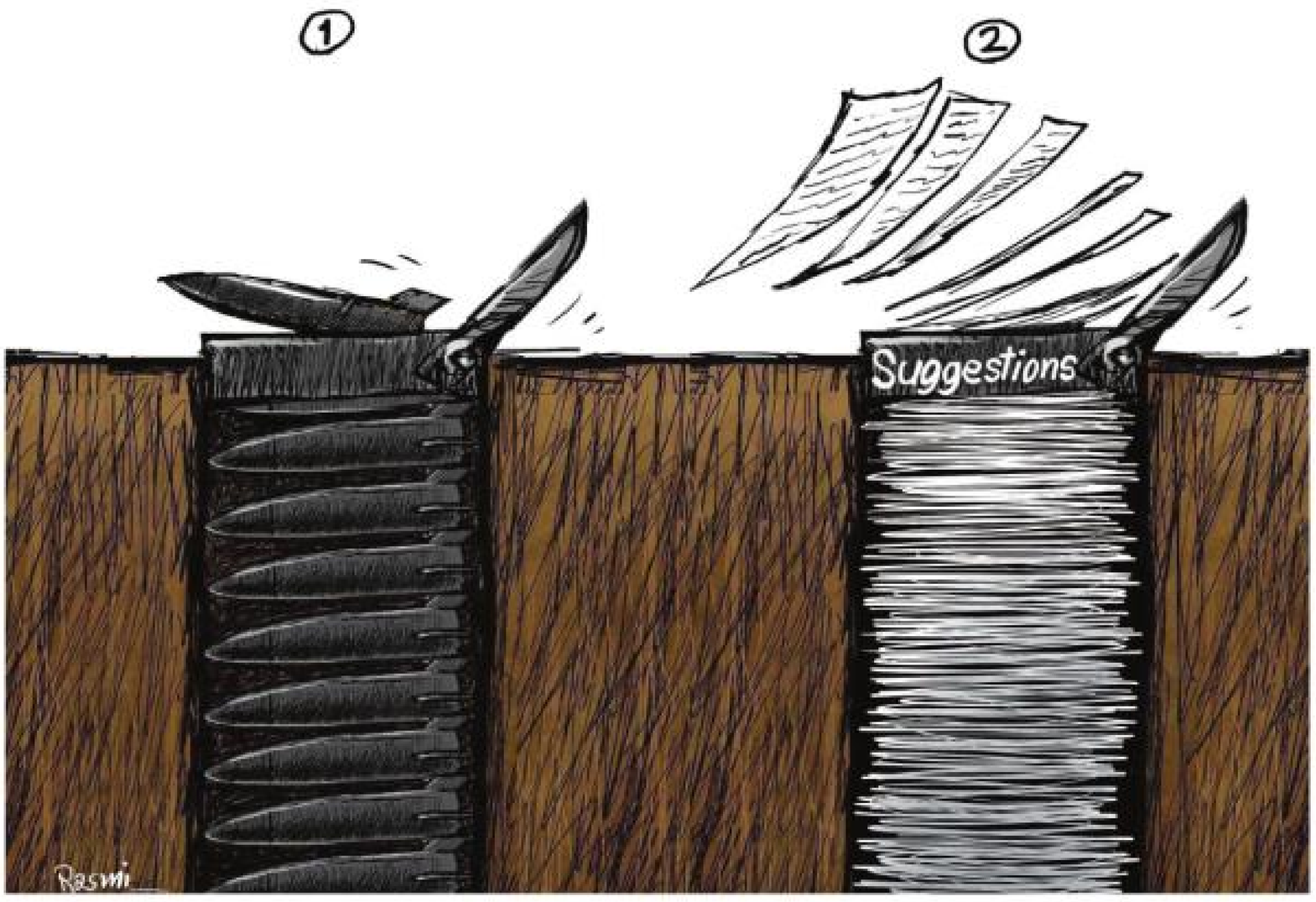
South Korea has recently emerged as a soft power giant, notably with the film "Parasite" and the TV series "Squid Game." These successes are the result of a long-term bet on film schools, creative experimentation and public policy.

Many countries in the Arab world have made the same bet. Now is not the time to let crisis disrupt those investments. Defense and resilience concerns should be the motivation to stay on course with film ambitions.

There are no barbarians at the gate of cinema. Cinema will only be dead if we believe it is. The industry is changing, of course. Artificial intelligence, social media and new voices are already transforming the art form. But the facts say that the audience is hungry for stories, both long and short. History tells us that cinema reinvents itself through time, feeding from the technologies that challenge it.

The only question is whether we believe in our own voices enough to play the long game of cinema. The answer will determine whether countries from the Arab world win or lose the most important — and peaceful — battle of all: the battle to capture imaginations.

Will Arab countries win or lose the battle for the global imagination?



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The conflict has migrated to more strategic domains, most notably the maritime space around the Strait of Hormuz

Risky waiting game as Iran conflict enters gray zone

DR. ABDELLATIF EL-MENAWY

The extension of the ceasefire in the Middle East conflict was less a moment of calm than a tacit admission that war, in its classical form, is no longer the preferred option, nor is it easily feasible. What has emerged instead is a more complex and arguably more fragile phase — a conflict that continues but in altered form, contained, calibrated and constantly renegotiated.

After weeks of direct confrontation, the US and Iran have entered what can best be described as a managed confrontation. The battlefield has not disappeared; it has shifted. The extension of the ceasefire, announced by US President Donald Trump, came not after a breakthrough but amid a stalemate, as Washington waits for a "unified proposal" from Tehran to revive negotiations. This alone reveals the underlying reality: Diplomacy is advancing not because conditions have improved but because the alternatives have become too costly.

Yet, while the guns have temporarily fallen silent, the conflict itself has not abated. It has migrated to more strategic domains, most notably the maritime space around the Strait of Hormuz, now the central axis of pressure and counter-pressure. Iran has alternated between restricting and offering to reopen the strait, while the US maintains a naval blockade tied explicitly to broader demands on Tehran's nuclear program. The result is a paradoxical situation, a ceasefire on land and a standoff at sea.

This shift reflects a deeper transformation in the nature of the conflict. Neither side can secure a decisive victory at acceptable cost. The US retains overwhelming military superiority, yet a full-scale war risks regional destabilization and global economic shock. Iran, by contrast, cannot defeat the US militarily but it does not need to. Its strategy is to endure, to impose costs and to leverage its geography, particularly its proximity to critical energy routes, to maintain relevance and bargaining power.

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The most likely trajectory in the near term is not resolution but controlled escalation. Limited strikes, proxy activity and continued economic pressure are all plausible, even expected. Iranian officials have signaled the likelihood of a "limited confrontation" before talks resume, reflecting a familiar pattern in complex conflicts: escalation as a prelude to negotiation, not its failure.

Yet this model of managed confrontation carries inherent risks.

For the wider region, the implications are profound. The Middle East is not on the brink of total war but neither is it moving toward stability. Instead, it exists in a state of prolonged suspension, in which uncertainty becomes the defining condition.

The ceasefire extension has not ended the conflict, it has redefined it. What we are witnessing is not peace taking shape but the careful management of an open-ended crisis within a framework of negotiation and pressure. It is a model that can endure for a time, but it is not inherently stable.

The real question, then, is no longer whether war will return in its traditional form. Instead, it is "how long can this fragile balance of controlled confrontation be maintained before it breaks under its own pressure?"

Opinion

How the Saur Revolution altered Afghanistan's destiny

DR. AJMAL SHAMS

Every year, Afghans around the world mark April 27 as a tragic day in the country's history, as it was on that date in 1978 that the communists overthrew the government of Sardar Daud Khan in a bloody coup. It was termed the "Saur Revolution." Afghanistan has never been a stable country since, remaining in a perpetual cycle of conflict for almost half a century. The events of 1978, claimed by its proponents to be a national democratic revolution, instead marked the beginning of a prolonged national catastrophe.

Communism, a completely foreign ideology, found supporters in the country under false promises of progressivism, social justice and equality. A conservative Muslim society that valued its ancient culture and long-held traditions had nothing in common with a sociopolitical and economic system founded on Marxism and Leninism. This new way of life usurped many of their freedoms and forced Afghans into one-party rule. Afghans have long since blamed that fateful day in April 1978 for all the calamities that followed. Even after half a century, the nation remains haunted by the legacy of the communist era, especially the Soviet occupation that began in 1979 and cost nearly 2 million Afghan lives.

That communism could have brought any positive change to Afghanistan is a view held by only a small minority, while the overwhelming majority of Afghans remain united in rejecting the very notion of communism in their country. It is true that after decades of monarchic rule and limited attention to public welfare, there was a desire for change. But communism was never a feasible alternative. A more suitable path might have been a progressive political and economic system inspired by the social democratic models of Western Europe, adapted to Afghanistan's realities.

That communism could have brought any positive change to Afghanistan is a view held by only a small minority

Just a year and a half after the communist coup, Soviet troops entered Afghanistan from the north on Dec. 27, 1979, and a full-scale invasion began. This marked the climax of the Cold War between the two superpowers, the US and the Soviet Union, with Afghanistan becoming the battleground.

The Soviet invasion was a turning point not only for the US but for the entire Western world. The NATO bloc understood that if the Soviets consolidated their position in Afghanistan and continued their advance toward South Asia, they would effectively control the Gulf and diminish Western influence in the Middle East.

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Under these circumstances, the Afghan freedom struggle received tremendous military, financial and political support from the West, especially the US.

While Afghans fought heroically to defend their freedom, it is also true that without full US support, the struggle might not have succeeded.

Although the communist era devastated Afghanistan in many ways, it also created new opportunities by exposing the landlocked country and its people to the wider world. Millions of Afghans migrated to neighboring countries and to distant destinations such as the US, Canada and Western Europe. These refugees were exposed to new ways of life, gained education and acquired new skills.

With the country facing an uncertain future, Afghans have an opportunity to revisit the past half-century of experimentation

During the republic era of 2002 to 2021, many of the technocrats who ran the government were Western-educated Afghans who had escaped communist persecution and settled abroad. Afghan expatriates in the West have also been instrumental in sending millions of dollars in remittances back home, contributing significantly to the national economy.

After the first Taliban regime was toppled by the US in 2001, Afghanistan experienced, for the first time, a genuine democratic process. This led to Hamid Karzai becoming the first democratically elected president in Afghanistan's history. The country adopted a new constitution founded on a free-market economy, which was well suited to Afghanistan's circumstances and preserved its national Islamic character.

Despite its shortcomings, it was the best constitution Afghanistan was able to enact considering all the on-the-ground realities. The country's new experiment with political and economic reforms was largely successful and should not be blamed for the collapse of the republic in August 2021. In fact, the failure to adhere to the letter and spirit of that constitution may be considered one of the contributing factors.

Now that the country faces an uncertain future, Afghan leaders, politicians, intellectuals, scholars and ordinary citizens have an important opportunity to revisit the past half-century of experimentation with different regimes and political systems. It is time to reflect on what political and economic model would best serve the nation's interests in the current geopolitical and economic landscape. Great nations learn from their mistakes and find new paths that allow future generations to prosper and succeed.

Justice, equality and a new economics for the 21st century

MARIANA MAZZUCATO AND LARA MERLING

In the run-up to this year's International Monetary Fund and World Bank Spring Meetings, the one story that cut through the noise was that the World Bank had embraced industrial policy after decades of advising against it. But while much of the ensuing debate focused on whether this "U-turn" is good or bad, overdue or dangerous, few pondered the fundamental question: What has actually changed?

The bank has merely affirmed what many of us have long argued: The framework it has promoted since 1993 — when its "East Asian Miracle" report cautioned against industrial policy tools — has not served developing countries well. Such advice, World Bank Chief Economist Indermit Gill recently observed, "has the practical value of a floppy disk today." Yet in his defense of the report, he also made clear how limited the shift remains. Industrial policy, he argued, should be "targeted and temporary," an exception to a market-led model, rather than a tool for driving broader economic transformations.

The economics that constrained development policy abroad helped fuel the far right at home

The bank's latest work confirms that industrial policy is more replicable across income levels and institutional contexts than the old consensus admitted, with a toolkit that extends beyond tariffs and subsidies. Public support for private actors, the bank now argues, should come with carrots and sticks, including withdrawal of finance from firms that underperform. This new position aligns with arguments we made in "The Entrepreneurial State" and through more recent work on the role of missions and conditionalities.

But new conclusions do not automatically produce new economics. The bank still treats the state as a mere fixer of market failures, rather than as a market creator and shaper. The question is not whether governments should intervene after markets have failed. It is what kind of economy we want to build in the first place. Which public purposes should guide investment and how can institutions govern the public-private bargain so that value is created collectively and shared fairly?

The IMF and the World Bank sit at the center of an international order whose default advice still reflects an economics not supported by real-world evidence. What they model, measure and recommend shapes how development and macroeconomic policy are done around the world. They help determine who has access to liquidity and on what terms, whose debt is treated as sustainable, whose public investment is seen as credible, and whose policy autonomy is constrained.

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The wealthy countries that fund and control these institutions are not exempt from the consequences of the same economics. For decades, the same flawed assumptions shaped policy in Europe and the US, suppressing public investment, weakening public services, treating wages as costs rather than as fuel for aggregate demand, and leaving households exposed to shocks that markets failed to manage.

We need public institutions with the capacity to invest and govern markets in the public interest

The resulting affordability crisis has now become a political one. The economics that constrained development policy abroad — hollowing out public capacity and narrowing what governments can do — helped fuel the far right at home.

Europe's response to the 2022 energy shock shows what is at stake. From 2022 to 2025, EU member states and the UK incurred $1.8 trillion in additional costs, much of it absorbed by households and public budgets, while the shareholders of firms charging higher prices benefited.

Making resilience the default, rather than the exception, requires an economic framework that governments can apply consistently. The Global Progressive Mobilization, convened by Spanish Prime Minister Pedro Sanchez, recently brought together progressive governments from around the world to start shaping a new economic consensus.

Its foundations are clear. We need public institutions with the capacity to invest, coordinate and govern markets in the public interest. We need finance designed around missions, not leverage ratios, and policy frameworks that treat fiscal space not as a market-determined ceiling but as something built by productive investment. And we need measures of value oriented around the common good.

A Global Council on New Economics for the 21st Century, co-chaired by one of the writers (Mazzucato) and First Vice President of Spain Carlos Cuerpo, will bring these elements together. Our goal is to translate the new economics into operational principles organized around justice, equality, sustainability and global solidarity. The argument for a new economics is being won. Now we must show what comes next.

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Comment

We need rain but the BBC weather forecasters have a sunny outlook

JANE SHILLING

"I got excited by a millimetre and a half on Monday, which is an alarming thought… an inch would be a blessing, half an inch would be a delight." Thus spoke Suffolk farmer Edward Vipond last week on Radio 4's *Farming Today*.

He was talking, of course, about rain – of which there was an unseasonable dearth across parts of the country in April. The East of England in particular had just 2 to 4 per cent of the month's expected rainfall. The spring barley is patchy, the sunflowers and sugar beet already parched.

"Last year we were devastated [by drought]", said Farmer Vipond. "Let's hope the bank holiday weekend, for all the wrong reasons, is a wet one."

While farmers and gardeners pray for a soggy break the tourism industry is hoping for the opposite. In March, some of the country's leading tourist venues, including Castle Howard, Blackpool Pleasure Beach and Chester, Edinburgh and London zoos, wrote to the Met Office, complaining that the Met's rain cloud icon, even when indicating light or periodic showers, can apparently deter up to 30 per cent of visitors from venturing out, with lost revenue reaching £137,000 per day.

"Weather is the UK's favourite conversation," said the departing BBC director-general, Tim Davie, announcing the Beeb's return last year to the Met Office for its general weather forecasting, after its dalliance with MeteoGroup. He was echoing Samuel Johnson's observation that "When two Englishmen meet, their first talk is of the weather".

Johnson was an indefatigable walker. In March 1727, he and his pupil, the actor David Garrick, set out on foot from Lichfield to seek their fortunes in London. The weather must have been changeable at best, but it is hard to imagine a cloud (or a cloud icon, had such a thing existed then) dampening their resolve. So why are we now so easily deterred by a raincloud symbol from venturing outdoors?

The Beeb's radio weather forecasts punctuate my day from early morning to night. Depending on the outlook, I might adjust my plans – but only in terms of adding or shedding a layer: surely the architecture of Castle Howard, or the denizens of London Zoo look just as impressive under drizzle as they do in blazing sunshine?

Yet for the past month I have had the feeling that the BBC's weather forecasters, whose very names feel as familiar and trustworthy as those of old friends, have had their thumbs on the scales when it comes to our sense of the weather.

"Another lovely day ahead" – meaning yet more unseasonable sunshine – is a forecasters' phrase I have come to dread, although my jeopardy concerns a few artichoke seedlings, not acres of spring barley, or the wildfires recently reported on moorland in West Yorkshire.

As I write, the village cricket team is playing under a blue sky dotted with fluffy white clouds. Yet some of those cricketers will be farmers, hoping for a different kind of cloud tomorrow: the leaden, grey sort whose rain will nourish their crops – and safeguard our national food security.

We are lucky with our weather in these islands: we grow all sorts from onions to olives, and if we adapt to its changes, both farmers and our tourism industry can prosper.

But it is time for those BBC weather forecasters to admit, like Chaucer, that a few sweet showers are as lovely and necessary as sunshine.

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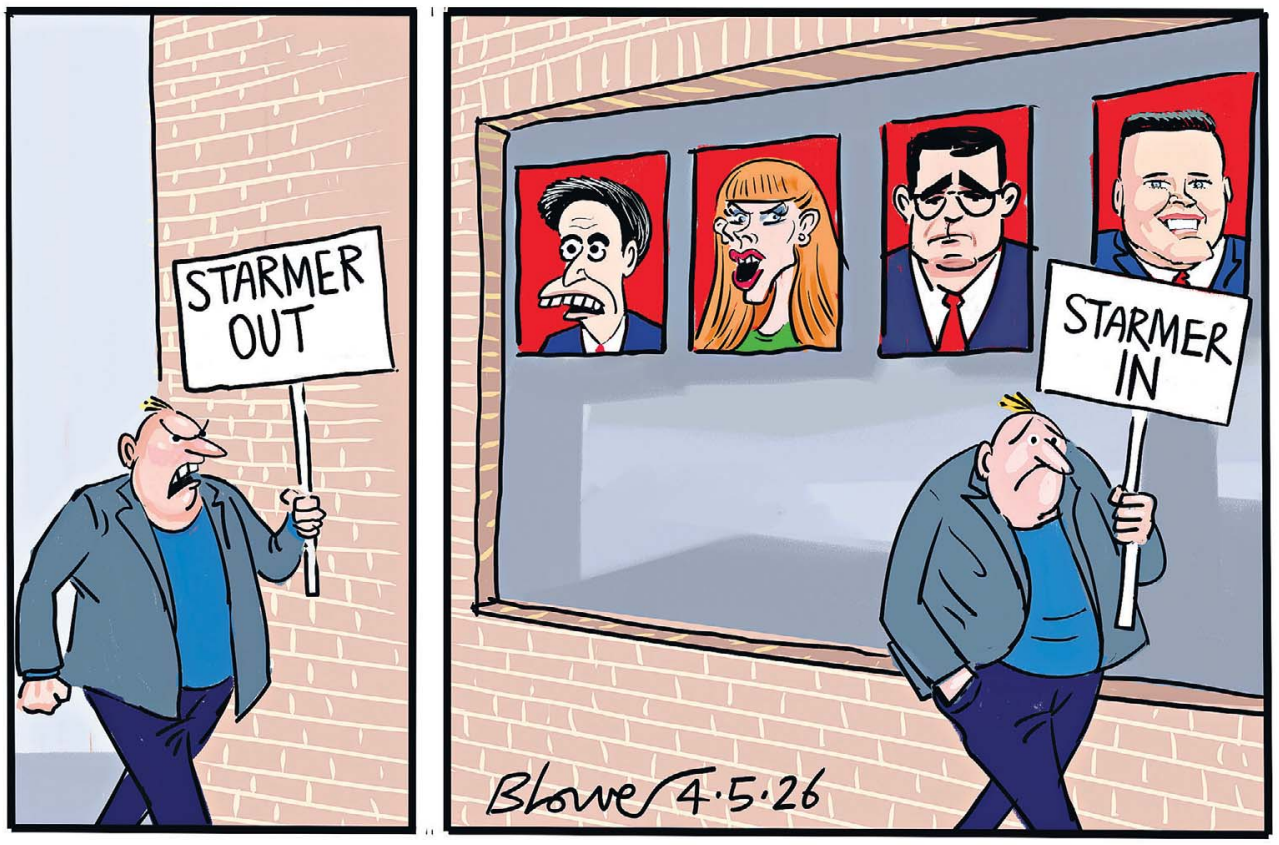

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A 'hybrid' Navy has disadvantages, but it's the only route we can afford

Unmanned vessels and drones will add capability but not the flexibility you gain from crewed warships

TOM SHARPE

General Sir Gwyn Jenkins, the First Sea Lord, used the inaugural Fisher Lecture last week to spell out his vision for a "hybrid Navy", which combines unmanned vessels with more traditional crewed ships across the fleet. The general was clear about the concept, saying "this paradigm shift is not about replacing existing capabilities. It is about increasing the mass, survivability and lethality of our force".

Recent wargames tested this assumption and the results were positive: missile capacity increased threefold, with markedly improved success rates across carrier strike, continuous at-sea deterrence protection, amphibious operations and integrated air and missile defence (IAMD). The Ministry of Defence (MoD) has also awarded Kraken Technology Group in Fareham, Hampshire, a £12.3m contract for 20 K3 Scout medium unmanned surface vessels (USVs). These are small and simple boats, but in a procurement system that finds making good use of small businesses nearly impossible, it's a good start.

But the next step to large uncrewed surface vessels (LUSVs) is the real test. Jenkins said the first will operate alongside Royal Navy warships within two years. For this to stand a chance of happening, orders will need to be placed immediately.

Shape, size, weapons and so on will need to be decided before the end of this year. Companies like Ocean Infinity have spent years refining how to operate large autonomous craft at sea, but these are comparatively simple vessels. Start integrating weapons systems with secure communications and survivability, and there are a lot of moving parts that will need to drop into place if this deadline is to be met.

The outline idea appears to be to have Type 91 Missile Barges and Type 92 Sloops – the "Type 9X" collaborative escorts. In principle, this makes sense. If the Type 92 can deploy in numbers accompanying a crewed Type 26 frigate, then your anti-submarine web has become much bigger.

The Type 91 is an intriguing proposition, as several could integrate into a task group or provide a defensive barrier protecting land areas. But to be an air defender you need some sort of radar, and so far we've needed a fairly big one. It also works better the higher it is above the waves. If the radar is on the barge and at all high up, the size of the hull rapidly goes up: putting a heavy object high up in a small vessel makes it turn over. Putting the radar in the air is excellent because it allows you to see contacts from much further away, but round-the-clock cover requires several aircraft and that gets expensive.

Tech companies argue that modern AI-powered analytics can get so much more out of a smaller, less powerful radar that this problem goes away. Anything that helps plug this should be considered.

Then there is the matter of weapons. Both the forthcoming Type 26 and Type 31 frigates will have US-made Mk 41 launch tubes. These can take a vast array of weapons but so far, we appear to be only looking at integrating Sea Ceptor. This is a short-range missile (15 miles) and therefore not an area defence weapon. It's not suitable for defence against ballistic missiles either.

Alternatively, various kinds of American-made Standard Missile (SM) can be fired from Mk 41 tubes, but these aren't cheap and you are then dependent on US supplies and support. There's a more powerful, longer-ranged version of Sea Ceptor being developed in co-operation with Poland that can go in the Mk 41 too: it's not clear whether we'll be getting that.

Then there's the matter of communications. This network of ships will need to be able to transmit large quantities of data between themselves. If this is line-of-sight, then it will limit ranges.

Having drones airborne to act as a relay could fix this, but you would need multiple drones for 24-hour capability (although this task could be doubled up with radar surveillance). If the relay is via satellite, then who owns the satellite? In a normal ship, the sensors, operators and decision makers are all yards apart by design. Make this distance hundreds of miles and it gets a lot more complicated.

If the barges and sloops are small, they will get battered in rough weather, which could mean sensors stop working. You then need to fly a team out to land on this small and unstable platform to fix it.

I cannot overemphasise the issue of things breaking. Every ship I ever served in broke down, all the time. The sea is such an unforgiving environment. If these vessels are to be made to a standard where breakdowns don't happen, how much would it cost? I'm not sure it's even possible. This might be my biggest worry.

We also won't know what cash has been allocated for all this until the long-awaited Defence Investment Plan (DIP) has been published. It has been nearly a year now since the un-costed Strategic Defence Review, on which the DIP is supposedly to be based, and still there is no sign of any actual numbers. Building an entirely new capability in just two years for a department that can't produce a spending plan in one year doesn't seem especially plausible.

Additionally, if there are no people on a ship, what's to stop it being stolen, or "accidentally" rammed? Would we go to war over something like that? I doubt it. You also can't do rescue work, disaster relief, non-combatant evacuations and all the other soft power activities that navies spend far more time doing than actually fighting. One of a traditional warship's greatest strengths is its flexibility. Unmanned ones will have less.

We must restore lethal mass to the navy and the general's vision is indeed a good way to do it. It is also the only way we can afford to, which is not the best of reasons, but that is the reality.

We must rise to the challenge or we will never climb out of the deep, dark hole that 30 years of underinvestment has left us in. This initiative should therefore be applauded and supported by those who matter, especially those who are traditionally resistant to change. The old guard, like me, chuntering about how they're not proper warships, can be ignored.

FOLLOW *Tom Sharpe on X @TomSharpe134;* READ MORE *at telegraph.co.uk/opinion*

Building an entirely new capability in just two years for a department that can't produce a spending plan in one year doesn't seem plausible

Tom Sharpe OBE served for 27 years as a Royal Navy officer, commanding four different warships

Mamdani's diamond plea is not very bright

Where exactly should the Koh-i-Noor return to… and what about the treasures in New York's museums?

LAWRENCE GOLDMAN

King Charles reigns at the constitutional centre of a nation of 70 million people and of a Commonwealth of hundreds of millions. For more than 50 years he has met all of the most important statesmen and women in the world. It is well known that he is a person of strong and deep convictions on environmental and architectural issues. Which is why it was strange to read that the mayor of New York City, Zohran Mamdani, reportedly told journalists that, given the chance, he hoped to discuss the "return of the Koh-i-Noor diamond" with the King when they met last week.

Mamdani was elected by mouthing platitudes about socialism. But this kind of request was triviality of the worst type: of all the great questions Mamdani might have raised with someone of such deep wisdom and experience, he wanted to focus on something as inconsequential as a diamond, set in the beautiful Queen Elizabeth the Queen Mother's Crown, which is a component of the Crown Jewels that reside in the Tower of London's Treasury.

Is this why he was elected? Is this the full extent of the mayor's political imagination? Does his electorate, as opposed to people from similar backgrounds to Mamdani that he might wish to impress, even care?

There is the striking ignorance of the request: where, exactly, does the mayor think the Koh-i-Noor diamond should be "returned"? It is claimed by India, to which Mr Mamdani has familial ties. However, the diamond is also claimed by Pakistan, Afghanistan and Iran.

Meaning "Mountain of Light", the great jewel was unearthed using slave labour from the diamond mines of the Deccan Plateau, now part of modern India, in the late Middle Ages.

It initially went to a local Hindu dynasty, then to Muslim sultans. It was first mentioned in 1526, when it was the possession of the founder of the Mughal Empire in India, Babur, who had himself been born in what is now Uzbekistan; two centuries later the Iranian warrior Nadir Shah occupied Delhi and took the Koh-i-Noor. After his assassination the diamond was possessed by one of his generals who founded a new dynasty in Afghanistan. A century after that, it was given to the Sikh ruler of the Punjab, Ranjit Singh, for his role in helping an Afghan king regain his throne.

By 1849 it passed to the East India Company under the Treaty of Lahore at the end of the First Anglo-Sikh War. Maharaja Duleep Singh, who later lived in exile in Scotland and became a close friend to Queen Victoria, was compelled to surrender control of the Punjab and the jewel itself under the terms of the Treaty.

All this detail tells a familiar but important story: that great artefacts and works of art have complex histories that defy easy historical or geographical categorisation. A gem owned by so many people across such an expanse of territory could go anywhere. Where does Mr Mamdani suggest? If his answer were Delhi, he would only create further international tension between nations frequently at odds with each other.

He should also be aware of the bad precedent set by the Indian government after it acquired the fabulous jewels once owned by the Nizam of Hyderabad in 1995. These reside in vaults of the Reserve Bank of India in New Delhi, where they cannot be seen.

Surely the test to be applied in all these cases of disputed possession is whether or not the object or treasure is accessible to the public? The Koh-i-Noor meets that test as part of the Crown Jewels display, visited by thousands from all over the world each week. The hypocrisy of Mr Mamdani's stance should also be noted. For a mayor of New York, of all places, to be keen on the "restitution" of great artefacts seems a dangerous folly in a city stuffed full of art derived from the other continents of the world.

The director of New York's Metropolitan Museum might have something to say if Mamdani suggested returning the Sphinx of Hatshepsut to Egypt, or the 16th-century Crown of the Andes to Peru, both of which adorn the Met's collection.

Tellingly, Mr Mamdani wears his "restitution" heart on his sleeve only when meeting a King of England, not when addressing the citizens of New York who cherish their museums.

READ MORE *at telegraph.co.uk/opinion*

Prof Lawrence Goldman is emeritus fellow in history at St Peter's College, Oxford

THE DAILY TELEGRAPH

ESTABLISHED 1855

Europe must step up if Trump cuts troops

Despite Donald Trump's isolationist rhetoric over the years, America retains a considerable military presence in European countries. Indeed, his threat to expedite the withdrawal of 5,000 troops from Germany would still leave a sizeable number on the continent.

The US has around 68,000 service members permanently assigned to 31 bases and 19 other military sites across Europe, not including temporary or rotational deployments. The bulk of these – some 35,000 – are stationed in Germany, from which a review had already identified reductions of around 5,000.

But the president went further on Saturday and said the cut would be far greater in an apparent response to comments made by German Chancellor Friedrich Merz. The latter was critical of Washington's strategy in the Gulf, claiming that the US had been "humiliated" by Iranian leaders' refusal to negotiate an end to the conflict.

Given Mr Trump's America First posture, it had been expected from his first presidency that he would gradually uncouple from Europe. But, as is often the case with the US leader, it is hard to distinguish between official policy and a fit of pique. While some senior diplomats cautioned against alarmism and pointed out there had been no formal US policy approach to Nato about troop reductions, others were less sanguine.

Donald Tusk, prime minister of Poland, said: "The greatest threat to the transatlantic community are not its external enemies, but the ongoing disintegration of our alliance. We must all do what it takes to reverse this disastrous trend."

In Mr Trump's view that should require Nato countries to stick together when one or another is embroiled in a war. Yet what he sees are his European allies condemning America's action in the Gulf and he questions why the US should remain so committed to the continent's security. The answer is that it benefits America, too, as many policymakers in Washington recognise.

Earlier talk of the US pulling out of the alliance has largely been watered down recently. Elbridge Colby, the Pentagon's leading policy official, has spoken of developing "Nato 3" and has praised Germany and other member states for their preparedness to boost defence spending.

However, they need to turn these pledges into concrete signs of greater military commitment – and that includes Britain, which has still to produce a plan for fulfilling promises of more spending. If Mr Trump really is serious about disengagement, then Europe has no option but to fill the breach.

Parties in denial

This Thursday sees one of the largest rounds of electoral contests outside a general election. Scotland, Wales and London have all-out elections, along with many English local authorities, covering about 20 million voters. Turn-out is usually far lower than at a general election but parties will still be mindful of their share of the vote and the pointers to their likely fortunes in a future parliamentary contest.

It is possible, indeed likely, that this week will see the first elections of modern times in which neither Labour nor the Conservatives occupy the first two spots in the popular vote. Polls suggest that Reform UK and the Green Party will both pick up a higher percentage than the mainstream parties, with nationalists winning in Scotland and Wales.

To a great extent this shows the electorate's frustration with Labour and the Tories. It will, doubtless, be dismissed by both as a protest rather than an irredeemable breakdown in their control.

However, were it to presage the result of a general election it would be extraordinary. The end of two-party dominance has been predicted for decades and yet at the 2017 election Labour and the Tories won 82 per cent of the vote between them and 76 per cent in 2019. Indeed, they have come first and second at every general election since 1922.

Now, however, Reform leads comfortably in the polls while the Greens are challenging Labour for dominance on the Left and among Muslim voters in key urban areas.

What looked like being a four-way fight, including the Lib Dems, is now a five-party battle. It may be a blip and the old Tory/Labour monopoly will eventually reassert itself. But if the mainstream parties fail to mount a credible challenge to the insurgents they are in for a major shock.

Not fading away

They say old rockers never die, just fade away. Not the Rolling Stones. They have never given up either performing or recording. The band, which cut its first LP more than 60 years ago, has announced that a new album to be called *Foreign Tongues* will be released this summer, no doubt followed by yet another promotional tour. Band members have been offering teasers of a possible cover over several weeks but many fans had dismissed the idea that another offering was on the way, the first since 2023. The two stalwarts of the group, Mick Jagger and Keith Richards, are in their 80s while Ronnie Wood is not far behind. That they retain their enthusiasm and creativity after all these years is remarkable.

Letters to the Editor

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There needs to be a debate about the sustainability of the state pension

SIR – There can be no doubt that our state pension system must be reformed ("Blair calls for state pension to be abolished", May 2) as it is unsustainable in the current form.

Whatever changes are made, one thing that must be done is to introduce "means testing". Many people, like my wife and I, are fortunate enough to receive work-based pensions that are index-linked. As a result, there is a significant section of the population that does not need the state pension, or could manage quite adequately if it were reduced or fixed at today's rate.

Given the state of the national finances hard choices are needed, and this would be one way of ensuring that the better-off bear some of the burden without raising taxation.
Alex Taylor
Thame, Oxfordshire

SIR – Sir Tony Blair advocates meddling with our pensions. But hang on: it was his government, with Gordon Brown as chancellor, that embarked on taxing private company pension funds investments and lowered the Minimum Funded Requirement threshold, meaning that if and when a company went into receivership, there was no pension money for the scheme's members. This destroyed defined benefit pensions in the private sector.
John Hayter
Sandwich, Kent

SIR – About 1.1 million UK pensioners reside overseas. This is not the preserve of the rich, but of ordinary people who may want or need to reside in warmer climes, or simply wish to retire in a country where the cost of living is lower and their limited means stretch further. This relocation also liberates a large number of homes for others to live in.

Of the 1.1 million, more than 40 per cent reside in countries that have no reciprocal healthcare arrangement. Healthcare for pensioners in the UK amounts to approximately half the cost of the state pension. By funding their own healthcare, they are saving the NHS about £1bn per annum.

So how are these people rewarded? By freezing their state pension. This slow starvation of funds forces many to return to the UK, where they once again need housing and draw on the resources of the NHS.

Aside from being mean-spirited, this pension freezing is economically insane. We should be encouraging more people to retire abroad, to free up homes and further ease the burden on the NHS.
Tom Archer
Newport, Essex

SIR – Pensions should increase to allow for price inflation. They should also be increased in line with salaries generally, if that is greater. However, there is no reason to have a minimum 2.5 per cent increase. That should be dropped. Disclosure: I am a pensioner.
Huw Wynne-Griffith
London W8

Landlord exodus

SIR – The British rental market is already dysfunctional, and the Renters' Rights Act risks making it worse (Letters, May 2).

Families who let a single property are treated as businesses when it suits the Treasury, yet their rental income is counted against personal tax thresholds and benefits.

The Renters' Rights Act compounds this. When a landlord regains possession to sell or occupy, they will be barred from re-letting for up to 12 months. If a sale falls through, the property could stand empty for months, with no rental income. The result is predictable: responsible small landlords exit the market, while larger institutional operators expand their share. The consequence is reduced supply and upward pressure on rents.
Robert Ross
Sutton Veny, Wiltshire

Vital tumble dryers

SIR – Tumble dryers (Letters, May 2) are essential for people with medical conditions that lead to extremely sensitive skin. For me, wearing clothes that have not been tumble-dried is agony and sets off an immune reaction.
Anna Lyndsey
Basingstoke, Hampshire

SIR – Many people in the UK cannot afford to use a tumble dryer, let alone buy one that uses a heat pump. Ed Miliband would do better to address lowering people's energy bills.
Robert Taylor
Ruddington, Nottinghamshire

SIR – The proposed tumble dryer ban has led to another round of attacks on net zero, all targeted at Ed Miliband, despite the fact that this is Government policy, based on a manifesto pledge.

We are in a climate emergency. Net zero is a woefully inadequate response but it is all we have, so we are obliged to defend it.
Professor Jason Scott-Warren
Cambridge

The Lords' loss

SIR – Though hereditary peers, as a group, will no longer sit in the House of Lords (Comment, May 2), individual hereditary peers – who are expert in their field or have undertaken distinguished public service – should still continue to be appointed in an advisory role to the chamber.

Many have served this country with distinction in the past and others will, no doubt, do so in the future.
Rohan Fernando
Epsom, Surrey

Fish depicted on a fragment of Roman mosaic floor in the city of Lod, Israel

ISTOCKPHOTO

Why it's hard to be an adventurous fish-eater

SIR – Britain, you say, has "the best seafood in the world" ("What the British get wrong about fish", Features, April 18). I just wish that more varieties of fresh fish were widely available.

Being disabled, I need to shop where there is convenient parking, which usually means supermarkets. I live in Maidstone, where the branches of both Sainsbury's and Tesco have closed their fish counters, and only have a limited choice of pre-packed fish. Trying to buy a whole trout is now virtually impossible. Waitrose still has fresh fish, but neither the choice nor availability can be guaranteed.

Perhaps it isn't just a case of shoppers not wanting to try different varieties, but also of fish not being available.
Maureen Hastings
Maidstone, Kent

The faulty logic of Argentina's Falklands claims

SIR – Marco Rubio, US secretary of state, has dismissed the Falklands row as "just an email" (report, May 1), downplaying the chances of the US backing Argentine claims to the islands.

Logic and universally accepted international conventions would also overturn such a claim. After all, Argentina is a state created by conquistadors, from land taken from a native population. The Argentinian people are therefore also geographically separate from their Spanish ancestors.

The Falkland Islands, in contrast, had been uninhibited and geographically separated from Argentina when they were colonised by British settlers, who developed the islands. Their descendants are therefore clearly the rightful legal owners and inhabitants, based on Argentina's own example.

It is also internationally recognised that a population has the right to choose any alliance it wishes to join. The Falkland Islanders have chosen to remain a self-governing British Overseas Territory, a democratic decision that is not open to question – one similar to that made by the United States 250 years ago.
Kieran Irwin
Shepperton, Surrey

SIR – I am not at all surprised that only 9 per cent of 18 to 24-year-old Britons, when questioned, felt that it was "very important" for the Falkland Islands to remain British ("Only one in 10 young people thinks it's 'very important' to keep Falklands", report, May 2). However, I think they were asked the wrong question. Had they been asked: "Do you believe that it is important for the future of the Falkland Islands to be decided by the people who live there?", I think you would have had a very different answer.
Robert Ascott
Eastbourne, East Sussex

Mental health crisis

SIR – People are asking why so many mentally unstable, potentially violent individuals are free and out on Britain's streets. It is because the institutions that previous generations built to house them no longer exist.

Until the 1970s, there was a ring of asylums around London and outside other cities, many of them set in large grounds, which were prime areas for development. Around this time, "experts" decided that their patients would be better in the community, and that their psychiatric problems could be pharmaceutically controlled.

The problem with the idea was that many of the inmates had been institutionalised for years and could not cope with independence, and they could not be relied upon to take their medication. Some took their own lives or attempted to do so. Others ended up on the streets, where they can still be seen if you walk through central London and other cities.

Our Victorian forebears realised that such people needed to segregated from society as much for their protection as for that of the public.
David Nunn FRCS
West Malling, Kent

Cancer funding

SIR – In her letter about the donation to London Zoo (April 30), Elizabeth Hill raised the issue of funding much-needed research into lobular cancer, which affects 15 per cent of women diagnosed with breast cancer. There is still no specific treatment and little dedicated research into it, and although the Manchester Breast Centre has pledged to advance knowledge of this disease, it needs funding.

In the meantime, women are dying and, despite 465 MPs having signed up to the Lobular Moonshot Project, which is lobbying the government for the £22m needed (over the next five years) to fund the research, we are no further forward.

Lobular cancer is the second most common breast cancer, but women are often diagnosed too late and given non-specific treatment. Awareness of this often overlooked disease needs to be raised. Without urgent research we will never have a specific treatment.
Susan Brown
Yeovil, Somerset

SIR – I cannot understand Elizabeth Hill's complaint about the £20m donation to London Zoo. Surely who one donates to is a personal matter. Everybody has their own "favourite" causes. Is it not better to give to something one believes in than to not give at all?
Jacqueline Hawkins
Hove, East Sussex

Firm farewells

SIR – Molly, my much-loved but plain-speaking aunt, had an unmistakable way of getting guests to leave (Letters, May 2). She would simply say: "I'm in my home. I wish that you were all in yours."
Robert Mizen
Holt, Wiltshire

SIR – My grandmother, a vicar's wife, used to walk her visitors round the garden ending at their car, where she would say: "How nice of you to call, goodbye."
Jennifer Bloomfield
Crosshill, Ayrshire

SIR – "My father would say loudly to the Airedale terrier, who was generally asleep in his basket: "It's all right, Benji, I'll take you for your walk in a minute."

It did the trick.
Carolyn Taylor
Chearsley, Buckinghamshire

Polanski has abandoned politics for conspiracies

The Greens' leader is a soundbite politician for the TikTok generation – but he won't improve their lives

POPPY COBURN

My social media feed has changed since Zack Polanski was elected leader of the Greens. Evenings spent scrolling Instagram reels are frequently interrupted by party-political adverts: clips of Polanski walking down a corridor, Polanski jogging across a street, Polanski dancing towards me with a microphone shouting "WHO'S READY TO MAKE HOPE NORMAL AGAIN?!" It's become so relentless that I walked home last night fearfully glancing over my shoulder, half expecting to see him running after me.

There's no point in complaining to Meta. I fit every possible metric for Green Party support. Young? Tick. Female? Tick. Extremely online renter with minimal savings and a pile of university debt? Tick, tick, tick. The Gorton and Denton by-election appeared to show that the party is capable of picking up votes from a wider section of society than Jeremy Corbyn ever managed but, like the former Labour leader, Polanski's core base of support is instantly recognisable. It's only in a Green Party canvassing photo that you'll see so many white faces in Newham – Polanski's advocates are the same progressive precariat who thought Corbyn was their political saviour.

But why? We are told that the unashamed radicalism of policy under Polanski's direction is what attracts so many of this group to his cause. This might be true for perennial Leftist concerns like transgender rights and Gaza. But Polanski is also at pains to show that his economic message is the really revolutionary side to his party, with a strident class-war rhetoric galvanising downwardly mobile, still-renting millennials and Gen Zers.

Indeed, Polanski is just the latest on the Left to identify the rank unfairness of the divide between those who hold assets and those who do not. The former group has been mostly insulated from two decades of lacklustre economic growth, while the latter has faced the full effects of wage stagnation and rising living costs without other investments to fall back on. Few trapped in this unhappy situation have a reason to support the established parties unless they expect an inheritance to arrive.

The trouble is that the Greens' actual policies would make this group's situation worse. Take tax. The median wage in London is just shy of £50,000. Given what we know about where the Green vote is based, we can expect that a significant proportion of them will fall around this income bracket. A person making £50,000 in London will not feel rich. But they are high earners, according to what appears to be Green Party policy, to be penalised under a plan to remove the upper earnings limit for employee National Insurance contributions. For this group, it would raise the marginal tax rate dramatically, especially if they're paying off their student loans.

Housing is an even thornier issue. The Greens are not fans of the private rented sector. To them, the only housing worth having is owned by the council, and so it appears the party will give local authorities priority to buy private homes at "reasonable" (below-market) rates if the social housing development target is not met. But the development target will never be met because the Nimbyism advocated by the party will make both private and state-controlled development unbelievably slow and costly.

Add in rent controls (which will drive even more private landlords out of the market, pushing up rents) and who will pay the highest price? The progressive precariat. Polanski would also impose a wealth tax on the richest one per cent to fund universal free childcare, nationalise water, energy and rail, and ramp up Green New Deal "investment". None of this will directly improve the lot of younger voters. This is where Polanski is different from Corbyn. The latter was seriously socialist, existing within a long tradition of the Labour Left. His mode of politics, while unworkable, at least appealed directly to the material interests of his voter base. While Polanski occasionally mentions the name "Tony Benn", really he just wants to #BeKind. His politics can be communicated through algo-friendly slogans – Free Palestine, Eat The Rich, No Borders No Nations. He is the perfect soundbite politician, being just-about-plausible for the 20-second clips through which much of the population receives its news.

Can't get a house? The rich have bought them all and decided to leave them empty. Stabbing on your road? Nasty billionaires shut down all the youth centres because of austerity. Your pay cheque isn't going as far as it used to? Guess what: the rich are hoarding all the money in overflowing treasure chests.

If you think it insults your intelligence, that's the point. The Greens are the first political party to renounce politics and revert back to the critical thinking of a pre-modern conspiracy theorist. The sun won't rise in the morning because the rich stole it.

Forgive the progressive precariat, for they know not what they do. Lacking the organisational capabilities of ethnic interest groups and the entrenched power of older degrowthers, their priorities will be the first to be ditched should their leader ever dance his way into No 10.

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Alex Zanardi

Champion racing driver who lost his legs in a crash and became a Paralympic gold medallist

ALEX ZANARDI, who has died aged 59, was an Italian Formula 1 driver and Indy Car champion in America much admired for the manner of his recovery from the loss of both legs in a racing accident in 2001; he subsequently became a double Paralympic gold medallist in handcycling and one of the faces of the 2012 London Games.

The weekend after the 9/11 attacks on the US, Zanardi was due to compete in the European leg of the CART series, the US equivalent of Formula 1. The race was to be staged at the Lausitzring in northern Germany and went ahead as a tribute to the victims of the terrorists, as security measures meant the teams were unable to fly home instead.

Zanardi, then 34, had endured several lean years in motorsport. Despite his return to CART earlier in the year after a second stint in Formula 1, he had failed to dominate the championship as he had in the mid-1990s. Yet in Germany he seemed to have recovered his touch at last.

Late on, he was leading the race when, as he exited the pit lane, he skidded on wet grass and lost control. His car ended up in the path of the oncoming racers and was cut in two when hit by Alex Tagliani's car at almost 200mph.

Both of Zanardi's legs were severed by the blow, one at the knee and one at mid-thigh; the doctor who treated him said the injury was like that suffered by a soldier stepping on a land mine. Until a tourniquet was applied blood began spurting from the open arteries, and by the time an air ambulance arrived Zanardi had lost three-quarters of his vital fluid.

He was given the last rites before being flown to Berlin. His heart stopped seven times but, defying medical expectations, he survived for more than 50 minutes with only a litre of blood in his body.

After the initial surgery, Zanardi endured another 15 operations to remove carbon-fibre splinters from his body, but within six weeks of the crash he was walking on prosthetic limbs. Within eight weeks, using hand controls, he was driving on the autostrada – at 150mph.

While not going as far later as averring that he would not have changed what happened to him, Zanardi believed that the challenges imposed by it made him a better person. In facing them, he was much helped by his natural optimism and competitiveness. "I looked not at what I had lost," he said, "but at what I had left."

In 2003 he returned to the Lausitzring and completed the 13 laps which had been remaining in the race before his accident. Thereafter, he drove for several seasons in the European Touring Car Championships, winning four races before retiring in 2009. Afterwards, he occasionally took part in events such as the Daytona 24 Hours in 2019.

Zanardi took up handcycling in 2007. Four weeks later, he claimed fourth place in the New York Marathon. Handcycling uses streamlined tricycles which are powered by the rider turning cranks (pedals) by hand, with much of the skill in racing lying in the use of the body to steer.

After victories in the Venice and Rome marathons, Zanardi won in New York in 2011 and, aged 45, went to the London Paralympics as one of the favourites in the H4 class. Competing at Brands Hatch, a circuit he had raced as a driver, he won gold in the men's 20km time trial by a margin of half a minute.

Zanardi completes the 2014 Rome Marathon: he was revered in Italy, where he helped to alter widely held but outdated attitudes to disability

AFP/GETTY

Two days later, he won the individual road race, and subsequently silver in the mixed relay. A photograph of an exultant Zanardi seated on the track, hoisting his handbike aloft, became one of the defining images of the Games.

Alessandro Leone Zanardi was born on October 23 1966 in Bologna and grew up nearby in Castel Maggiore. His father was a plumber and his mother worked as a dressmaker. He had a sister, Cristina, two years his elder, who had ambitions to be an Olympic swimmer, but she was killed in a car accident when she was 15.

That year, Alessandro began to compete in go-kart races, the thinking being that a closed circuit was less dangerous than being out on the roads on a scooter. At first using parts for his kart salvaged from his father's work, by 1987 he had won three Italian titles and the 135cc European championship (losing the 100cc to Michael Schumacher).

Although relatively old at 22 to make the step up to motor-racing, he began competing in Formula 3 and then Formula 3000, coming second in the 1991 championship. The team for which he drove was managed by Daniela Manni, who became his wife in 1996 and who was credited with making him a more patient racer, better able to assess risks.

At the end of the 1991 Formula 1 season, Zanardi was given three drives by Eddie Jordan's Footwork. He had a single outing with Minardi the year after, before signing as Johnny Herbert's teammate at Lotus for 1993. In his second race, in Brazil, he finished sixth, gaining his sole point in Grands Prix.

Zanardi then had a serious crash at the Eau Rouge corner at Spa in the Belgian event, and that, combined with being hit by a motorist while on his bicycle, meant that he missed much of the 1994 season. After 25 races with Lotus, half of which he did not complete, Zanardi was replaced by the Belgian pay driver Philippe Adams, and the Lotus team then folded.

His greatest racing days were to come in America. Driving for the Ganassi team in the CART championship, he won three races and was voted Rookie of the Year in 1996.

It was in the final race of that season that he made his name with a daring undertaking manoeuvre on the last lap, being forced to cut across the corner of a series of bends.

"The Pass", as it became known, endeared him to fans, as did his ebullient press conferences. He was also adored for what became his signature victory celebration, spinning the car to make "doughnuts" on the track, a tradition since adopted by many other drivers.

Zanardi went on to win the title in 1997 and 1998. It was one of only three times that the championship (usually more evenly matched than Formula 1) has been won back-to-back, Zanardi also set records for winning streaks and podium finishes.

His success prompted the offer of a three-year, $15 million contract to go back to Formula 1 with Frank Williams's team in 1999. The car proved unreliable, however, and Zanardi finished only six of 16 races before he and the team parted company. He then made his ill-fated return to CART.

Zanardi won two more gold medals and another silver at the Rio Paralympics in 2016 and numerous world titles. In 2018, he set an Ironman triathlon record in his class. Regarded as one of the most likeable people in the world of racing, he was revered in Italy, where he had helped to alter widely held but outdated attitudes to disability.

Zanardi collided with a lorry in June 2020 while racing on his handbike near Siena. He sustained severe head and facial injuries and was placed in an artificial coma. It was not until that December that he regained his sight and hearing, and his powers of speech the following month.

In 2022 he was taken to hospital after a fire at his home caused by defective solar panels.

His wife and their son survive him.

Alex Zanardi, born October 23 1966, died May 1 2026

Tony Wilson

Hot Chocolate co-founder who wrote *Emma* and *Brother Louie*

TONY WILSON, who has died aged 89, was a singer, songwriter and bass guitarist who founded Hot Chocolate, kings of UK soul in the 1970s and 1980s; with his co-founder Errol Brown he wrote many of their early hits, including the brooding tale of interracial love, *Brother Louie*, the tragic, soaring epic *Emma* and the joyous *You Sexy Thing*.

Anthony Wilson was born in Trinidad on October 8 1936 and moved to Britain as a boy. Musical from an early age, he was in several bands in his teens, including the Flames, the Souvenirs and the Corduroys, before joining the Soul Brothers, who put out three singles without success.

He began working as a songwriter, then in the late 1960s he met Errol Brown, a Jamaican working as a clerical officer at the Treasury who lived across the road from him in West Hampstead. They began hanging out together, playing tenpin bowling. Then when Brown began humming melodies that had come into his head, Wilson suggested they write together.

In 1968 they recruited a band with a racially diverse line-up that would vary over the next few years, and the following year recorded a reggae version of John Lennon and Yoko Ono's anthem *Give Peace a Chance*. They took it to Apple and played it to Lennon, who gave it his blessing: "I was a bit worried because I'd changed his lyrics to 'blacky, whitey, Jewish, Arabish, all we are saying...' but he didn't care," Brown recalled.

Lennon asked them if they had a name; when they said they did not he told them: "Go and get a coffee and ask one of the girls in reception to come up with a name." Mavis Smith, who worked in the press office, looked at them and said: "Hot Chocolate". The band were briefly signed to Apple, but it was the chaotic final days of the Beatles empire.

The pair wrote for other artists, including Apple's Mary Hopkin (*Think About Your Children*, a top 20 hit in 1970), *Heaven Is Here* for Julie Felix and *Bet Yer Life I Do* for Herman's Hermits. When they discovered that the Mancunian popsters were on Mickie Most's RAK label they sent a demo tape to the producer, who snapped them up and encouraged them to write for themselves.

According to Brown in later interviews, at this point, like Lennon and Paul McCartney he and Wilson started writing separately, though the songs were credited to both. He claimed that Most kept choosing his songs over Wilson's, which caused discord between them, exacerbated by the fact that Most also want Brown to handle the lead vocals.

He suggested to Errol Brown that they write together

Brown claimed that all the band's biggest hits were written by him, and when they argued over *You Sexy Thing*, they agreed that they would stop sharing royalties. "That one argument must have cost him millions of pounds," Brown said in 1998.

Wilson went solo in 1975 and signed for the Bearsville label owned by Bob Dylan's manager, Albert Grossman. He recorded his debut solo album *I Like Your Style* (1976) using Hot Chocolate's rhythm section; he invited them to decamp permanently but they elected to stay put.

Wilson crossed the Atlantic and moved to Bearsville itself, down the road from Woodstock. In 1979 he was asked to write a song for Bill Haley's new album; he came up with *Everyone Can Rock'n'Roll*, which the pioneering rocker liked so much he made it the title track.

In later years he moved back to Trinidad, where he lived with his partner Delia. His daughter Joanne became a musician and broadcaster. In 2022 his son Danny took a Fender Jazz Bass belonging to his father to the BBC's *Repair Shop*, and was delighted with the result.

Announcing Wilson's death, Danny said that he had found his father's diaries from 1970 and 1971. "Trust me, it is truly staggering," he wrote. "The knockbacks, the interviews, the touring... All the pressures of what was a cut-throat music industry in the 70s."

Tony Wilson, born October 8 1936, died April 24 2026

Lord Hunt of Chesterton

Lively and irreverent head of the Meteorological Office who studied the impact of climate change

LORD HUNT OF CHESTERTON, who has died aged 84, was director-general of the Meteorological Office from 1992 to 1997; previously Professor of Fluid Mechanics at Cambridge, he ended his career as Emeritus Professor of Climate Modelling at University College London.

Julian Hunt's research investigated and demonstrated the impact of climate change, and shaped the built environment – including the design of Canary Wharf station, which he advised should be roofed to protect passengers from the turbulence caused by the tall buildings around it.

Appointed a Labour life peer by Tony Blair in 2000, he clashed with Nigel Lawson, publishing a critical review of the former Chancellor's 2008 book *An Appeal to Reason: A Cool Look at Global Warming*.

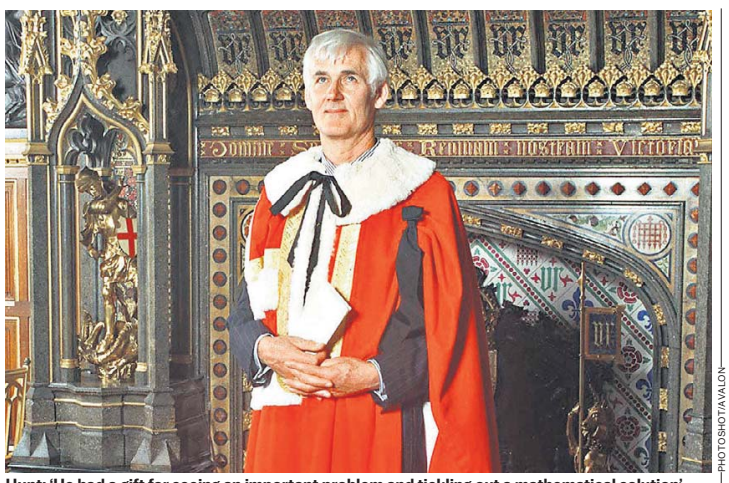
His appointment to the Met Office caused surprise within the agency, Prof Stephen Belcher, now its chief scientist, recalled.

"His lively and irreverent style didn't seem to fit with our picture of a civil servant of the time. His swashbuckling presentations were always inspiring and entertaining. But his personal charisma and authoritative scientific reputation enabled him to maintain and build the reputation of the Met Office... He had a gift for seeing an important problem that needed to be solved, tickling out a mathematical solution that provided both insight and practical predictions."

At the Met Office, Hunt's main managerial task was to restructure it to become a Trading Fund of the MoD in 1996, which allowed it manage its own finances and generate income from services. He strengthened research on the global climate, seeking greater accuracy in predicting extreme weather events. Using supercomputers, the agency doubled the accuracy of predictions on the location and path of hurricanes.

Hunt also worked through the World Meteorological Council to improve warnings for disasters from tropical cyclones to volcanic eruptions, and negotiated a freer exchange of data while encouraging the commercial application of meteorology. He promoted closer working between Europe's meteorological agencies.

In 1985, with colleagues, he formed Cambridge Environmental Research Consultants (CERC), which works on air pollution and urban environmental problems. Clients include BP, Johnson Matthey, Savills and British Sugar; Defra and the Department for Transport; and the EU. From 2001 Hunt chaired CERC as it developed environmental software, and, with other organisations, an air pollution dispersion model.



Hunt: 'He had a gift for seeing an important problem and tickling out a mathematical solution'

PHOTOSHOT/AVALON

He chaired the advisory board of Tokamak Solutions, formed in 2009 to develop "small spherical tokamaks as neutron sources and plasma research instruments" through nuclear fusion. In 2011 the company signed a contract with the ITER nuclear fusion programme to "advise on diagnostics for measuring neutron emission and fusion power".

Hunt's political career began in 1971 when he was elected to Cambridge City Council. He led the council's Labour group in 1972-73, achieving city centre pedestrianisation and traffic reduction, which was "hard fought for at the time", he recalled.

In the Lords from 2000 until 2021, he spoke on environmental development in Britain and worldwide, and the need for open scientific collaboration; he also served on select committees on scientific and environmental subjects.

Julian Charles Roland Hunt was born on September 5 1941, the son of Roland Hunt, a future High Commissioner to Uganda and Trinidad and Tobago, and the former Pauline Garnett, whose father Maxwell Garnett was made a Trinity Prize Fellow in 1910 for his contribution to the physics of light waves and glass colouration.

An early influence on Hunt was his great-uncle Lewis Fry Richardson, a Cambridge meteorologist. "As a boy I holidayed with him on the west coast of Scotland – watching the lake eddies along Holy Loch – as he pioneered the mathematics of computerised weather forecasts. Some 50 years later, I would oversee this new mastery of weather systems as Director of the Meteorological Office."

From Westminster School, he read mechanical sciences at Trinity College, Cambridge, graduating with a First in 1963. In 1967 he gained his PhD, on magneto-hydrodynamics and instabilities. At his 80th birthday dinner at Trinity, Hunt reflected that this research was now being developed as an important part of any future, zero-carbon, fusion generation system.

After lecturing briefly in South Africa and being a Fulbright scholar at Cornell University's Department of Theoretical and Applied Mechanics, he worked on wind forces on structures at the Central Electricity Research Laboratories.

Hunt returned to Cambridge in 1970 as Lecturer in Applied Mathematics and Engineering; with George Batchelor and Keith Moffatt he researched how wind turbulence is distorted on impact with structures and over terrain. "This led to our general formula of Rapid Distortion Theory, applicable to the study of the impact of high wind forces on tall buildings, and structures such as suspension bridges. This is also applicable to the modelling of complex dispersal of pollutants."

The three combined engineering research with human and environmental sciences. "Using a large, specialised wind tunnel, we were able to measure how people are affected by turbulence when walking near tall buildings," Hunt recalled.

"One of my enterprising research students used this work to assist the British yacht team with a flexible sail design for the America's Cup competition. Sadly, on the day it was to be rolled out there was an unwelcome absence of high winds."

Hunt was promoted in 1978 to Reader in Fluid Mechanics, then given his chair at Cambridge in 1990. He was also a tutor at Trinity; in the 1970s there he observed the welcome arrival of women students, and found himself dealing with serious human and social issues raised by his tutees; by the 1980s, students had reverted from jeans and bandanas to cords and tweed jackets.

Leaving the Met Office in 1997, he lectured at the Institut de Mécanique des Fluides de Toulouse, and Arizona State and Stanford universities. He also chaired the scientific committee of Project Tsunami, which applies scientific research to insurance problems.

In 1999, after a year back at Trinity, he was appointed to his chair at UCL. Hunt took a close interest in the college's new Centre for Polar Observation and Modelling, and in 2002 organised a conference on "London's Environment and Future". From 2003 to 2006 he was director of UCL's Lighthill Institute of Mathematical Sciences.

During an active semi-retirement, he became a regular contributor to *The Guardian*, the *Huffington Post*, *The Times* and Reuters. As well as climate change, he wrote about chemical weapons, Syria and global nuclear energy options.

A Fellow of the Royal Society from 1989, Hunt had a continuing scientific involvement with the MoD. He was also a professor at Hong Kong University and the Technological University of Delft. He was president of the Advisory Committee on Protection of the Sea. He was appointed CB in 1998.

Julian Hunt married Marylla Shephard in 1965; she survives him with their son, the historian and former Labour MP Sir Tristram Hunt, director of the Victoria & Albert Museum, and their daughters, Matilda, a doctor, and Jemima Hunt, the writer.

Lord Hunt of Chesterton, born September 5 1941, died April 20 2026

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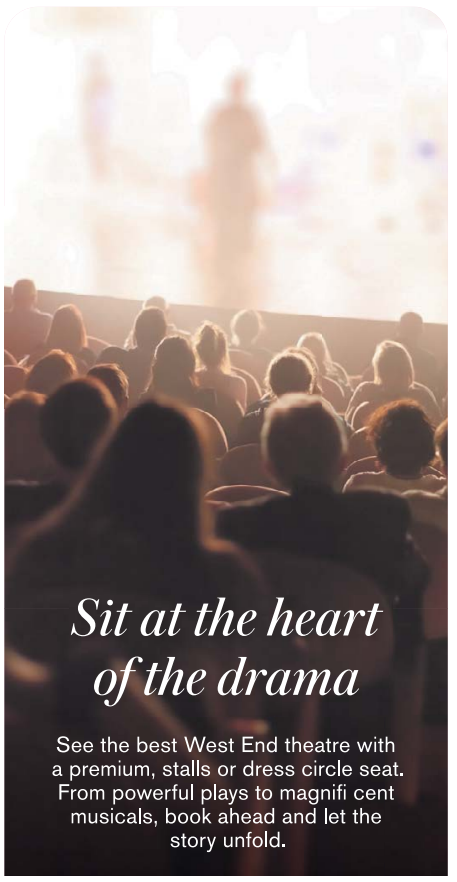

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Analysis

Andy Hunter *Old Trafford*

Matchwinner takes last lessons from Casemiro but is ready to make position his own

"You need someone like this." So said Benjamin Sesko of Casemiro after the veteran's commanding display against Brentford last Monday. Fast forward six days and the same sentiment applied to Kobbie Mainoo. Manchester United had two central midfielders like this – selfless, disciplined, destructive and creative – while Liverpool desperately need someone like this. Old Trafford revelled in the contrast, once it had recovered from a self-inflicted scare.

The redemption arc was strong at Old Trafford where United sealed their return to the Champions League by completing a Premier League double over Liverpool for the first time in 10 years. Mainoo savoured his own too. Cast aside earlier in the season under Ruben Amorim, his future with his boyhood club in serious doubt, the 21-year-old celebrated signing a five-year contract on Thursday by securing a deserved victory with his first Premier League goal since May 2024.

"Manchester born and bred" proclaimed the public address announcer as Mainoo took the acclaim of the Stretford End after his 77th-minute winner. Stockport, Greater Manchester, born and bred, to be exact. It was right to acknowledge the local connection in a fixture that reverberates around the world even when the only prize on offer was third place in the table. But it was not Mainoo's birthplace that distinguished him at Old Trafford. It was his maturity in and out of possession, his refusal to lose his head while United seemed intent on giving away victory, the Liverpool attacks he broke and the determination to beat Dominik Szoboszlai to Alexis Mac Allister's weak clearance and clinch the win that separated the midfielder from his peers.

Mainoo has only three more games to listen and learn from Casemiro alongside him. He is making the most of the Brazilian's education. "I'm so blessed to be in this position," said the matchwinner. "I used to dream about days like this. I'm glad to be here and my future's at this club."

United's central midfield provided the platform for Michael Carrick's team to dominate their fierce rivals in the first half and re-establish control having given Liverpool an unlikely reprieve early in the second. Liverpool's recovery from two goals down may have restored some credibility to their performance, and showed there is some fight in them after all, but the unvarnished truth for Slot is that the comeback owed everything to United errors and not his team's quality. Once Cody Gakpo equalised after Senne Lammens's mistake, it seemed a question of when not if United would regain the advantage, long before Mainoo supplied the answer.

The mitigating circumstances behind Liverpool's 18th defeat of the season in all competitions were extensive and genuine. They started without a recognised right-back, again, with the third-choice goalkeeper, Freddie Woodman, deputising for the injured Alisson and Giorgi Mamardashvili for the second successive game and were also without a focal point in attack. Alexander Isak picked up a minor muscle problem in training before the game and was deemed a risk not worth taking after an injury-plagued debut season.

On Friday, Slot spoke of the need to build an attack around the £125m striker when the summer transfer window opens. A necessary strategy, no doubt, but one that is also fraught with risk given Isak's injury record. The final touch of United's two first-half goals, scored via the backside of Mac Allister and the stomach or hand of Sesko, heightened the sense of misfortune among the visitors.

It is possible to be unlucky and an average team, however, as Liverpool's first-half display demonstrated. Slot's side were routinely pulled apart by United's slick exchanges down the right and contained easily by the home defence. Thoughts of another early dart from Manchester, in keeping with the mass exodus from the Etihad Stadium during the FA Cup quarter-final humbling by City, must have crossed the mind of some away fans before Amad Diallo's careless pass to Szoboszlai changed the complexion of the contest moments after the restart.

In contrast to his direct rivals in the heart of United's midfield, Mac Allister endured another afternoon to forget while Ryan Gravenberch was also on the periphery. The downturn in form of the Argentina World Cup winner can be added to the mitigating circumstances behind Liverpool's troubled season, not just this visit to Old Trafford. Having turned his back on Matheus Cunha's shot and deflected it beyond Woodman, Mac Allister erred for United's second goal with a wayward ball under no pressure straight to Mainoo. Maybe that explained the midfielder's reluctance to pass forwards towards the false 9 pair of Szoboszlai and Florian Wirtz, who was anonymous yet again. Mac Allister's tendency to stop, turn and take the safe option of a pass back to his defenders drove the Liverpool fans to audible distraction.

Mainoo preferred to be bold, to break lines and support his forwards whenever the situation presented itself. Victory, redemption and a place in the Champions League next season was his merited reward.

Top of the table

	P	W	D	L	F	A	GD	Pts
Arsenal	35	23	7	5	67	26	+41	76
Man City	33	21	7	5	66	29	+37	70
Man Utd	35	18	10	7	63	48	+15	64
Liverpool	35	17	7	11	59	47	+12	58
Aston Villa	35	17	7	11	48	44	+4	58
Bournemouth	35	12	16	7	55	52	+3	52
Brentford	35	14	9	12	52	46	+6	51
Brighton	35	13	11	11	49	42	+7	50
Chelsea	34	13	9	12	53	45	+8	48
Fulham	35	14	6	15	44	49	-5	48
Everton	34	13	8	13	41	41	0	47

▲ *Kobbie Mainoo and Casemiro enjoy completing the double over Liverpool*

GARY OAKLEY/EPA

Saka return adds zest to Arsenal's title tilt

England winger's recovery from injury is timely and his cameo against Fulham has lifted the whole club

Ed Aarons

There was one name on everyone's lips at the Emirates on Saturday night. Robert Pires, who wore Arsenal's No 7 shirt with such distinction for Arsène Wenger's Invincibles, could not stop smiling as he made his way downstairs from the press box for some half-time refreshments. "Bukayo's back," said the former France forward.

A frustrated spectator as he battled an achilles injury and his side's quest for silverware spluttered, Arsenal's talisman could not have picked a better moment to rediscover his golden touch on his first start since the Carabao Cup final six weeks ago. After leaving Raúl Jiménez on his backside to set up the first goal for Viktor Gyökeres, Saka settled everyone's nerves with a brilliant second goal and also played his part in the third. The only disappointment was that the England winger didn't emerge for the second half – a move that Mikel Arteta explained was precautionary ahead of the second leg of their Champions League semi-final against Atlético Madrid tomorrow evening. Arsenal might live to regret not piling on the goal difference given how tight things are at the top of the Premier League. But with Saka on song again, anything seems possible.

In the depths of January, after Arsenal's home defeat by Manchester United, Jamie Carragher offered a scathing view of Arteta's attacking options. "When have you ever seen a team at the top of the table, who have been top by six or seven points, but if you were picking the team of the Premier League so far, you wouldn't have one of their players in the front four?" asked the Sky Sports pundit. "Arsenal don't have that right now and that plays into the fact that they don't have a genuine superstar at the top end of the pitch. Possibly the only one is Saka, and I don't think he's been brilliant. He's not scored many goals this year or assists."

At the time, it was hard to argue with Carragher. Having been one of the Premier League's most consistent attackers over the past six years, Saka has struggled to hit the heights of recent seasons. Saturday's devastating cameo means the 24-year-old has 13 Premier League goal contributions from this campaign (seven goals and six assists) – his lowest output since 2020-21.

Saka managed a career-high 28 (16 goals and 12 assists) in 2023-24 but that was before the beginning of his persistent injuries – a problem that has been exacerbated by a ridiculously heavy workload over the past four seasons. But if there were any doubts that the player who was christened Starboy by the Arsenal supporters when he made his debut in November 2018 was still capable of producing the goods then they were answered emphatically against Fulham.

"You've seen what he did today," purred Riccardo Calafiori. "He's an unbelievable player and he's going to help us a lot."

Arteta admitted last week that Saka had been struggling to sustain his performances this season and said that rather than try to rush him back, he had taken the decision to give him "some peace" to ensure he was ready for the run-in. That pragmatism will also have gone down well with the England manager, Thomas Tuchel, who allowed him to leave the last international camp early as he looks ahead to this summer's World Cup. More importantly for Arsenal fans, it could prove crucial to their hopes of the league title – even if Arteta will continue to manage his minutes carefully. "We need to be cautious in the manner that we are loading him but you could see what he can do," he said.

Of all Arsenal's players, ending the 22-year wait to be crowned champions would have extra significance for Saka. He has been there for every step of the journey under Arteta as they have evolved into genuine title contenders and remains the team's biggest star having signed a lucrative four-year contact worth £300,000 a week in February.

Myles Lewis-Skelly also seized his opportunity in midfield on only his third Premier League start of the season following his sensational debut campaign last year. The 19-year-old has been linked with a move away from the Emirates this summer after falling down the pecking order at left-back but showed he could be a dominant presence in his more favoured role when given an opportunity. "He has the ability to play in every position. He's so gifted," said Arteta. "He's had to wait and be humble, which is not easy with what he did the season before. This was his reward."

Bukayo Saka made his first start in six weeks