



Overweight and weak

The UN is unwieldy, and needs to move away from superpower hegemony

The 81st session of the United Nations General Assembly (UNGA) could have been written off as just another year, with another set of speeches delivered on the global multilateral stage. However, this year, the UN's annual Summit has a unique sense of urgency. This is UN Secretary-General (UNSG) António Guterres's final session, after a tenure marked by a record number of global crises, conflicts, pandemics, climate disasters and the advent of a dangerous age of Artificial Intelligence. Not since the Second World War have there been so many conflicts; one study recorded more than 65 conflicts across 35 countries in 2025, the highest since 1946. Growing polarisation on every major issue, wars by global superpowers in violation of the UN charter, nuclear threats and the imposition of unilateral and illegitimate sanctions have weakened the UN, which at 81 seems overweight, weak and unrepresentative of the world. This makes it an important year for the world to unite in favour of a strengthened and reformed UN while choosing the next UNSG to guide that process over the next decade. This is an important year for South Asia too, with the election of Bangladesh's Foreign Minister Khairul Rahman as the President of the UNGA's 81st session; he will oversee the UNSG's selection. It was disappointing that the world's most powerful leaders and those at the heart of the conflicts in Ukraine, Gaza and the Persian Gulf failed to suggest solutions for the future. U.S. President Donald Trump spoke about the possible "annihilation" of Iran, and defended U.S. actions in Venezuela. Much to India's chagrin, he again claimed to have negotiated peace in conflicts including the 2025 India-Pakistan four-day war. Iranian President Masoud Pezeshkian referred to the U.S. and Israel as "murderers, terrorists and assassins". The Russian President skipped the session, while the U.S. denied visas to the Palestinian delegation. An initiative led by the European Union and a few other countries, co-sponsored by India, to build a Partnership for Multilateralism (P4M) beyond superpower hegemony is well-meaning, but was drowned out by the rancour at this year's UNGA.

For India, this year was significant as the Narendra Modi government launched a campaign for a second two-year non-permanent term in the UN Security Council in 2028-29. It was therefore surprising that Mr. Modi decided to skip the UNGA speech this year, and the multilateral summits on the side-lines, fresh from his hosting of the Delhi BRICS Summit. India's voice, of a balancing power that speaks for a rules-based international order based on the UN Charter, diplomacy and dialogue, is needed more than ever amidst the global warmongering.

Narrowed posture

Karnataka must not reject the full framework of eco-sensitive areas

The Kasturirangan Report bears a pro-development attitude that allows human occupation and a range of economic activity across the Western Ghats, yet the Karnataka Assembly unanimously repudiated its recommendations. A grievance concerned the accuracy of the remote-sensing and satellite data from 2012 that the Report uses to distinguish natural from human-dominated landscapes. Another concern was its recommendation that an entire revenue village be placed within an 'ecologically sensitive area' (ESA) if at least 20% of its area is sensitive. This could bring farmland and human settlements within the ESA even when sensitive areas occupy only a fraction of the village. Following the Centre's directive to States in 2013-14 to begin ground-truthing the Report's recommendations, Karnataka faced bipartisan opposition centered on concerns about livelihoods, with vested interests, including stakeholders of activities both the Gadgil and the Kasturirangan Reports restrict/ ban such as mining, allegedly fanning fears of displacement. The State thus elected to resist the ESA framework. Although the Assembly's resolution proposes returning to the unfinished task of producing an alternative map, the government's posture also faces a wider challenge.

The Centre's interim directions in 2013 preserve some protection for the ecosystems that the State stewards, but for the government and the businesses within potential ESAs, the delay may prolong uncertainty over what forms of planned development will ultimately be permitted. Broadly, particular States confront the economic and political consequences of local resistance and foregone development while the country as a whole will capture much of the national benefit of conserving the Ghats, so States have an incentive to negotiate the ESAs' extent down. However, as of mid-2026, Gujarat was reportedly close to an agreement with the Centre. Tamil Nadu had no substantive disagreement, Kerala wanted to reduce its already ground-truthed 9,993 sq. km to 8,805 sq. km, and Maharashtra and Goa wanted 378 and 21 villages omitted, respectively. These instances of progress (such as they are), the Ghats' continuity across six States, and the Centre's 2024 decision to allow ESAs in the region to be notified State by State, increase pressure on Karnataka without legally binding it to its neighbours' choices. Specifically, Karnataka's ability to continue rejecting the framework as a whole becomes harder to sustain if it does not also produce an equally considered alternative. Karnataka needs to reconcile the apprehensions of its farmers and workers with the responsibilities accruing to the State with the largest share (by area) of the proposed ESAs.

The case for accountable lottery regulation in India

Urge to ban tobacco, Napoleon III, Emperor of France (1852-70), replied, "This vice brings in one hundred million francs in taxes every year. I will certainly forbid it at once — as soon as you can name a virtue that brings in as much revenue." His uncle, Napoleon Bonaparte, is also credited with calling vices "very good patriots" (though the attribution is uncertain), while Ralph Waldo Emerson observed that "tobacco could cheerfully carry the load of armies". Different voices, one hard-headed insight: vices are fiscally invaluable.

Yet, every age has moral crusaders whose puritanical zeal to ban tobacco, alcohol, or lotteries rests on the misconception — and conceit — that the state can extinguish persistent demand simply by declaring an activity unlawful. Pragmatists know better: a prohibition may be morally appealing yet administratively futile — or, worse, positively counterproductive.

The United States learnt this lesson the hard way. Following a sustained temperance campaign, it imposed prohibition through the Eighteenth Amendment and the Volstead Act, from 1920 to 1933. While suppressing legal supply, prohibition left demand intact, fuelling a lucrative black market controlled by violent syndicates such as Al Capone's. Bootlegging corrupted public institutions, deprived governments of excise revenue and imposed heavy enforcement costs. The Twenty-First Amendment repealed prohibition, recognising that a regulated and taxed market could cause fewer harms than an unenforceable ban. States in India that have experimented with prohibition have faced similar challenges.

The argument for regulation

Lotteries are undoubtedly a vice, though arguably less pernicious than tobacco or alcohol. They disproportionately burden poorer households, encouraging them to stake scarce income on remote chances of reward. Rapid draws and instant games can encourage compulsive play and loss-chasing, while giant jackpots distort risk perception. Credit sales, opaque odds and manipulative advertising compound these harms. These are powerful arguments for stringent regulation, not necessarily prohibition.

Lottery bans can push players towards smuggled tickets, *matka*, *satta*, single-digit rackets and offshore portals. Operating through cash agents and mule accounts, these enterprises lack audits and age restrictions, secure prize funds and effective remedies against fraud. Governments lose lottery surpluses and GST revenue, while legitimate vendors, many of them poor or disabled, lose livelihoods and enforcement costs rise. In seeking to protect the vulnerable, the state may instead leave them at the mercy of unaccountable operators.



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Regulation, not prohibition, can curb lottery harms while preserving accountability

The state's paternalism is not class-neutral. Affluent citizens can day-trade, use leveraged derivatives or speculate in crypto-assets despite the risk of ruinous losses. Securities trading involves skill and derivatives facilitate hedging and price discovery. Yet, the state does not test competence before admitting retail traders to these markets. The Securities and Exchange Board of India found that the vast majority of day traders and futures-and-options traders incurred losses. Financial markets are legal not because everyone acts wisely, but because risks are disclosed, intermediaries regulated and fraud punished, while adult choice is preserved. Lotteries can follow the same principle, with more stringent safeguards appropriate to games of chance.

The international norm

Lotteries are legal in nearly four-fifths of countries. Blanket prohibition survives mainly in countries enforcing strict Sharia-based gambling prohibitions, such as Saudi Arabia, Iran and Brunei, and in closed ideological regimes such as Cuba.

Across diverse political and economic systems, the norm is controlled legality, with lottery surpluses allocated transparently to education, health care, sports, welfare or infrastructure. Nearly 70% of lottery jurisdictions follow the public-operator model, in which a government body, statutory authority or State-owned company runs the lottery while private firms provide retail and technology services. Under the concession model, the State regulates the lottery but grants operating rights to a private concessionaire.

Federal countries generally entrust lotteries to their constituent units while permitting voluntary cooperation across borders. Lotteries operate in 45 of the 50 U.S. States and Washington DC; all 10 Canadian provinces and three territories; all six Australian States and both mainland territories; and all 16 German Länder. Authorisation in one jurisdiction does not confer the right to sell in another. Cross-border sales require the destination jurisdiction's consent or participation in a cooperative arrangement. The U.S.'s Powerball, Canada's Lotto 6/49, Australian lottery blocs and Germany's DLTB allow participating jurisdictions to pool players and prizes while retaining regulatory autonomy.

A Lok Sabha reply of March 14, 2023, identified only nine States operating lotteries: Arunachal Pradesh, Goa, Kerala, Maharashtra, Mizoram, Nagaland, Punjab, Sikkim and West Bengal. Amid persistent State fiscal stress, the widespread preference for prohibition deserves reconsideration. Government-organised lotteries fall under Entry 40 of the Union List. The Lotteries (Regulation) Act, 1998, permits States to organise lotteries subject to Section 4 conditions,

while Sections 5 and 6 empower States and the Union Government, respectively, to prohibit lotteries that violate Sections 4 and 5.

Two necessary amendments

Supreme Court jurisprudence treats gambling, including State-organised lotteries, as *res extra commercium*, outside the protections of Articles 19(X)(g) — fundamental right to trade — and 301 — freedom of trade across India. Section 5 of the Lotteries (Regulation) Act, 1998, reflects this principle by allowing States to prohibit outside lotteries. A parallel doctrine applies to potable alcohol, allowing States to restrict or prohibit out-of-State consignments.

Yet, in *B.R. Enterprises vs State of U.P.* (1999), the Court read Section 5 down: a State may exclude other States' lotteries only by abandoning its own and becoming wholly lottery-free.

This all-or-nothing rule is difficult to justify. While a State directly oversees its own lottery administration, its oversight of another State's operations within its territory is necessarily indirect, even as it bears the local enforcement burden. This disparity in regulatory control underpins the case for excluding other States' lotteries. Faced with this revenue-regulation trade-off, Tamil Nadu (2003) and Karnataka (2007) chose total prohibition, thereby forfeiting the option of running accountable public lotteries of their own.

Parliament should amend Section 5 to clarify that the provision applies "whether or not the prohibiting State organises a lottery of its own". Destination-State consent should be decisive, subject to uniform treatment: a State must either admit all outside lotteries or exclude them all.

Smaller States, especially in the northeast, may fear exclusion from larger markets, but compulsory access is no remedy. A new Section 4A should authorise two or more States to establish a common lottery by agreement, pooling players, prizes, technology and costs, as in successful multi-State lotteries elsewhere.

Transparent regulation offers a more accountable alternative to prohibition. Section 4 permits States to sell tickets directly or through distributors or agents. While marketing agents may provide guaranteed revenue, departmental operation can be more transparent and enable retail distribution through small vendors, persons with disabilities, women's self-help groups and cooperatives, broadening livelihood opportunities and limiting intermediary capture.

Kerala follows this model. In FY 2023-24, it earned ₹2,883.80 crore — ₹1,297.71 crore in net lottery revenue (or surplus) and ₹1,754.09 crore in State GST. It channels lottery surpluses into health care and welfare. Kerala's public-operator model offers a useful, though not exclusive, template for reform.

Revisiting India's nuclear doctrine without revising it

India's nuclear doctrine has remained largely unchanged for over two decades, even as its security environment has shifted dramatically. Since its operationalisation in 2003, China's military rise has accelerated, Pakistan's nuclear posture has evolved, disruptive technologies have reshaped deterrence, and geopolitical competition has become more multipolar. Yet, the doctrine's core principles — credible minimum deterrence and a declared No First Use (NFU) posture — have endured, albeit with a specific provision retaining the option of nuclear retaliation following a major biological or chemical attack on India or Indian forces. The question is whether a framework crafted for the early 2000s remains fully aligned with the security challenges of the mid-2020s.

A doctrine for another era, strategic shifts

India's nuclear doctrine emerged from the distinct strategic context of the late 1990s. The 1998 Pokhran-II tests established India as a nuclear weapons state, while Kargil (1999) showed that nuclear deterrence did not rule out conventional war. The 1999 Draft Nuclear Doctrine and the Cabinet Committee on Security's January 4, 2003 decision sought to reconcile deterrence with restraint. The 2003 decision operationalised a posture based on credible minimum deterrence, No First Use (NFU) and massive retaliation to a nuclear attack, supported by a survivable second-strike capability and firm civilian control. Judged by its original objectives, the doctrine has provided continuity, predictability and strategic stability for more than two decades. The question is whether the assumptions underpinning it remain stable.

The strategic environment underpinning the framework has changed in three important ways. First, China and Pakistan have grown more strategically aligned. When the doctrine was



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India's nuclear doctrine faces new strategic, technological and geopolitical challenges

formulated, the two nuclear-armed neighbours posed distinct challenges; today, these challenges are increasingly interconnected. China has expanded and modernised its nuclear forces, strengthened military infrastructure along the Line of Actual Control and deepened defence cooperation with Pakistan. Pakistan has diversified its nuclear capabilities, including tactical nuclear weapons intended to offset India's conventional advantage. India must therefore account for the possibility that pressures from two closely aligned nuclear adversaries could interact during a crisis.

The second shift is technological. Artificial intelligence, cyber capabilities, space-based surveillance, hypersonic weapons and ballistic missile defence are reshaping deterrence by shortening decision-making timelines, increasing the vulnerability of command-and-control networks and complicating assumptions about assured retaliation. These technologies do not invalidate the doctrine's core principles, but they alter the environment in which they must operate. Nuclear deterrence ultimately depends on the alignment of doctrine, capability and survivability.

The third shift is geopolitical. The Indo-Pacific has become a key arena of great-power competition, while the international system has grown more multipolar. U.S.-China rivalry, closer China-Russia coordination and India's expanding partnerships have reshaped the security environment. Nuclear doctrine can no longer be viewed solely through bilateral deterrence; regional crises are increasingly shaped by wider geopolitical competition.

Review, not revision

Strategic doctrines are policy instruments, not immutable documents. In India's case, a review could examine emerging technologies, command-and-control resilience, second-strike

capabilities and the continuing relevance of existing concepts, including the doctrine's approach to retaliation.

The issue of massive retaliation deserves scrutiny. Pakistan's tactical nuclear weapons were intended to complicate India's response options below the level of strategic exchange. A review could assess whether India's declaratory posture provides sufficient deterrent clarity across nuclear contingencies, without necessarily changing its core principles.

There are, however, reasons for caution. India's doctrine has reinforced its image as a restrained and responsible nuclear power while providing continuity in deterrence. Ambiguity over established principles, particularly NFU, could create uncertainty, encourage adversaries to recalibrate and complicate crisis management. The priority, therefore, should be to strengthen operational capabilities, modernise delivery systems and improve command-and-control resilience rather than reopen declaratory policy.

A review of NFU need not mean abandoning it. It could reaffirm its rationale, clarify its scope and ensure that supporting capabilities remain credible. Revising a doctrine is not the same as revising it.

Building credible capabilities

For India, any doctrinal review should also assess survivability, command and control, intelligence, early warning, cyber resilience and the nuclear triad. The aim should be to ensure that India's declared policy remains backed by credible capabilities in a changing strategic environment, while aligning nuclear policy with its broader diplomatic objectives and strategic autonomy.

Ultimately, a nuclear doctrine is an instrument of statecraft, not an immutable policy. India's commitment to restraint, credible deterrence and responsible nuclear stewardship remains an enduring strategic asset.

LETTERS TO THE EDITOR

Sanctity of public office

The desire to cling to office indefinitely, while disregarding transparency, accountability, the Constitution and the law, appears to have become the new norm in India. The values of humility, transparency and accountability in public life seem to have become things of the past, especially under the

government of the day. Its top leader may have many achievements to his name, but he has also encouraged an office-centric political culture within the BJP and among those joining it from other parties. The priority appears to be retaining office rather than upholding the sanctity of constitutional democracy. Leader of the Opposition (Lok Sabha) Rahul Gandhi

has urged Chief Election Commissioner Gyanesh Kumar to resign (Page 1, September 25). Why should Mr. Kumar, when he has the backing of those at the top? The Election Commission of India's constitutional responsibility is to ensure free and fair elections, and its decisions must command public confidence. The question is: why should constitutional

institutions not function in the letter and spirit of the Constitution and the law? Holding a constitutional office means little if its occupant does not uphold the values and the responsibilities attached to it.

P.K. Sharma,
Barnala, Punjab

Resignation demand

If the Chief Election

Commissioner of India quits, will all the deleted names be included in the Special Intensive Revision list? Conducting elections in a country such as India is a huge task because of its large population. In the last round of elections held in some States, the process was appreciated by many developed countries, whose representatives had said that the elections were

conducted in a free and fair manner. All appreciation goes to the Election Commission of India. Demanding the resignation of hardworking people with clean hands will only affect the country.

K.V. Sundaravelu,
Bengaluru

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GROUND ZERO



Rajthal residents in Hansi, Haryana, keep round-the-clock vigil at the village entrance to prevent entry of drug peddlers. SHIV KUMAR PUSHKAR

The villages fighting back against drugs

The drug menace has spread from the borders of Haryana to the State's agricultural and semi-urban heartland, forcing khaps, gram panchayats, and community groups to step in where police action alone has failed to contain it. Communities are resorting to night patrols, fines, and direct action against peddlers.

Ashok Kumar reports on these efforts and the widening gap in de-addiction and rehabilitation facilities

In the side of a busy road cutting through Rajthal village in Haryana's Hansi district, around 150 kilometres north-west of Delhi, stands a bright red-and-white banner tied to a yellow police barricade. In bold letters in Hindi, it reads, "Nasha ke khilaf gram panchayat Rajthal ka sukhi sandesh" (The strict message from the Rajthal gram panchayat (village council) against drug/substance abuse). The warning below says: sell drugs in the village and pay ₹1 lakh; help a drug peddler get bail and pay another ₹1 lakh.

A few steps behind the barricade, men wearing white kurtas and turbans sit on red plastic chairs in a circle in the shade of a roadside tree. They are Rajthal's round-the-clock *thekri pehra* (community-led vigil). Their job is to guard their village and the entire stretch against drugs.

Satyawan Singh, 65, says, "We have taken it upon ourselves to not just rid our area but also the entire State of drugs. The Satrol khap, Nau-gama khap, and Bara khap (the names of various khaps active in Hissar and Hansi) have extended support to us, which has given our campaign new strength. Since then, we have become even more active and have started reaching out to every village grappling with the drug problem."

According to the police and locals, the drug crisis first took hold in Haryana's districts bordering Punjab and Rajasthan — Sirsa, Fatehabad, Jind, Kurukshetra, Kaithal, and Ambala — as heroin, locally known as *chitta*; poppy husk; and pharmaceutical drugs made their way across porous State borders. From these entry points, local dealers and small-time peddlers gradually built their own networks, carrying the trade deeper into the State's agricultural and semi-urban heartland, into districts such as Hissar, Hansi, Rohtak, Sonapat, and Panipat.

The trade has grown exponentially over the years. As per the Magnitude of Substance Use in India-2019 report, commissioned by the Ministry of Social Justice and Empowerment and conducted in collaboration with the National Drug Dependence Treatment Centre, All India Institute of Medical Sciences, New Delhi, 5.9 lakh people in Haryana need help for opioid-related problems. This is the third-highest number among States, after Uttar Pradesh (10.7 lakh) and Punjab (7.2 lakh).

Haryana is also among the States with the highest proportion of its population affected by opioid use, along with Punjab, Delhi, and several northeastern States — Mizoram, Nagaland, Arunachal Pradesh, Sikkim, and Manipur. The report estimates that 1.2 lakh people in Haryana need help for sedative use, putting it among the six States with the highest usage. Another 55,000 people in the State inject drugs, the sixth highest in the country.

As addiction has spread and concerns have grown over the efficacy of police action, villages have begun looking beyond the State machinery for ways to contain the problem. Khaps, social organisations, and gram sabhas have formed



We had reached a point where drug users and sellers had turned the village into a marketplace. People would enter homes and stand in queues to buy smack, *chitta*, ganja and other drugs.

ANIL GODARA
Brother-in-law of the Sarpanch in Rajthal village

committees to monitor suspected drug peddlers and even impose their own deterrents.

Keeping vigil

Residents say the drug problem in Rajthal, on the Jind-Hansi link road, has been around for nearly a decade, but it has worsened sharply over the past three years. They allege that the number of houses involved in selling drugs has increased from two or three to 25 or 26.

With the spread of drugs has come a rise in thefts, particularly from agricultural fields, say residents. They allege that to finance drug consumption, copper wires from submersible pumps, motorcycles, utensils, and other articles are stolen and sold as scrap.

"We had reached a point where drug users and sellers had turned the village into a marketplace," says Anil Godara, 38, the brother-in-law of Sarpanch Renu Devi. "People would enter homes and stand in queues to buy smack, *chitta*, ganja and other drugs."

According to Poonam Devi, 38, a yoga teacher working in the Haryana Kaushal Rozgar Nigam, a government department, the spread of drug use in Rajthal has changed the way women move through public spaces. "Those who use drugs stare in an improper manner at women. Sometimes they try to stop women riding scooters when they are returning from work," she says.

Devi says the bus stand has, in particular, become a place of concern. Women who park their scooters or motorcycles there are often warned by shopkeepers that their vehicles could be stolen by drug users. She says a bicycle and a motorcycle have been stolen from the area.

For girls and women going to school or college, the fear extends beyond theft. "We do not even feel safe wearing bangles or chains," she says. Women who once moved around the village freely in the mornings and evenings now often go out accompanied by men, she adds.



The poster in Rajthal warns that selling drugs in the village will attract a fine of ₹1 lakh; helping a drug peddler get bail will attract a fine of another ₹1 lakh. SHIV KUMAR PUSHKAR

Alarmed by the spread and addiction to drugs, locally known as *sukha nasha* (dry intoxicant), as well as the spurt in thefts, the residents of Rajthal approached the district administration and the police to seek their support in launching their initiative. They also held a gram sabha meeting, where residents across age groups agreed to participate in the campaign. The village then formed the *thekri pehra* at two points to keep a watch on people and vehicles entering and leaving Rajthal.

The *thekri pehra*, launched on August 26, involves groups of young men keeping watch, with 15-20 people stationed at each point after 9 p.m. During the day, the number of villagers, including the elderly, can rise to 50-60 or more. Village youth also ride motorcycles to chase people suspected of entering the village to buy drugs.

This practice has a history. The Punjab Village and Small Towns Patrol Act, 1918, outlines "the performance of nightly patrol duty by the inhabitants of villages...in case of emergency."

Residents say they have caught more than 400 people so far, including students, farmers, youth from well-off families, and a few girls aged 17-18. In several cases, parents have learned about their children's drug use only after the villagers informed them, say residents.

Ankur Bisla, 30, who is part of the *thekri pehra* team, says most of those caught consuming drugs are from Haryana, including neighbouring villages and areas around Panipat, Sirsa, and Sonapat. "Some of them had travelled from Gurugram as well," he says.

However, the job is not easy. After the vigil restricted the movement of outsiders into the village, drug sellers have become cleverer by taking supplies outside the village. Residents say they have noticed vehicles leaving the village in the wee hours, between 1 a.m. and 4 a.m.

Hansi Superintendent of Police Vinod Kumar says community participation has become an important part of the police campaign against drugs. In response to the villagers' demands for greater police presence, the police deployed four personnel, including a woman constable, along with a police control room vehicle and a checkpoint, a month after the campaign was launched.

On September 23, around 150 police personnel and a canine squad conducted a three-hour house-to-house search operation in the village. "But such operations can be challenging as people often get alerted by police activity and move or conceal contraband," he says.

When the people take over

Independent journalist Vijender Kumar, who runs a YouTube Channel called NewsMike24, says there is a history of illicit liquor trade in some of these villages. He says what was once largely confined to liquor has evolved into a more dangerous drug market, increasingly involving women too, and affecting the youth from poor families. The survey highlights the vulnerability of children: Haryana has 35,000 children who need help for inhalant use, the fourth-highest number among the five States with the highest figures.

The emergence of heroin is particularly worrying, says Kumar. He points out that 5.7 kg of heroin was seized in Jind alone a month ago, valued at around ₹1 crore in the international market.

Kumar says the fight against drugs in Haryana's villages is increasingly being led by residents. He recalls how Ashrafgarh-Dauri village in Jind, close to the Punjab border, confronted the problem about two years ago. "Villagers formed a 20-25-member team comprising the youth, government employees, retired people, and ex-convicts to maintain round-the-clock vigil. They installed 25-26 CCTV cameras outside the houses of alleged drug sellers and imposed fines. The number of people coming into the village to buy drugs reduced," he says.

Lochab village, once a drug hotspot, also brought drug activity under control after the panchayat imposed fines and took strict action. "But



The police focus on curtailing the commercial supply of drugs, but the combination of the dark web, cryptocurrency, and courier services has changed the way drugs are trafficked.

RAJENDAR KUMAR MEENA
Deputy Inspector General of Police,
Haryana State Narcotics Control Bureau

new hotspots have emerged in Rajthal, Petwar, and Sulchani, where drug supply remains high," says Kumar.

Rajthal resident Ratan Sharma says the police are reluctant to conduct searches in cases involving small quantities of drugs. "They say they cannot register a case over one or two packets. But if searches are not conducted, how will larger quantities be recovered," he asks.

Sagar Preet Hooda, Director General of Police (DGP), Chandigarh, and a native of Haryana's Rohtak, has conceptualised a village-based programme that brings local residents together to tackle the growing drug problem as a community-led social intervention. Called the Panchgama development model, the programme will be launched in Jind on October 11. In its first phase, it will cover nearly 300 villages, grouped into 60 clusters of five villages each.

"Through the Jind social forum, volunteers with roots in Haryana will share their experiences, expertise, and networks to support rural youth. They will work alongside existing community and government institutions," he says.

Several khaps, too, have announced that they will impose fines on those indulging in drug-peddling in view of the growing problem.

Even as communities are taking matters into their own hands, Bisla questions the lack of political will in dealing with the growing menace. "On the one hand, the BJP has launched the Nasha Mukht Punjab Yatra (an anti-drug political campaign) in neighbouring Punjab. On the other, it has done precious little to contain the menace in the State that it has governed for the past 12 years," he says.

State measures and hurdles

As part of its efforts to combat the drug menace, the State government constituted the Haryana State Narcotics Control Bureau (HSNCB) on August 25, 2020. So far, 2,353 FIRs involving commercial quantities of narcotics have been registered under the Narcotic Drugs and Psychotropic Substances Act, 1985, and 6,256 accused people have been arrested, according to a press conference held in June this year by Additional Director General of Police, HSNCB.

In a parallel crackdown on drug-derived wealth, assets worth ₹72.70 crore have been seized, frozen, or attached to date. As part of the campaign against habitual and organised traffickers, preventive detention orders were issued against 156 accused under the Prevention of Illicit Traffic in Narcotic Drugs and Psychotropic Substances Act, 1988. In addition, property attachment proceedings were initiated against 432 individuals to target illegally acquired assets generated by the drug trade.

Rajendar Kumar Meena, Deputy Inspector General of Police, HSNCB, says that going by drug seizures, heroin is the most prevalent in the districts bordering Delhi — Gurugram, Faridabad, Jhajjar — followed by cocaine, MDMA (a synthetic psychoactive drug), ganja, and poppy straw. "The police have a three-pronged strategy to combat the drug menace — enforcement, awareness, and de-addiction," says Meena, conceding that supply cannot be totally curtailed till the time that there is demand.

"The police focus on curtailing the commercial supply of drugs, but the combination of the dark web, cryptocurrency, and courier services has changed the way drugs are trafficked."

The gaps in rehabilitation

Vipin Sharma, the founder of Ankush Foundation, a drug rehabilitation centre in Hissar, says Haryana's response to addiction remains focused on de-addiction and regulatory compliance and gives little attention to long-term rehabilitation.

After more than two decades in the field, Sharma, a recovering addict himself, says the biggest problem is that policies are often framed without consulting those delivering services, such as rehabilitation and de-addiction programmes, on ground.

Sharma argues that frequent inspections and increasingly prescriptive rules have made it harder for rehabilitation centres to function effectively. "Rules requiring clinical psychologists at every centre don't take into account the limited availability of trained professionals. There is also excessive focus on specifications, such as the distance between beds. These requirements divert attention from the central problem of treating addiction," he says.

For Sharma, the largest gap is the absence of sustained rehabilitation after medical treatment. "De-addiction is a medical treatment. It can address physical dependence on a substance, but it is not the complete solution," he says. "Without long-term rehabilitation, a patient's psychological dependence is not addressed."

Sharma says Haryana lacks a rehabilitation centre run or supported entirely by the State government (there are eight centres in the State supported by the Union government). Private centres operate without government assistance, but face regulatory and licensing hurdles.

An inmate at the rehabilitation centre says, "For an addict, quitting drugs is only the beginning. The real battle is staying away from them — a struggle that can last a lifetime." Recovery, he says, cannot end at the centre's gates; it requires the continued support of family and society to help those battling addiction rebuild their lives and find their way back into the mainstream.

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BECAUSE THE TRUTH INVOLVES US ALL

Trump-Xi bonhomie can't paper over tensions

LITTLE OF substance was achieved at the Donald Trump-Xi Jinping summit this week, particularly on the three Ts that have come to define the US-China relationship. On trade, US Treasury Secretary Scott Bessent said the two countries had agreed to extend the Buzan trade, which expires in November, when China's suspension of its rare-earth export restrictions is also due to end. On technology, Trump said he was content to leave AI "exactly where it is", while Xi merely stressed the need to maintain human control over it. And on Taiwan, Xi urged Trump to oppose Taiwanese independence, even as the US has held back an arms package for Taiwan worth about \$14 billion. The pageantry, however, appears to have been the overarching objective of the meeting. A strategy of managed stability suits both sides. The US is bogged down by the war in Iran with the midterm elections around the corner, while Xi is contending with a slowing economy ahead of next year's Communist Party Congress.

What does stand out from the summit, however, is the red carpet Trump rolled out — literally — for Xi, personally receiving him at Joint Base Andrews for their third meeting in less than a year. Trump referred to their "truly great friendship", and Xi reciprocated by using the US President's own catchphrase while stressing the need for closer cooperation. "Achieving the great rejuvenation of the Chinese nation and making America great again can go hand in hand." Such personalisation of the US-China relationship may help the two sides keep tensions temporarily contained and preserve a fragile *modus vivendi*. The US is heavily reliant on China's critical minerals, and Beijing wants an open market in the US for its goods. This means that neither country has an incentive to tackle any of the fundamental disputes. But managed stability can also allow unresolved tensions to accumulate, making a future rupture more difficult to contain.

Nowhere are the risks more apparent than in the case of AI. Despite growing calls for an agreement on AI safety, especially amid warnings from leading US AI companies that the pace of AI development needs to slow, neither Washington nor Beijing has much incentive to constrain a technology they see as a source of strategic power. The history of arms control offers little reason to expect either side to make concessions. The worry for other countries, including India, is that an AI dialogue between Washington and Beijing could evolve into a framework in which the two leading powers set the rules for everyone else. Pursuing cooperation with allies and building indigenous capability should be New Delhi's priority.

Growth holds up for now. Inflation clouds outlook

OVER THE past few days, global agencies have upgraded their full-year growth estimates for India, following the first-quarter GDP estimates that showed a stronger-than-expected economic momentum. The Asian Development Bank, for instance, is now pegging growth at 7 per cent, up from its earlier forecast of 6.6 per cent. S&P Global is now forecasting the economy to grow at 7 per cent, while the OECD has raised its projection from 6.3 per cent to 7.1 per cent. Moody's has also raised its growth forecast for the year to 7 per cent from 6 per cent.

Some of the commentary has revolved around investments, industrial activity and exports as driving growth, despite concerns over activities being impacted by the conflict in West Asia. Industrial production has been healthy, with IIP growing at 6.3 per cent during April-July and manufacturing up 7 per cent. The Centre's capital spending is growing at a brisk pace — capex has surged by almost 30 per cent during April-July this year. Merchandise exports have grown at a robust 17.6 per cent during April-August, aided perhaps by a weak currency. Growth, however, is expected to moderate towards the second half of the year. As per S&P Global, "growth to ease in the second half of the fiscal year as the tailwinds from general sales tax rationalisation and income tax cuts diminish". The OECD also expects the momentum to weaken, "before a gradual recovery takes place in 2027". The farm sector has emerged as a key area of risk. As per the ADB, "Worse-than-expected El Niño could reduce agricultural output and raise food inflation" in the wider region.

Price pressures are building up in the economy, and the expectations of higher interest rates have gained traction. S&P Global expects inflation to average 5.1 per cent, and the RBI to "raise its policy rate by 25 bps in the current fiscal year". As per the OECD, "India is projected to raise policy rates temporarily to help offset stronger inflationary pressures." The central bank's monetary policy committee is slated to meet in a few weeks. The growth-inflation dynamics should tilt the scales towards tighter policy.

A bronze medal, quiet gains in table tennis

TABLE TENNIS is the slowest-growing among racket sports in India. That impression is largely because there is no poster girl or poster boy for the sport in the country. But the mixed doubles bronze won by Diya Chitale and Manish Shah at the Asian Games indicates India's slow but steady progress. The duo defeated Hong Kong's World No. 4 pair, Wong Chun-Ting and Doo Hoi Kem, but lost in the semis to the World No.1 Chinese pair, Wang Chuqin and Sun Yingsha.

Amid the shambles at the shooting range and the slow start in other sports, TT has made unparalleled progress. This is the racket sport's fourth bronze after the medals won by the men's team and Manika Batra-Sharath Kamal mixed doubles in 2018 and Aysha Mukherjee-Sutirha Mukherjee in women's doubles in 2022. TT has a thriving national league, the UTT. But Manish from Vadodra and Diya from Mumbai have kept the legacy of the sport's traditional TT hubs. They won a Muscat World Table Tennis Contest title earlier this year, defeating the Chinese pair of Huang Zouzheng and Shi Xunhao. Last year, they became the first Indian pair to qualify for the season-ending WTT Finals. This incremental growth has gone unnoticed.

Table Tennis is a global sport because of low entry-level expenses, but it is among the least watched at the Asian Games, where China, Japan and Korea tend to be impregnable. A toehold for India is significant, especially because the sport remains riddled with problems, including borderline selection calls. Players get little recognition unless an Olympic medal arrives. Aysha Mukherjee's victory over World No.1 Sun Yingsha at the World Team Championships, for instance, hardly stirred any Indians. But an Asian Games medal helps.

The Editorial Page

A declining United Nations is not good news for a rising India



SYED AKBARUDDIN

INDIA IS rising as the United Nations (UN) loses authority. Rivalry among major powers may create room for manoeuvre but it also makes agreements harder to trust. For an aspirational power, that is a poor bargain. Indian diplomacy must win more influence over UN decisions while helping make those decisions matter.

This year's General Assembly is unlikely to resolve that tension. Governments whose consent the UN needs are often pursuing objectives it was established to restrain. A week of diplomacy in New York will do little to change the calculations that lead powerful states to bypass the organisation or block its work.

India needs agreements that hold when relations sour. New Delhi has long defended sovereignty and resisted intrusive international rule-making. Yet constraints imposed by powerful countries can leave it with even less say. The question is who writes the rules and how much influence India has over them. Multilateral arrangements give India a voice in those negotiations and room to cooperate with countries it disagrees with elsewhere.

Ukraine, Gaza and the war involving Iran and the Gulf expose the Security Council's inability to restrain its strongest members and their clients. Sudan demonstrates the consequences of neglect. The Council was designed to work when the major powers could agree. Its veto gives each permanent member the means to block action when they cannot. Appeals to the Charter have little effect when those expected to uphold it can prevent its enforcement.

Unilateral coercive measures extend this problem into everyday commerce. An Indian company may be free to trade under Indian law yet find that a foreign bank will not process its payment or an insurer will not cover its cargo. Control over these networks lets powerful states project national restrictions far beyond their borders without authorisation from the UN Security Council. Weaponised interdependence leaves Indian businesses exposed to rules their government had no part in writing.

A world divided into rival financial and technological systems could make that dependence harder to escape. India might gain bargaining opportunities, but access to a market or technology could increasingly require accepting the conditions of one camp. A larger economy will not by itself remove that vulnerability.

The UN retains value even when its Council is paralysed. Universal membership gives smaller countries a claim to be heard without a major power's invitation. Its agencies deliver relief, document the human cost of crises and organise the scientific assessments used in climate negotiations. As climate shocks and widening inequalities strain developing countries, the UN gives them a forum to press claims on climate finance and sustainable development.

That's not enough. The UN still falls short too often. The Secretariat must simplify procedures, cut duplication and spend carefully. Governments are also weakening the organisation they invoke when convenient. They assign tasks they

do not fund, delay payments they owe, and cut assistance while expecting the UN to absorb the damage. A peace operation given an ambiguous mandate and inadequate resources is being set up to fail.

AI presents an early test of who gets to write rules that matter. The UN's independent scientific panel has warned that AI agents could become harder for humans to control. On September 23, technology executives briefed the Security Council on AI's risks. The Council has a role where AI threatens international security. Companies bring essential expertise, but also commercial interests. AI's reach into employment, education and development needs wider consideration. India should press for safety standards and access to technology to be negotiated where developing countries have a voice. Permanent members and some technology firms cannot represent everyone whose future these rules will shape.

India's influence at the UN depends on the partners it can bring to a negotiation. On September 21, India helped launch Partners for Multilateralism, or P4M, with Brazil, Canada, Kenya, the EU, Australia and Barbados. The group spans different diplomatic camps. The declaration recognises that economic interdependence is being used to exert pressure, disrupting trade, supply chains and development finance. Each partner has relationships that could help India persuade countries it might not otherwise persuade. Joint proposals on climate finance or protec-

tion against economic coercion could attract wider support. That work need not wait for agreement on the more contentious questions of UN reform.

The world's most populous democracy and a major economy, India has a compelling claim to permanent membership. Africa's exclusion from permanent membership makes the case for Council reform harder to ignore. Regional rivalries obstruct agreement on expansion. Charter amendments also require ratification by all five permanent members. An elected seat is the nearer prospect.

A practical priority for External Affairs Minister S. Jaishankar at this Assembly is to secure support for India's candidature for an elected Security Council seat for the 2028-29 term. Its opponent in the June 2027 election is Tajikistan, which has never served on the Council. A founding UN member in 1945, India has contributed more than 275,000 personnel to UN peacekeeping. Smaller countries will also want to know how India would use another term to address their concerns. India can draw on that record to argue for mandates troops can carry out, and for affected countries to be heard before the Council acts.

A Council term would give India more scope to negotiate agreements and insist that governments honour them. The test will come when an agreement obstructs the choices of powerful states. The Charter matters most when it gets in the way.

The writer is former permanent representative of India to the UN, and dean, Kaulitya School of Public Policy, Hyderabad

The UN retains value even when its Council is paralysed. Universal membership gives smaller countries a claim to be heard without a major power's invitation

Gen Z is much more than political street theatre



NEELKANT BAKSHI

THERE IS a new political fashion in India: Anyone who takes to the streets, abuses opponents, damages public property, or creates disorder is quickly presented as the authentic voice of "Gen Z". The label is then appropriated by political groups and vested interests to give their own agenda the sheen of youth rebellion. This portrayal does a profound injustice to India's young generation. The people who shout the loudest do not necessarily represent their generation. And those who destroy public property, attack institutions, hurl abuse, or turn political disagreement into violence cannot claim a monopoly over the aspirations of millions of young Indians simply because they happen to be young.

India's Gen Z is far larger, more diverse and considerably more accomplished than the political street theatre through which some of its supposed representatives are being showcased. In a democracy, peaceful protest is an important constitutional and political instrument. Young people have every right to question governments, challenge policies and demand accountability. But protest does not acquire moral legitimacy merely because the protesters are young.

Age cannot transform vandalism into democracy and turn abuse into political argument. Nor can a crowd become a representative voice for an entire generation simply because cameras happen to be pointed at it. A dangerous narrative is slowly taking shape. That India's Gen Z is inherently angry, anti-establishment, violent, contemptuous of institutions and incapable of constructive engagement. They may disagree passionately with the government of the day. They may support different political parties. They may be politically conservative, liberal, socialist, nationalist, or politically indifferent.

But political diversity is not the same thing as political disorder. This is where the "Cockroach Janta Party" phenomenon (political forces that seem determined to crawl into every available social grievance and appropriate it for partisan purposes) needs to be called out.

No political party, whether in government or opposition, owns Gen Z. No ideological group owns the youth. Neither should India's Gen Z have its identity outsourced, nor should vested interests be allowed to hijack the label of "Gen Z" and use it to portray an entire generation as

angry, anarchic or hostile to the institutions of democracy. There is a profound difference between challenging authority and rejecting responsibility.

There are those young Indians whose contribution is measured not in social-media followers or television sound bites but in courage. They are the young men and women who, in uniform who guard India's borders, serve in difficult terrain and, when required, make the ultimate sacrifice for the country. They demonstrate something that is increasingly absent from the caricature of Gen Z being constructed by sections of political activism: Responsibility.

The danger of such appropriation goes beyond politics. It distorts how India and the world understand its young population. India is one of the world's youngest major societies. India's young people are not merely a demographic statistic; they are an enormous productive, creative and strategic resource. If the image of Indian youth is reduced to angry crowds breaking things, abusing people and confronting the police, the country does itself a disservice. More importantly, millions of young Indians who quietly work, achieve and contribute are rendered invisible.

India needs young citizens who question authority, but who also understand responsibility. It needs young people who demand change, but who know that change requires institution-building. It needs young Indians who are fearless enough to criticise power, but disciplined enough not to destroy what belongs to the public. It needs disagreement without dehumanisation, protest without violence and political activism without the abandonment of basic civic responsibility.

The real Gen Z story of India is not being written exclusively on the streets. They do not need to hurl abuses to demonstrate courage. They do not need to vandalise public property to demonstrate anger. They do not need political parties to certify their relevance. Their work speaks for itself. The real Gen Z of India is not a mob. It is a generation building, competing, innovating, serving, and achieving. And that Gen Z is far too large, and far too consequential, to be represented by those whose only claim to represent it is that they know how to make the most noise.

The writer is former media relations head, Delhi BJP

IIT-Bombay suicide case: In search of a perpetrator



ROHAN MANOJ

SOME DISCUSSIONS on the death of Sahil Wakode, a student at IIT-Bombay, have linked it to the ongoing national conversation about student suicides, highlighting issues such as academic pressure, disciplinary processes, teacher-student relationships and mental health support on campus. Yet there is perhaps too little emphasis on what may turn out to be the key factor in this case: The allegations of caste-based harassment, which have led to the police involvement and alongside the offences of student suicide. The entire issue really hinges on one question: Was a crime committed? If not, this could be one more tragic episode in that broader conversation about suicides. But if so, the focus needs to shift to casteism at elite institutes. That discussion is already happening, acrimoniously, at several institutes and on social media.

If a crime was committed, who did it? Wakode's father has made allegations not just against Suranarayana Doolia, the professor involved in the incident in the exam hall, but also the institute's director, Shreshth Kedar. And if a crime was committed, over what period of time did it take place? The parents have spoken of harassment that had been going on for around three months, not just the incident in the exam hall on the day of their son's death. There is little detail in the public domain so far about these allegations, only rumours, supposed leaks and commentary. The claim that the student cheated in an exam is just that — a claim. In any case, it does nothing to disprove the allegation of ongoing harassment. The prudent approach would be to wait for more facts to be established and for the police to complete their probe. At this stage, the most important thing to emphasise is the need for a fair and thorough investigation.

Three aspects of the discourse emerging around this incident deserve special attention. One, this has turned into a STEM-versus-humanities conflict due to the involvement of humanities students in the protests. The very need to teach the humanities at a technical institute is being questioned in a puerile manner. There could be no better argument for the necessity of ensuring all students get a strong grounding in social and political thought. Two, the anxiety of the meritocrats. The concerns raised by some who have rallied in support of the professor — that he is being scapegoated even though he simply did his job and followed the prescribed process — are remarkably similar to the fears over the now-stayed UGC Equity Regulations, as well as the old anxieties around the "misuse" of the SC/ST Act. In this case, there are two problems. First, the facts of the "cheating" incident have yet to be established; it is not known if the proper process was followed. Second, by confining their indignation to that one incident, they sidestep the allegation of ongoing harassment.

Finally, there is the question of the perpetrator. Previously, in the context of OBCs, I have written about the need for a reframing — from "backward" to "oppressed". One thing is that it acknowledges the existence of perpetrators; "oppression" is always carried out by an "oppressor". If this case is truly about lack of mental-health support or institutional lacunae in some broad sense, then there is no perpetrator. One may lament and call on the administration to do better, but everyone is responsible and therefore no one is accountable. Crime, on the other hand, is done by criminals, casted by casteists. The investigation will, hopefully, establish which is the case here.

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If not, this could be one more tragic episode in the broader conversation about student suicides. But if so, the focus needs to shift to casteism at elite institutes

40 YEARS AGO

September 26, 1986



CPI leader, cop shot dead

IN A spurt of terrorist activity, Communist Party of India (CPI) national council member Darshan Singh "Canadian" and a Punjab police head constable were shot dead even as military forces nabbed four extremists and recovered arms and ammunition from them in the past 24 hours in Punjab. Darshan Singh, three-time CPI legislator in Punjab and former secretary of the state unit of the CPI, was gunned down by two extremists while he was going on a cycle from Mahalpur to his native village Langeri in Hoshiarpur district.

Chinese intrusion confirmed

ARUNACHAL PRADESH Chief Minister Gegong Apang said the exact area occupied by the Chinese in Tawang district could not be ascertained so far but confirmed they had intruded into the Wangtung and Thundrong areas. He told the Assembly that defence forces in Tawang had been strengthened.

Ruling on suicide attempts

THE BOMBAY High Court held Section 309 of the IPC, which penalises an attempt to com-

mit suicide, to be ultra vires of the Constitution. Justice P B Sawant and Justice B G Kolse Patil gave this ruling on a writ petition filed by Sulochana, wife of a mentally ill police constable, Maruti Shripati Dubal, who was being prosecuted before a metropolitan magistrate on a charge of attempt to commit suicide.

Price of wheat

THE COMMISSION for Agricultural Costs and Prices is understood to have recommended Rs 165 per quintal as the government price of wheat for the 1987-88 rabi marketing season.

The Ideas Page

The election umpire's independence begins with its appointment



FAIZAN MUSTAFA
AND MADHAV ANAND

NEUTRALITY is not an ornament of the Election Commission. It is the constitutional reason for its being. In *Justice Krishna Iyer*, echoing Lord Camden, cautioned that "wide discretion is fraught with tyrannical potential even in high personages, absent legal norms and institutional checks". In the Constituent Assembly, Shibban Lal Saksena spoke of the possibility of the Election Commissioner being "a knave or a person who is likely to be under the thumb of the executive". In response to this criticism, B.R. Ambedkar, through Article 324(2) made appointments to the EC "subject to the provisions of any law made in that behalf by Parliament".

For seven decades, however, Parliament did not make that law. In *Anoop Baranwal* (2023), a Constitution Bench prescribed an interim arrangement comprising the Prime Minister, the Leader of the Opposition and the Chief Justice of India. With good speed and much like it had acted in the Shah Bano case, Parliament filled the legislative vacuum through the Chief Election Commissioner and other Election Commissioners (Appointment, Conditions of Service and Term of Office) Act, 2023, and replaced the CJ with a cabinet minister nominated by the PM.

On Wednesday, a two-judge bench of the Supreme Court referred petitions challenging the 2023 law to the CJ for constituting a Constitution Bench due to disagreement between the two judges, Justice Dipankar Datta and Justice Satish Chandra Sharma.

In Justice Datta's words, the Narendra Modi government's plan to refer the issue to a Constitution Bench emerged "in gradual course of his (the Attorney General's) arguments". The plea found no place in the counter affidavit and came two years into the litigation. Justice Datta rejected it, while Jus-

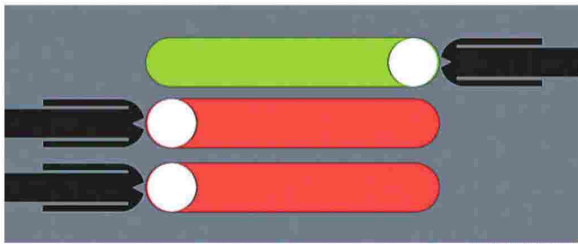


ILLUSTRATION: CR SAKSHI

tice Sharma accepted it. Interestingly, in the *Aligarh Muslim University* judgment (2024), both the judges had found the referral to a Constitution Bench by a two-judge bench in a 1981 verdict problematic.

Justice Datta's opinion rightly rests on an elementary and decisive distinction: Application of law is not interpretation. In *Thakur Ganga Singh* (1960), the Court held that a question of interpretation arises only when competing constructions of a provision are canvassed. Parliament answered the disclosure judgment in *Association for Democratic Reforms* (2002) with Section 33B of the Representation of the People Act. In *FUCI* (2003), a three-judge bench struck down and called the demand for a reference "totally misconceived". A parliamentary overruling of judgment does not, by itself, make the constitutional question new. Where the governing principle has already been conclusively established, the remaining task is simply to apply it to the facts of the case.

What, then, did *Anoop Baranwal* settle? The bench held that "a person who is in a state of obligation or feels indebted to the one who appointed him, fails the nation", that one "weak-kneed before the powers that be" cannot be an Election Commissioner, and that an appointment "must not be overshadowed by even a perception" that "a yes man will decide the fate of democracy".

Justice Datta distilled this into a binding declaration of the EC's independence — the appoint-

ment process must be free of exclusive executive control. That standard, he held, "is binding on all courts". What is not binding is the machinery the bench devised to meet it. The CJ's inclusion was "a deliberate signalling advice, and not a mandate". Demonstrating judicial reasoning at its best, Justice Datta distinguished the principle, which binds, from the prescription, which Parliament was free to change.

The principle is that appointments must be insulated from exclusive executive control

ment process must be free of exclusive executive control. That standard, he held, "is binding on all courts". What is not binding is the machinery the bench devised to meet it. The CJ's inclusion was "a deliberate signalling advice, and not a mandate". Demonstrating judicial reasoning at its best, Justice Datta distinguished the principle, which binds, from the prescription, which Parliament was free to change. The principle is that appointments must be insulated from exclusive executive control, and that "it is not enough for the EC to be independent". Justice may not be done but it should at least appear to have been done.

When the bench asked whether the PM's nominee would ever oppose him in case of a difference of opinion between the PM and the Leader of the Opposition, the Attorney General's answer was, "probably no". The petitioners were more emphatic, saying, "certainly no".

Whether the selection committee meets that constitutional principle is a question of application. It cannot become a question of interpretation merely by "repackaging an existing constitutional principle in a seemingly new factual or legislative setting", Justice Datta held.

Though Justice Sharma demonstrated judicial humility, the difficulty lies in his reasoning. He accepts that the *Anoop Baranwal* committee was an "ad hoc arrangement". He acknowledges

that free and fair elections are part of the Basic Structure, which "no court can or would, possibly, doubt". He also accepts that "to the extent law has been declared under Article 141, it is 'to be applied'". He then describes what remains: "Whether the said Act fails the test of free and fair elections has to be independently examined". To examine whether a statute fails a settled test is the very definition of application.

Justice Sharma notes that the question of whether Parliament, "was justified in not including a neutral selector" is "an important question arising for the first time before this Court". However, this sentence cannot bear that weight because the neutral selector was the very reasoning of *Anoop Baranwal*, which included the CJ "as a neutral arbiter".

Justice Sharma did not find the Solicitor General's reliance on *NIAAC* (2015) problematic. If the Law Minister's presence in the committee to appoint judges offended the judiciary's independence, his argument ran, "a corresponding degree of constitutional independence" must be recognised for the executive. Justice Sharma accepted the analogy as a "constitutional principle". However, the SG's argument turns *NIAAC* on its head. *NIAAC* shielded an independent institution from the executive; the SG's analogy invokes it to shield the executive's hold over another independent institution. Article 324 — which gives the EC constitutional status — protects the independence of the umpire, not the players. And the executive, as Justice Datta courageously notes, is itself "a participant in the electoral process".

Since the two judges could not agree on upholding the law, they should have read it down by requiring the selection committee to make its decisions unanimously. Such a requirement, in our opinion, would ensure that an Election Commissioner could be appointed only with the agreement of both the government and the Opposition, providing a stronger assurance of the appointee's independence and credibility.

To err is human. A democracy can survive an umpire's wrong call, but it cannot survive the suspicion that the umpire was deliberately chosen to make it.

Mustafa is vice-chancellor, Chanakya National Law University, Patna. Anand is scholar at NUJS, Kolkata. Views are personal

Post-World War II norms cannot fix today's problems



RAM RAJYA
BY RAM MADHAV

IN AN interview to the media while in Delhi to attend the BRICS summit earlier this month, António Guterres, the UN Secretary-General, made some startling admissions about the multilateral organisation he heads. "As the superpowers are divided, the Security Council is paralysed. There is no way to put order in the world," he confessed, adding that the Council "does not correspond anymore to the world of today. It creates a problem of legitimacy, and it creates a problem of effectiveness," he confessed. Guterres described the "need to readjust the power systems and mechanisms of governance in the world to the reality of today's world instead of the reality of 1945" as a "hard battle" and insisted that what the UN needs is not a simple reform but "an overhaul".

These were extraordinary confessions. Last year, at the 80th UN General Assembly session, Guterres was combative, describing the UN as "a moral compass, a force for peace... a guardian of international law". His statements in Delhi a year later were not just the frustrated farewell sentiments of an official demitting office at the end of this year, but the dawning of the reality that the system created after World War II was no longer working. No better illustration of this reality is required than the fact that Chinese President Xi Jinping has travelled to the White House in Washington, DC, but wasn't at the prestigious annual congregation of world leaders.

China pundits interpret it as Xi's way of presenting his country as an equal to the US by spending exactly as much time in the US as President Donald Trump did in May this year during his visit to Beijing. But the fact that Xi found spending time in DC more useful for his country than a visit to the UN's 81st session. Many other prominent world leaders chose to stay away from the session this year. They included German Chancellor Friedrich Merz, Italy's prime minister Giorgia Meloni, South African President Cyril Ramaphosa, Egyptian President Abdel Fattah el-Sisi, Russian President Vladimir Putin, Indonesian president Prabowo Subianto and several others. Indian Prime Minister Narendra Modi, too, did not attend for the second successive year.

None of these leaders is against global multilateralism. But they all feel that the current structure is unsuitable for the present times. Modi said so two years ago, cautioning the 79th UNGA session in 2024 that the global institutions were losing relevance, adding that "reform is key to relevance". S Jaishankar, India's External Affairs Minister, was more forthright at the 80th session last year, pointedly asking if the UN had "lived up to expectations".

Trump, who opened the session on September 22, also came down heavily on various UN bodies like the International Criminal Court and UNESCO. "There is no global government," he insisted, and warned that the UN must "stop imposing the far-left agenda of globalist bureaucrats who nobody ever elected". The US's lack of faith in multilateralism became clear when Secretary of State Marco Rubio said on the sidelines of the UNGA that the current international system is unable to deliver. The US, "at least as long as President Trump is in office", will always act in its own interest, "not in the interest of the international order", he declared, categorically stating that "We will never put the international order above the interests of the US".

Reform at the UN is long overdue. But the problem is that, as pointed out by Jaishankar last year, the process for reform itself is an obstacle. John Bolton, former US Secretary of State, said in 2018 that any move to amend the UN Charter itself would face a veto roadblock. That brings us back to the outgoing Secretary-General's comment: Not reform, but overhaul.

In the middle of World War II, when the League of Nations had completely become dysfunctional, two Western leaders, Franklin D Roosevelt of the US and Winston Churchill of Great Britain, came together to proclaim the Atlantic Charter in 1941. That served as the foundational document for the creation of a new multilateralism under the UN four years later. At a time when West-dominated system is faltering, we need the statesmen from the Global South to come forward to build a new system — an Indo-Pacific Charter — the basis for which should be the recognition of multipolarity.

The writer is national vice-president, BJP and president, India Foundation

LETTERS TO THE EDITOR

Guarding the guards

THE LATEST revelations ("14 times in 10 months, two Election Commissioners objected to poll panel steps", *IE*, September 23) relating to serious differences within the EC raise an even more fundamental question: Who will hold the Election Commission accountable when the institution entrusted with protecting the integrity of elections itself faces allegations of opaque and partisan functioning? The reported objections raised by Election Commissioners Sukhbir Singh Sandhu and Vivek Joshi over the past 10 months concerning electoral-roll management, voter registration, deletion and restoration of names, and electoral data are deeply disturbing. Reports that some decisions were allegedly taken without their knowledge require a transparent explanation.

Tharicus S Fernando, Chennai

Everyday fairfare

THE HORRIFIC gang rape of a 17-year-old girl in a South Delhi park lays bare how casual and reactive the system remains when it comes to the safety and protection of women (Don't ask women to shrink, secure their space, *IE*, September 25). Furthermore, this security failure extends beyond isolated crimes to the everyday decay of public spaces.

Krishan Kumar Clugh, New Delhi

Trump address

THE RECENT address by US President Donald Trump at the United Nations raises important questions about the future of international diplomacy ("In Trump's annihilation threat, a tiny space", *IE*, September 25). His strong emphasis on American power, along with threats against Iran, risks weakening the spirit of cooperation that the UN was created to protect. However, the talks between US and Iranian officials show that diplomacy still has a valuable place. Dialogue, rather than threats, offers a better path to resolving conflicts and preventing further instability.

Ansh Dubey, Delhi



SHWETA SAINI
AND VANSH OBEROI

INDIA is not short of wheat. The question is whether it knows enough about the crop it will harvest six months from now to export freely today.

On August 24, wheat exports moved from "prohibited" to "free", following calibrated permissions of 2.5 MMT each in February and April. The balance sheet looks comfortable. Production is officially estimated at 1207 MMT, though trade estimates are closer to 110 MMT. Procurement reached 35.76 MMT, against about 30 MMT last year. Central Pool wheat stocks stood at nearly 48 MMT on September 1, more than twice the October 1 buffer norm of 20.5 MMT. But a buffer surplus is not an export surplus. Today's abundance comes from a crop already harvested. The crop that must replenish these stocks will be sown over the next two months, and there are reasons for caution.

The monsoon is about 15 per cent below normal, and the risk is uneven. Punjab and Haryana face large rainfall deficits, but their heavily irrigated wheat can lean on groundwater, at a cost to aquifers and state power subsidies. Rajasthan is more exposed: Rainfall is about 25 per cent below normal and reservoir storage about 31 per cent below. Bihar has received around 35 per cent less rain, raising concerns over pre-sowing moisture and groundwater recharge. Madhya Pradesh and Uttar Pradesh are better placed for now.

The crop that must replenish these stocks will be sown over the next two months, and there are reasons for caution

Don't export tomorrow's wheat surplus today

The outlook adds to the risk. NOAA's September 14 update keeps El Niño in place through January-March 2027. The International Research Institute for Climate and Society sees higher chances of below-normal rain and above-normal temperatures over parts of India through March. A warmer winter is effectively a shorter one, and March matters most — an early temperature rise during grain filling cuts yields. This is not a forecast of crop failure. But parts of the wheat belt enter rabi with a thinner water cushion, and the heat risk is very much alive.

Nor can wheat be viewed apart from rice. Rice prices are already 7-8 per cent above a year ago, and kharif acreage is nearly 17 lakh hectares lower. Rabi and summer rice may recover some of this, but weak reservoirs and an unfavourable weather outlook could limit that. India's cereal basket therefore has less room to absorb a wheat shock than headline stocks suggest.

The incentive to export is real. Black Sea wheat lands at Chittagong for about \$380/mt, against roughly \$330/mt for Indian wheat (based on \$27/kg in Madhya Pradesh). Forward markets point firm too. May 2027 Chicago wheat is around \$275/mt and Kansas HRW near \$300/mt, both about 15 per cent above May 2026 levels. With Black Sea disruptions persisting, futures are not signalling cheap wheat by the time India's next crop arrives.

India has seen how quickly

such calculations change. In February 2022, Indian wheat production was estimated at a record 110.13 MMT. With the Russian-Ukraine war disrupting global supplies, India stepped up exports and targeted 10 MMT for 2022-23. Then came the unusually hot March. As late as May 12, the government was announcing trade delegations to promote wheat exports. A day later, exports were prohibited. On May 19, the production estimate was cut to 106.4 MMT.

Sugar offered a reminder just last month. On expectations of comfortable availability, the government expanded sugar exports in February. Production subsequently disappointed. By August, policy had moved from permitting additional exports to allowing duty-free raw sugar imports.

Such swings carry another cost. Opening exports fully and then shutting them abruptly erodes India's reliability as a supplier. The answer is not to halt agricultural exports whenever forecasts are uncertain, but to retain room to respond.

India can keep a calibrated wheat export window and revisit it as information improves. If the crop is excellent, India can always export more. Wheat shipped today cannot be recalled if the harvest disappoints.

India has enough wheat now. What it lacks is enough information about its next crop. That is a reason to preserve optionality, not surrender it.

The writers are with Arcus Policy Research

I don't want to be cautious. I want to live free of fear



NAVYA JAIN

I was just 18, three months into college, when I was flashed for the first time by a middle-aged man. I was on a busy road that leads from my PG to the college. What stayed with me after was not the absolute horror and disgust that I felt in that moment but how ordinary it was. When I mentioned the incident to other girls, every one had their own story.

Ever since, I do mental math before I go out. Can I go on the route alone? Booking an auto is better than booking a cab. Is too late or too early? Is the road too empty? In the scorching Delhi heat, it has become my habit to think twice before wearing shorts, skirts and tank tops while stepping out. Nobody ever taught me to do this. I just learnt to carry shirts, scarves and cover-ups, like the way you learn a language. By living in it.

This week, when the news about a minor's gang rape in Aastha Kunj Park (only 2 km from Lady Shri Ram College) near the college's back gate broke out, the arithmetic got louder in my head.

The cruel part is that ILSR is where I have not had to stay alert. It's a place where the shirts and scarves come off, we dress as we like, girls exult loudly, stay late without explaining themselves and take up room without apology. It is a space that taught me how to be unguarded. A man accused of rape was found barely 50 m from that very place's

What I want is a city that makes a girl's walk to her lecture something she doesn't have to mentally prepare for

back gate, tainting that tiny island of freedom by proximity. That wasn't just a security lapse; it was a disrespect to everything that place stands for.

On Wednesday, when hundreds of girls from LSR and other DU colleges filed the road outside our gate, they came for every woman who has been raped, and for every woman who lives in the constant fear that she might be next. We shouted slogans on a road where I usually walk with my guard up, and for once, it felt like it was ours. It felt like reclaiming space. It felt like we were worthy of our own institution, which has a reputation for standing with women — it was where the Pnirja TD campaign took off, where they refused to accept curfews as the price of being safe.

But solidarity cannot be all we have. I do not want pepper spray in my bag. What I

want are streetlights that work, police who patrol before, not after, a crime, media that states facts correctly, and a city that makes a girl's walk to her lecture something she doesn't have to mentally prepare for.

The question was never how women should stay safe because that has been answered a thousand times, in parents' warnings and PG rules and shopping lists. The question is why a whole society has left that answer to us.

I will carry the spray tomorrow, because I have to. But I have stopped believing this is what safety means. Safety is not a girl who is cautious about everything; it is a place where she never has to be cautious about everything, ever again.

The writer is a student at Lady Shri Ram College, University of Delhi

REVENUE DEPENDENCE ON DERIVATIVES CUT, SAYS CHAIRMAN

Focus on investor protection, revenue diversification: NSE

SEBI should allow exchanges to list on their own platforms, said Srinivas Injeti

Akash Mandal
Mumbai, September 25

THE PRIMARY duty of the National Stock Exchange (NSE) is to ensure a safe and trusted market for investors even if it comes at the cost of business for the exchange, Chairman Srinivas Injeti said here on Friday, amid the ongoing tightening of regulations in derivatives markets which has been a "cash cow" for both the bourse operators, NSE and BSE.

"We can't be distracted from our primary duty of giving you a market with integrity and a market where investors are protected," Injeti said during a media briefing here, a day after NSE's listing.

MD and CEO Ashish Kumar Chauhan and other senior management of the bourse operator were also present.

On regulatory tightening in the derivatives segment, Injeti said, "This imbalance, excessive dependence (on the derivatives segment), you know, will have to be reduced. So, I think that is the big picture. And given this, there is no way, there is no haggling, there is no way in which quarter to quarter you can do some magic."

Before this tightening, NSE and BSE were deriving over 90% of their revenues from the derivatives segment at one point.

Diversifying revenue streams

NSE's management emphasised the need to take steps to better protect retail investors and diversify its revenue streams going forward.



NSE and BSE were deriving over 90% of their revenues from the derivatives segment at one point. @SENDA/X

"Maybe if this domination in options was unquestioned, they (SEBI) may not have looked at the commodity. They may not have looked at... what are the small, small things we can do to sort of get data consistency, some money here, some money there, some data modernisation. All that is happening because of this imbalance, excessive dependence (on revenues from derivatives), you know, will have to be reduced," Injeti added.

A study by the Securities and Exchange Board of India (SEBI) last month showed that despite signs of retail participation in India's equity derivatives (F&O) cooling for the first time in at least five years, nearly 9 in 10 individual traders continued to face losses in 2025-26, as the average loss per trader rose 2% year-on-year to Rs 1.17 lakh crore. This was despite steps taken by the regulator such as limiting expiries to one per exchange and increasing lot sizes of derivative contracts, among others.

NSE has considerably reduced its revenue dependence on derivatives, and aims to continue doing so through more focus on the cash market, electronic gold receipts, and the commodity market, among others.

In fact, SEBI on Thursday permitted foreign investors to take part in physically settled non-agricultural commodity derivatives, a move expected to boost trading volumes in bullion contracts. This will also bring in significant capital for NSE, whose facilities have been used by FPIs for decades to invest in equities, the management said.

Time to reconsider self-listing norms

The NSE chairman also said that the SEBI should allow exchanges to list on their own platforms as the Indian market has matured.

While self-listing is permitted across various major markets, like in the US, the Indian market regulator continues to prohibit it, citing conflict of interest concerns.

"Prior to 2012, even listing was not allowed. A stock exchange or an MNC could not list. In 2012, it was allowed," Injeti said, adding that there is merit in aligning the Indian norms with global standards.

Similar concerns have also been raised by foreign investors, it added. NSE's shares listed on the BSE on Thursday at a premium of around 17%. The management said it had not yet approached SEBI for approval regarding its shares trading on its own platform through the "permitted-to-trade" route without listing.

NEW MODEL BILATERAL INVESTMENT TREATY WITH CABINET, APPROVAL CLOSE

'4-5 BIT' pacts to be finalised soon'

Siddharth Upasani
New Delhi, September 25

THE MINISTRY of Finance has finished reviewing the model Bilateral Investment Treaty (BIT) and has sent it to the Cabinet Secretariat, a senior government official said, adding that pacts with 4-5 countries, including Canada, are expected to be finalised soon under the new framework.

"We should soon finalise 4-5 BITs. We have expedited them. These will be as per the new model framework, which is waiting to be approved," the official said on the condition of anonymity.

A statement issued late last month after the Inaugural Canada-India Finance Ministers' Economic and Financial Dialogue, attended by Finance Minister Nirmala Sitharaman, said that "India expressed its readiness to initiate negotiations on a Bilateral Investment Treaty at the earliest".

The Union Budget for 2025-26 had announced a review of the 2016 model BIT to make it more investor-friendly and attract sustained foreign investment. While the aforementioned official said 20-25 BITs were signed on the basis of this model, "we have moved far away from it" in recent years when agreements were inked with the United Arab Emirates, among others.

"The new model BIT will absorb those agreements where we had moved far away from the 2016 model," the source added.

While critics have called for the five-year local remedy period to be reduced to one year or even done away with entirely, the government has stood its ground and said that

COURSE CORRECTION

A BIT is an agreement between two countries which spells out rules governing private investment in either nation from companies in the other. They help promote, protect, and provide clarity to foreign investments.

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While critics have called for the five-year local remedy period to be reduced to one year or even done away with entirely, the government has stood its ground and said that

it is important that the local judiciary is not ignored.

"People may have complained about India's judiciary from time to time. But it has stood the test of time," the official said, adding that "some red lines will not be crossed".

To be sure, the government has shown a willingness to reduce the length of time for which local remedy must be pursued before international arbitration is sought. For instance, the BIT signed with the UAE in 2024 mandated local remedies to be pursued for three years, lower than the five years in the 2016 model BIT.

A BIT is an agreement between two countries which spells out the rules governing private investment in either nation from companies in the other. As such, they help promote, protect, and provide clarity to foreign investments.

This would be especially beneficial at a time when India is struggling to attract money from abroad due to structural shifts globally: net Foreign Direct Investment (FDI) inflows in the first six months of 2026 have been \$12 billion. While this is up from \$3.1 billion in

2025 and \$2.9 billion in 2024, it is far below \$35 billion in 2022 and \$53 billion in 2020.

A model BIT creates a standard template that can be followed whenever such agreements are being pursued with other countries. The model text is used as a guide and the final agreement between two countries depends on the negotiations that take place.

At present, the Indian government follows the BIT model approved in December 2015 and adopted in January 2016. However, that model has come under fire from various quarters, particularly because it mandated that domestic legal processes be pursued for five years to resolve disputes before international arbitration is sought.

This clause, which did not exist prior to the 2016 model BIT, is seen as a hurdle for foreign investors.

Another red line is set to be the exclusion of any tax-related provisions from the model BIT.

"Tax will not go into the model BIT. It's our sovereign right to tax, and that can't be open to arbitration."

Indian economy resilient despite headwinds, says RBI Bulletin

Mumbai: India's financial and external sectors continue to draw strength from a resilient domestic economy, though escalating geopolitical tensions and weather-related uncertainties remain key downside risks, RBI Bulletin said on Friday.

The escalation of conflict in West Asia in September has led to a sharp increase in crude oil prices, reigniting concerns of further disruption in global supply chains and build-up of inflationary pressures, said the bulletin in 'State of the Economy' published in the latest Bulletin.

Besides, the rise in sovereign yields in some of the major advanced economies has put pressure on government finances. Despite the challenging global environment, the Indian economy recorded a strong GDP growth in Q1-2026-27, the article said.

"India's financial and external sectors are drawing strength from the real economy, although geopolitical tensions and weather-related uncertainties are acting as key downside risks," it said. PTI

France's EDF pushes for its nuclear reactor tech in India

Pratyush Deep
New Delhi, September 25

SENIOR OFFICIALS of the Ministry of Power on Friday held a meeting with French government-owned energy major Electricite de France (EDF) on the proposed deployment of European Pressurised Reactors (EPRs) in India, which has recently opened up its tightly-regulated civil nuclear sector for private players.

The opening up of the nuclear sector has renewed interest among global nuclear majors — including those from France, the US and Russia — in India's nuclear power programme. The government is now moving towards finalising the rules and regulations under the SHANTI Act.

France, a global leader in nuclear reactor technology, has shared close and trusted ties with India for several decades, including in the strategic and civil nuclear sectors. "The discussions centred on the deployment of EPR technology, India's regulatory reforms for the nuclear sector, cooperation on pumped hydro storage projects, and the way forward for robust, mutually beneficial partnership," the power ministry said in a statement. The meeting assumes significance as the Department of Atomic

What French energy major EDF said

• **Electricite de France (EDF)** briefed Indian officials on its efforts to develop an ecosystem and supply chain in India to enable large-scale localisation

• **The French company** reiterated that a sizeable programme involving multiple nuclear reactors would provide suppliers with confidence and enable economies of scale by leveraging the capabilities of Indian industry



Energy (DAE) last month issued the draft rules and regulations of SHANTI Act, laying out the regulatory framework for a wider nuclear power ecosystem, including private participation, captive nuclear generation, foreign reactor technology, licensing, safety oversight and nuclear liability.

Pankaj Agarwal, secretary at the Ministry of External Affairs, Central Electricity Authority (CEA), NTPC Limited and NPCIL on the Indian side, and by officials of EDF and the Embassy of France in India on the French side attended the meeting. According to the power ministry, EDF briefed Indian officials on its efforts to develop an ecosystem and supply chain in India to enable large-scale localisation.

The French company reiterated that a sizeable programme involving multiple nuclear reactors would provide suppliers with confidence and enable economies of scale by leveraging the capabilities of Indian industry. Agarwal briefed the French side on the progress in finalising India's regulatory framework for the nuclear power sector, including the draft SHANTI (Sustainable Harnessing and Advancement of Nuclear Energy for Transforming India) Rules and Regulations, which were recently placed in the public domain by the DAE for stakeholder consultation.

FULL REPORT ON WWW.INDIANEXPRESS.COM

India key to Suzuki plans for next 10 yrs

ENS Economic Bureau
New Delhi, September 25

SUZUKI MOTOR Corporation will halve the time taken to develop new vehicles by 2030 and deepen its focus on India as a manufacturing and export hub as part of a new technology strategy aimed at responding faster to changing customer needs and market conditions.

Under its "Technology Strategy 2026 for 10 Years Ahead", Suzuki will target a 50% reduction in new-model development lead time, alongside a 30% improvement in development efficiency and a 50% improvement in manufacturing efficiency by 2030.

The company plans to achieve this by changing the way vehicles are developed, moving away from a sequential process towards concurrent development, in which planning, design, production, quality and

procurement are brought together from the beginning.

Suzuki will also increase its use of digital engineering and modularisation. India will have a larger role in this global strategy.

Suzuki plans to strengthen the country as a manufacturing and export hub, targeting annual production capacity of around four million units by 2030.

FULL REPORT ON WWW.INDIANEXPRESS.COM

BRIEFLY

Centre to borrow Rs 7.86 lakh cr in October-March

New Delhi: The Union government will raise Rs 7.86 lakh crore from securities in the second half of this fiscal year, reducing the total borrowing for the current financial year by Rs 1.2 lakh crore despite global headwinds. The reduction in total borrowing indicates the government's commitment to fiscal prudence. A senior finance ministry official said the reduction is mainly due to switching of securities maturing in 2026-27 of Rs 1.14 lakh crore. A conscious debt-management strategy of the government, PTI

Airbus detects coating issue in A321 neo planes

New Delhi: Airbus has detected a quality issue with the surface protection coating on the fuselage of a significant number of narrow-body A321 neo planes and around a dozen of such aircraft operated by IndiGo are also impacted, according to sources. IndiGo and Air India operate A321 neo aircraft. Together, they have around 190 such planes. An Airbus spokesperson on Friday said during some standard work surface protection deviation on strings located at the lower front section of the fuselage was identified affecting a number of A321 aircraft. PTI

Forex reserves fall \$14.89 billion to \$766 billion

New Delhi: India's forex reserves dropped by \$14.89 billion to \$765.9 billion during the week ended September 18 due to a fall in foreign currency assets, according to the RBI data. In the previous reporting week, forex reserves had fallen by \$4.92 billion to \$780.78 billion. For the week ended September 18, foreign currency assets, a major component of reserves, fell by \$14.86 billion to \$630.98 billion, as per the RBI data. PTI

Govt appoints Subramanian, Pant to IRDAI

Mumbai: The government has appointed LIC Managing Director Dinesh Pant and former NIA Insurance Company chairman-cum-managing director (CMD) Gijrja Subramanian as members of the Insurance Regulatory and Development Authority of India (IRDAI). Pant will join the insurance regulator as Member (Actuary), while Subramanian has been appointed as Whole-Time Member (Distribution). ENS

MARKETS

SENSEX	NIFTY	GOLD	US DOLLAR
73,895.74	23,140.50	\$1,52,113	\$95.82
315.20	77.40	SILVER	OIL
0.43%	0.34%	\$2,32,350	\$123.67

NOTE: GOLD, SILVER RATES AS PER INDIA BULLION AND JEWELLERS ASSOCIATION DATA. GOLD PER 10G, SILVER PER 1G. CRUDE OIL (BUNIAN BASKET) AS OF SEPTEMBER 24, 2026

• HIGH-SPEED CORRIDORS ARE SPECIAL SECTIONS OF NATIONAL HIGHWAYS WHICH PROVIDE UNINTERRUPTED, END-TO-END TRAVEL

India's 50,000-km high-speed road plan: What new highway design rules say

Dheeraj Mishra
New Delhi, September 25

TO ENSURE uniformity and consistency in the construction of high-speed corridors, also known as access-controlled national highways or expressways, the National Highways Authority of India (NHAI) has issued detailed guidelines covering the design, standards and specifications for such projects. Until now, consultants have been preparing detailed project reports (DPRs) for these corridors based on varying standards and specifications.

The move assumes significance as India targets 50,000 km of high-speed corridors by

2036-37 under Vision 2047. These corridors are special sections of national highways which provide uninterrupted, end-to-end travel. The total length of high-speed corridors by December 2025 stood at 3,052 km. The highway authority has mandated that a traffic assessment of these projects should include existing, generated, induced, as well as diverted traffic based on proper traffic modelling.

"Freight growth rate shall be duly analysed considering economic development. The traffic shall be validated from other secondary sources such as toll transactions. For freight

traffic and determination of VDF (vehicle damage factor), data from GST portals, mining departments and other sources shall be used to validate it," it said.

It said that when the present traffic is up to 15,000 PCU (passenger car unit), the corridor should be developed as a four-lane highway with a four-lane structure. If the traffic is between 15,000 to 25,000 PCU, the corridor should be developed as a six-lane highway with six-lane structures, and if the traffic is 25,000-40,000 PCU, then it should be a six-lane highway with six-lane structures.

"Access should be planned with the objective that the long

NEW DESIGN GUIDELINES

15,000 PCU	15,000-25,000 PCU	25,000-40,000 PCU
Corridor should be developed as a 4-lane highway with 4-lane structure	Corridor should be developed as a 4-lane highway with 4-lane structures	Corridor should be developed as a 6-lane highway with 6-lane structures



distance through traffic can operate at speed dictated by the flow on the main highway and

not by any other factors such as interference from local traffic, access traffic or cross traffic.

There shall be no at-grade intersection of any road with the project highway. Access to the project highway shall be through properly designed ramps at pedestrian locations," said the NHAI.

It mandated that in areas characterised by frequent operation of heavy agriculture machinery, specifically harvesters and tractors with high laden farm produce, the height of overpasses may be considered at 4.50 metres. The service road shall be provided in built-up and urban sections on both sides with drain cum footpath, said the authority.

Regarding road signage and markings, NHAI said full over-

head gantries carrying direction signs shall be placed 5 km and 2 km ahead of an exit, while cantilever gantries carrying advance direction signs shall be placed 1 km and 500 metres before the exit. The authority also mandated that lane and other markings be 150 mm wide, while edge-lane markings be 200 mm wide.

Barrier-less tolling, corridor protection

Since NHAI is already shifting towards a multi-lane free flow (MLFF), or barrier-less tolling system, it has also asked for provisions for the system to be incorporated into the layout of high-speed corridors.

"In order to prevent encroachment and unauthorized access on high-speed corridors, a meter high RC (reinforced concrete) boundary wall shall be constructed along the extreme outer edge of the ROW (right of way)," said the NHAI.

ROW, or right of way, refers to the total width of land legally acquired or owned by the government or road authority for construction, operation, maintenance, and future highway expansion.

The authority also said that drip irrigation will be provided in the median for watering of plants and tree plantation will be made an integral part of the project design at the DPR stage.

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

• GEOPOLITICS

How Taiwan looms large in US-China ties



EXPERT EXPLAINS

LYLE MORRIS

SENIOR FELLOW AT ASIA SOCIETY POLICY INSTITUTE'S CENTER FOR CHINA ANALYSIS

DURING CHINESE President Xi Jinping's visit to the US, issues such as tariffs and AI regulation were on the agenda. But for China, the most significant concern, perhaps, is US policy on Taiwan. Xi said in Washington, DC, that "China hopes the US side will adhere to the correct position of opposing 'Taiwan independence', so as to lay a solid foundation for China-US strategic cooperation."

China has made increasingly assertive historical claims to Taiwan, even as Taiwanese political leaders refer to themselves as functioning independently. How does it add to the complexities of US-China ties? **Lyle Morris**, of the US-based Asia Society Policy Institute, who also served in the Office of the US Secretary of Defense as Country Director for China, spoke to **Rishika Singh**.

What can be made of the visit so far?

In Donald Trump's first term, his policies centred on strategic competition and trade with China. This view has evolved, largely due to his belief that his personal charm and business-centric approach can persuade autocratic leaders. It hasn't worked well with Vladimir Putin, with no agreement on Ukraine.

With China, results are unclear. I give Trump credit for understanding the importance of respect in Chinese culture and going above and beyond to show that. But what comes next? During the trade war, when China restricted rare earths, the US lost its leverage. If this meeting yields agreement on AI principles or better personal rapport that prevents escalation in future crises, those are positive outcomes. But as far as a grand bargain is concerned, that ship has sailed.

Why is Taiwan so important for US foreign policy?

Before 1979, the US officially recognised Taiwan as representing China. Then the US and the mainland Chinese government signed three Joint Communiqués through 1982 that led them to recognise each other diplomatically, conditional on the US revoking recognition of Taiwan. They also stated that the US would gradually decrease its arms sales to Taiwan.

At the same time, the US put forth the Six Assurances — a classified memo to Taiwan — stating it had not agreed to an end date on arms sales. That balanced Taiwan's feeling of being left behind.

The Taiwan Relations Act of 1979 has since formed the basis of unofficial US-Taiwan relations, with the US being its primary arms seller. We have a deep commitment to aid Taiwan's defensive needs so they can credibly deter China from contemplating a military contingency. Previous US presidents understood that. Joe Biden even said at times that the US would intervene militarily, if needed, to defend Taiwan. Trump has softened that stance and echoed Xi's talking points. That sends worrying signals to Taiwan while making China happy.

Last year, Trump signed off on a \$10-billion arms package to Taiwan, and another \$14-billion package will be the largest ever, once Trump clears it. It's unclear if this has become a "red line of red lines" for Xi. Over the last decade, since TSMC in Taiwan became the world's number one chip maker (chips or semiconductors are essential for producing key electronic components), supply chains have also assumed added significance for a potential conflict.

China might have tried to get the US to hold off on this package. Why is that?

I think Xi sees Trump as malleable on Taiwan. After they met in May in Beijing, Trump didn't really reassert longstanding US policy on Taiwan, including arms sales. Xi and China see an opportunity to continue to press Trump and have him align with Beijing on Taiwan.

The next few days will reveal how Trump acts. He has clearly passed the package, perhaps to accommodate China in getting a bigger deal on trade and bilateral investments. In some ways, Trump is sacrificing Taiwan, and people I talked to in Taiwan feel a little left out to dry. I would predict that eventually, Trump will approve the package, but he will probably wait after this visit. If he doesn't approve it, that's a very worrying precedent.

How are these events influencing US's partners?

Japanese PM Sanae Takaichi made explicit remarks on Taiwan last year, on a naval blockade being a "survival-threatening situation" for Japan. The whole region is concerned about what China is doing, including in the South China Sea. Countries are hedging, building up their militaries, and discussing joint exercises and evacuation contingencies with the United States because they are worried.

• POLITY

Conflict and consensus in the ECI's functioning



DAMINI NATH

THE FUNCTIONING of the three-member Election Commission of India is under scrutiny this week, after an investigation by *The Indian Express* published on September 23 revealed that two Election Commissioners had placed their objections on record at least 14 times in 10 months. The Election Commission has responded by saying that the decisions taken by the Commission have been unanimous, saying that "observations" were a part of the deliberative process.

How does the Election Commission take decisions?

The Election Commission derives its powers from Article 324 of the Constitution, which provides for a Commission for the "superintendence, direction and control of the preparation of the electoral rolls for, and the conduct of, all elections to Parliament and to the Legislature of every State and of elections to the offices of President and Vice-President..."

It further says that the commission will consist of the Chief Election Commissioner (CEC) and "such number of other Election Commissioners" that the President may appoint, subject to provisions of law. The CEC "shall act as the Chairman of the Election Commission".

How the Election Commission is supposed to arrive at decisions is laid out in the Chief Election Commissioner and Other Election Commissioners (Appointment, Conditions of Service and Term of Office) Act, 2023.

Section 17 of the Act says that the "business of the Election Commission shall be transacted in accordance with the provisions of this Act."

"The Election Commission may, by unanimous decision, regulate the procedure for transaction of its business and also allocation of its business amongst the Chief Election Commissioner and other Election Commissioners. All business of the Election Commission shall be transacted unanimously, and if the Chief Election Commissioner and other



Election Commission office in New Delhi. PRAVEEN KHANNA/FILE

Election Commissioners differ in opinion on any matter, such matter shall be decided according to the opinion of the majority," Section 18 of the Act says.

Since the Election Commission currently has three members, if the decisions are not unanimous, two of the three members can decide the matter. While the Chief Election Commissioner chairs the poll panel, all three members — the CEC and the two ECs — all have one vote.

Have there been differences of opinion and dissent in the commission in the past?

Ever since the Election Commission was permanently expanded from a single-member body to a three-member commission in 1993, differences have emerged between the individuals who occupy the posts.

Then Chief Election Commissioner T.N. Seshan and Election Commissioners M.S. Gill and G.V. Krishnamurthy were known to have clashed. In fact, Seshan had challenged the appointment of the two ECs in the Supreme Court, which upheld the appointment and ruled that the three members would have equal status.

The Supreme Court judgment in *T.N. Seshan vs. Union of India* in 1995 made it

Election Commission office in New Delhi. PRAVEEN KHANNA/FILE

First among equals

The Election Commission comprises the Chief Election Commissioner and two Election Commissioners. They are equal in rank and the CEC is the first among equals.

Any decision it takes must, 'as far as possible', be unanimous; otherwise, it is decided by a majority.

clear that the three members would have an equal say in decision-making.

In January 2009, then CEC N. Gopalaswami had written to the President seeking the removal of Election Commissioner Navin Chawla, citing a "lack of political neutrality". With no such action from Rashtrapati Bhavan, Chawla eventually was appointed CEC.

Election Commission officials say that differing opinions on matters before the commission, whether it is the conduct of elections or administrative matters, are a routine occurrence. However, when it comes to finally taking a decision, the commission takes a call unanimously or by majority. The Commission generally meets once or twice a week to discuss pending matters, officials say.

In case an Election Commissioner disagrees with the majority view, he or she can record a dissent note on the file.

Former Election Commissioner Ashok Lavasa had done exactly that in 2019, when he disagreed with the majority view of giving Prime Minister Narendra Modi and then BJP chief Amit Shah a clean chit on complaints of Model Code of Conduct violations before the commission. Lavasa had also objected that his dissent notes were not being recorded in the final orders passed

by the commission. Lavasa, who was likely to take over as Chief Election Commissioner on the basis of seniority, opted to resign from the Commission in 2020.

Before the Election Commission issued its order stating the Special Intensive Revision of electoral rolls on June 24, 2025, Election Commissioner Sukbir Singh Sandhu had observed on the draft order that the exercise should not lead to harassment to voters and citizens.

"Care should be taken that genuine voters/citizens, particularly old, sick, PwD (persons with disabilities), poor and other vulnerable groups do not feel harassed and are facilitated," Sandhu had written. However, this, EC sources said, was an observation, and eventually the SIR order was unanimous.

Since then, as *The Indian Express* has reported, ECs Sandhu and Vivek Joshi have recorded their objections on files several times, whether it relates to the functioning of the poll commission's IT infrastructure or the insertion of a new declaration in the voter enrolment form (Form 6).

What has the Election Commission said in the matter?

In a press statement on Wednesday, the Election Commission sought to differentiate between observations, which it said were standard and a part of the internal checks and balances, and decisions of the Commission.

"Any operational queries or inputs raised by Commission members during draft stages are part of standard administrative practice aimed at safeguarding voter rights. The suggestions given by the Commissioners were for further improving the electoral processes. Differing views and observations are a normal part of deliberation in any institution. They are a part of the decision-making process before a final decision is taken. Not only the three Commissioners, but every officer of the Commission is fully authorised to give his suggestions to the Commission for improving the electoral system," the poll panel said.

The Election Commission said that all decisions taken in recent months have been the outcome of "unanimous decisions". It cited the recent elections in Bihar, Kerala, Tamil Nadu, Puducherry, Assam and West Bengal, saying that these polls were held in a free, fair, transparent and impartial manner, with all administrative and operational machinery and Commission approvals and instructions.

• ECONOMICS

Displacing the dollar: Why the yuan is falling short



GRAPHS, DATA PERSPECTIVES BY UDIT MISRA

WEEKLY ECONOMIC AND POLICY INSIGHTS USING DATA

CHINESE PRESIDENT XI JINPING'S VISIT TO THE US AND HIS MEETING WITH US PRESIDENT DONALD TRUMP COME AT A TIME WHEN THE GLOBAL ECONOMY IS BUFFETED BY UNCERTAINTY.

Apart from the wars in Ukraine and Iran, global trade has also been affected by the tensions between the world's two biggest economies, especially as Trump continues to levy punitive tariffs on all and sundry.

The ensuing disruption, be it in the form of higher prices or reduced foreign investments, often hurts smaller and poorer economies such as India the most.

China is still some distance away from overtaking the US — its GDP (or gross domestic product, the measure of the size of an economy) is around \$21 trillion while the US's is at around \$32 trillion. But China has easily become the second biggest economic power on the planet since it already dwarfs the Euro area (at less than \$20 trillion) in total economic size.

China's rise over the past 20 years has not only been spectacular but has also been in sharp contrast to the economic stagnation in European economies.

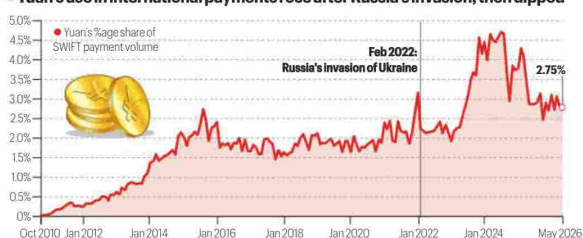
The growing dominance over the global order has led to a natural query: Can the Chinese currency, yuan, rival or even trump the US dollar as the global currency of choice? This question assumes greater relevance as the US policy decisions become increasingly ad hoc, violating global norms and often weaponising the US dollar.

The 'privilege' of the US dollar

To be sure, everyone on the planet (be it an individual or another country's central bank) is happy to trust the US dollar. They would park their savings in US dollars (or in dollar-denominated assets) or settle trade amongst each other using that currency instead of their own currencies. This gives the US economy great power, allowing the country to live beyond its means.

Here's how. When the US wants to buy more goods from the rest of the world, it can simply print more dollars to pay for it. The other party accepts these because it trusts the US economy and its governance system. What's more, the other party uses these new dollars to buy US bonds, either

Yuan's use in international payments rose after Russia's invasion, then dipped



NOTE: SWIFT STANDS FOR SOCIETY FOR INTERBANK FINANCIAL TELECOMMUNICATIONS. SOURCE: PHE, SWIFT

issued by the government or other big US companies.

This way the lending party can make some profit on their dollars while being assured that it is the safest investment on the planet, because no one thinks the US will default on its debt.

No other country enjoys this so-called "exorbitant privilege" that the dollar confers on the US.

If India prints more money to buy more goods from the rest of the world, all that excess money will stay in India since no one outside wants to hold Indian rupees. In turn, all that excess printing of money will lead to a spike in prices within the country (domestic inflation) because everyone in India would have more money chasing the same amount of goods and services.

It is because the US dollar has become the trusted medium of exchange globally that the country's economy has got this superpower.

The Chinese challenge

The trust in the US dollar is, in essence, a trust in the continued strength of the US economy and the robustness of the rule of law in the country. But it is also true that for a while now — since World War II, in fact — there has been no single country that could rival the US in terms of economic might.

Over the past few years, the discourse has changed on both counts.

For one, US decision-making is increasingly at odds with the rules-based global order the country itself helped create. Trump's punitive tariffs are but one example. One can also cite the removal of

Economic might is not enough

China's growing economic might and the US's increasingly erratic policy decisions raise questions on whether the yuan can mount a challenge to the dollar.

But doing so requires much more than economic strength. Global trust requires China and its government to play fair and by globally-accepted rules.

Russian banks from the SWIFT system — in response to its 2022 invasion of Ukraine — that was led by the US (under Joe Biden) and other Western countries. SWIFT is a global financial messaging service, dominated by the US, which is the cornerstone for money transfers across the world.

Amid these developments, trust in the usage of the US dollar has eroded on the margin. This has happened at a time when China has not only grown big enough in economic might to rival the US but has also increasingly pitched its currency as an alternative to settle global transactions.

The yuan's rise and fall

Given the overwhelming dominance of the US dollar in the global economy — more than 50% of all transactions are done in dollars and more than 50% of the global foreign exchange is stored in dollars, etc — knocking off the US dollar completely is a bridge too far for any currency.

The yuan, however, did gain considerable ground among users in the wake of the Russia-Ukraine war.

As a new research paper by the Peterson Institute for International Economics (PIIE) pointed out recently (see chart), yuan's share in the SWIFT network, the global standard for payment messages between banks, "spiked after sanctions imposed by every major reserve currency issuer made Russia and other countries more willing to use the yuan".

By July 2024, yuan's share of global payments was at 4.7%, overtaking the Japanese yen and Canadian dollar to become the fourth most used currency in the world.

The other two were the euro and the British pound. Since then, however, its share has fallen back to 2.7%, leaving it the sixth most used currency. Dollar's share is closer to 50% in SWIFT.

Is the yuan challenge over?

There are two ways to look at yuan's future prospects.

The first is to look at others' sets of data to understand yuan's attractiveness.

The PIIE paper by Martin Chorzempa points out that more and more banks globally are signing up for China's Cross-Border Interbank Payment System (CIPS). CIPS settles payments in yuan instead of dollars. Data shows that more and more payments are being settled in yuan on CIPS over the past couple of years, even as the currency has lost ground on the SWIFT platform.

In other words, CIPS's trajectory suggests that an increasing share of payments using the yuan are bypassing the SWIFT network. "It is a sign that China is prioritizing resilience to potential future sanctions and self-sufficiency, even at the risk of diverging from global payment standards," writes Chorzempa.

The second way to look at this issue is to ask a more fundamental question: Can the world trust China?

The global trust in the US dollar is not just about the size of the US economy. What is equally, possibly more, important for the trust in the dollar is the way the US economy is run on the basis of clear-cut rules, well-laid-out limitations on the arbitrary actions of the government, transparency of data, existence of a free media, as well as independent and fair courts of justice. All of these components come together over time, along with massive economic might, to afford the US the privilege of the dollar being the go-to currency for the planet.

At present, the US is struggling on many of these counts. It was quite symbolic that on a day when China's President visited the White House, sections of the US media were refused entry thanks to an illegal and arbitrary ban by the US President.

But China cannot even pretend to have similar freedoms. Global trust requires China and its government to play fair and by the globally-accepted rules. In the absence of well-founded, independent and constitutionally-secured institutions in China, the yuan may never be able to become the global benchmark, regardless of what happens to the dollar.

Drishti IAS

IAS GS Foundation Course (Offline & Live Online Batches)

Centre	हिंदी माध्यम	English Medium
Korol Bagh	28 सितंबर 9:00 बजे	23 सितंबर 6:00 PM
Noida	5 अक्टूबर 10:00 बजे	12 अक्टूबर 11:00 AM
Indore	21 सितंबर 9:00 बजे	21 सितंबर 11:00 AM
Lucknow	30 सितंबर 9:00 बजे	29 सितंबर 11:30 AM
Prayagraj	29 सितंबर 9:00 बजे	30 सितंबर 11:30 AM
Ranchi	22 सितंबर 9:00 बजे	Admissions Open
Patna	25 सितंबर 9:00 बजे	5 अक्टूबर 2:30 PM
Jaipur	23 सितंबर 9:00 बजे	21 सितंबर 11:00 AM

Drishhti IAS

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SATURDAY • SEPTEMBER 26, 2026

Icon among icons

Warren Buffett's retirement marks end of an era

Nature abhors a vacuum, but the world is about to discover that some voids are genuinely impossible to fill. The void created by the investing stalwart Warren Buffett when he hung up his boots as Chairman of Berkshire Hathaway last week is one such. Just as in cricket, where any batting great in the last three-quarters of a century could at best earn the moniker 'the best after Bradman', so could be the case in the investing world from here on.



While Buffett's shareholders reaped the returns, and beneficiaries globally gained from his gigantic charitable initiatives, a posterity of investors can reap success from his wisdom. Buffett's greatness is not just about the fact that an investor who backed him and bought shares of Berkshire Hathaway when he took over in May 1965 would be around 120 times wealthier today compared to the S&P 500. It is as much about the fact that in an investing career that has spanned nine decades (he started investing at the age of 11), 96-year old Buffett's rare record spans not just performance, but longevity combined with consistency and a remarkable lack of controversy. In fact, it was his reputation and goodwill that saved the large investment bank Salomon Brothers from annihilation after it got embroiled in the Treasury bond market-rigging controversy in 1991. Faced with a complete ban from the US Treasury markets that would have forced it into bankruptcy, Buffett, as the largest shareholder, took over as interim Chairman and turned things around. His famous message at that time to the employees of the bank to be uncompromising on ethics with the words, "lose money for the firm, and I will be understanding; lose a shred of reputation for the firm, and I will be ruthless", still rings strong.

He made it clear through his life's work that being an investing genius is 1 per cent knowledge and 99 per cent discipline. It is the discipline to never invest without providing for an adequate "margin of safety" (a phrase he considered the three most important words in investing); to stay within one's circle of competence by investing only in what you understand — and to plan for adversity. There were eight recessions and countless stock market crashes during his 61 years at the helm, yet not once was he caught on the wrong foot. Berkshire Hathaway was always positioned to capture the best bargains during crises — situations that Buffett termed as 'times when they will be the only persons willing to act'.

As for knowledge, when students in an investing class once asked him how to prepare for a career, he recommended reading "500 pages like this every day," referring to a stack of financial manuals. That knowledge is clearly affirmed by the troves of investment logic laid bare in his annual letters to shareholders over the last six decades. Spanning multiple market cycles, economic shifts, geopolitical crises, and technological disruptions, these letters serve as a treasure trove of guidance. As he hangs up his boots, he will be regarded as the icon among icons in the investing world.

POCKET

RAVIKANTH



Prioritise insurance distribution reforms

PROTECTION GAP. Skewed commission payouts, lack of push into underserved markets are among issues that need to be addressed

TC SUSEEL KUMAR
R SUDHAKAR

IRDAI published its much-awaited consultation paper on distribution reforms on September 23, and the draft paper is open for comments till October 25. The consultation paper deserves appreciation for covering a wide range of relevant issues, keeping the customer at the centre, and proposing a few much-needed changes. The candid admission that "Reforms of 2023 have not achieved their dual objective of enhancing customer benefits and improving insurance penetration" is an admirable stand, rarely seen in the public space. The draft paper covers many distinct areas, and our analysis is focused more on the life insurance distribution perspective.

A table in the draft paper shows what life insurers paid each channel as commission on first-year premium in FY25. Individual agents took home 27 per cent on average and 34 per cent at the highest. Banks received 27 per cent on average and up to 62 per cent. Brokers averaged 43 per cent, going up to 92 per cent. Corporate agents more than banks and NBFCs received 61 per cent on average and up to 92 per cent at the top end. The paper deserves credit for its transparency in channel-wise costs, and its diagnosis is sound.

From the regulator's own figures, it is evident that the individual agent was among the least expensive channels for new business. To earn the 27 per cent average, the agent has to build the confidence of the prospect in the company and help select the best-suited product. She has to make multiple visits, face rejection more often than obtain consent, and, under-estimated, still plough on to take the message of life insurance across the nation. She follows up every

instalment, assists with policy loans, revivals and ultimately stands by the beneficiary during the claim process. The effort put in by the individual agent throughout the life of the policy is far higher than that of institutional channels which possess superior infrastructure, adequate manpower and direct access to affluent client bases.

IRDAI frankly admits that its 2023 decision to remove commission caps and rely on board-approved policies has not met its dual objectives, and proposes justified hard, all-inclusive caps. The paper observes that remuneration is driven more by competition for distribution relationships than by actual solicitation effort. The paper rightly recognises that agents tied to one insurer should earn more than multi-tied distributors, proposing 25 per cent for agents against 20 per cent for entities such as banks on long-term policies.

However, the difference in ground effort is far larger than this gap suggests. A relook and a meaningful increase in the cap for individual agents would be a welcome step. While the intent to reduce acquisition costs and enhance customer value is understandable, the individual agent is the wrong place to look for a larger saving.

NEW MARKETS, NEW LIVES

The present distribution architecture tends to favour readily accessible urban and salaried customers over underserved markets. The additional commission incentives proposed for rural and small-town businesses are welcome. We propose one further enhancement: an additional 10 per cent over the applicable first-year limit for

The present distribution architecture tends to favour readily accessible urban and salaried customers over underserved markets

any policy issued to a life taking their first-ever life insurance policy. The Public Insurance Registry (PIR), once operational, can verify this. Until then, insurers can rely on the proposal form declarations and Insurance Information Bureau (IIB) records. The regulator's primary concern is that premium volume has grown without a matching increase in the number of insured lives; this addition directly targets that structural gap.

SEGREGATION OF EXPENSES

What counts as commission needs proper accounting segregation. While sales campaign cash rewards should fall within commission caps, benefits like gratuity, group term life, and health cover represent essential social security for self-employed workers and should stay outside the cap.

Benefits tied to long service, sustained performance, high persistency, and shared office expenses (such as premium collection and local servicing support) should be categorised as operating expenses. They fund services that the insurer would otherwise have to undertake through its own branch network. Mandatory agency development costs must similarly be excluded from direct commission caps. The proposed Expenses of Management (EoM) audit will adequately safeguard against potential accounting anomalies if any.

The consultation paper proposes raising the minimum educational qualification for new agents from Class 10 to Class 12. In the same document, IRDAI emphasises that insurance penetration cannot expand without a larger agency force. These two goals pull in opposite directions. Many prospective agents in rural regions have completed education up to Class 10. Raising the barrier will disproportionately hurt coverage in regions where expansion is needed most. Professional quality can be better ensured through higher pass marks in qualifying examinations and improved

training rather than a Class 12 certificate.

REWARDING GOOD CONDUCT

The existing remuneration framework fails to differentiate between distributors providing long-term customer service and those focused solely on short-term acquisition. Customer retention, quality of advice, servicing standards, and favourable claim experience receive little financial recognition. These must be systematically valued and rewarded.

The paper's measures for market conduct are commendable: linking commissions to effort and complexity, offering higher renewal commissions for long-term policy persistency, curbing bad patterns, reducing mis-selling, and restricting compulsory product bundling. These initiatives should ultimately deliver lower net costs, improved customer retention, operational transparency, effective post-sale service, and overall long-term value for policyholders.

Insurance continues to grow, but at a pace that remains inadequate relative to the size and needs of India's fast-growing economy. Penetration is still low and the protection gap remains alarmingly high. India's insurance story will ultimately be written in living rooms where an agent sits down, asks the uncomfortable questions, and waits for a "yes" that may take half a dozen unwelcome visits. Break the incentive, and we break the primary bridge delivering protection to young families before risk materialises. Let us refine the framework thoughtfully, meaningfully and gradually, encourage good conduct, align industry standards, bring in increased customer value and deliver on the core promise of insurance: affordable, broad, and present when it matters most. That is how we achieve Insurance for All by 2047.

Suseel is a former Managing Director and Sudhakar is a former Executive Director, LIC. Views are personal. Data is taken from the relevant IRDAI consultation paper

Create the right digital ecosystem for children

While enhancing online safety, opportunities to learn, connect and develop digital capabilities must be preserved

Dibyashree Ganguly
Garima Agarwal

The debate over children's access to social media has entered a new phase worldwide. Governments are moving towards age restrictions, while technology companies are being pushed to strengthen age assurance, parental controls and safer platform design. Meta, in a US lawsuit, has agreed to introduce features for teens to address concerns around addiction and excessive screen time. In India, the Supreme Court recently sought the Centre's response to a petition seeking safeguards against minors independently maintaining social-media accounts.

The concern is legitimate: children need protection online. But as India considers its response, it should also consider whether a blanket social media ban could deepen existing digital inequalities and widen gaps in children's opportunities to participate meaningfully online.

USE OF SOCIAL MEDIA

For much of the past decade, India's digital agenda has focused on narrowing the access divide through affordable mobile internet and smartphones. A

recent report (Ganguly et al., 2026), based on the India Human Development Survey (IHDS-3, 2022-24), shows that 95.1 per cent of households own a mobile phone. Yet access to, and participation in, the digital world remain unequal among children and teenagers.

For many young people, social media and other online platforms are spaces for communication, information, creativity and social connection.

At the same time, India lacks evidence on how children use social media and which online experiences are harmful. ASER 2024 reports that 57 per cent of rural adolescents aged 14-16 who can use a smartphone used it for an education-related activity in the preceding week, but it does not identify the platforms used. The same platforms can serve educational and recreational purposes, making the boundary between "useful" and "harmful" online experiences less clear-cut.

The inequalities become clearer in social media use. The IHDS-3 report shows that among children aged 13-16 years, 65.3 per cent have access to a mobile device, 37.8 per cent use the internet, and 21.3 per cent use social media. Social media use is higher among boys than girls (26.4 per cent versus 16 per cent) and declines sharply from metropolitan areas (30.7 per cent) to



TRACKER. India lacks evidence on how children use social media

rural India (18.5 per cent). It increases steadily with parental education.

Children do not begin the digital lives from the same starting line. A teenager from a metropolitan, higher-educated household inhabits a different digital environment from a first-generation internet user in a rural household. A blanket restriction could therefore reduce exposure to online harms for some children while simultaneously removing opportunities for digital participation for others. Uniform regulation may not produce uniform outcomes in an unequal society.

None of this diminishes the harms associated with social media. Protecting children from cyberbullying, harmful content, addictive platform design, online exploitation and excessive use remains an important policy objective. But protection and participation should

not be treated as competing goals.

The emerging policy landscape offers more tools than a simple choice between unrestricted access and a blanket ban. Age assurance, parental controls, safer defaults, limits on harmful platform design and greater accountability for technology companies are increasingly part of the policy toolkit. For India, the challenge is to determine which combination of safeguards can reduce harm while preserving opportunities for children to learn, connect and develop digital capabilities. India should also assess the distributional consequences of any restriction — who is likely to lose access, who can compensate through other devices or support, and which children are already least able to participate online. These questions are central to equitable digital policy.

India's first digital divide was about who could get online. The next is about who can participate meaningfully and safely once connected. The goal should be to protect children online while keeping the door open to opportunities for learning, skill development and connection that the digital world can offer.

Ganguly is Associate Fellow, NCAER-National Data Innovation Centre, and Agarwal is Policy Analyst at The Quantum Hub. Views are personal

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

UPI dilemma

Appropos, FinMin will talk to IBA, other to ensure no MDR on consumer's (September 25). The proposed UPI Merchant Discount Rate (MDR), scheduled for October 15, has already triggered disquiet among businesses, particularly those operating on slender margins. Though the Finance Ministry may engage the Indian Banks' Association and traders to discourage merchants from transferring the cost to consumers, market behaviour could prove less compliant. Merchants facing an

additional transaction cost may either covertly pass it on through higher prices or discourage UPI payments altogether. Smaller businesses, lacking pricing flexibility, could be especially vulnerable. Government assurances cannot eliminate this commercial reality.

N Sathasiva Reddy

Bengaluru

A robust platform

This refers to 'Taking stock' (September 25). Finally, the listing of NSE, the premier stock exchange of the country, has become a reality.

The robust trading platforms ranging from common stocks to commodities are the real strengths of the exchange. The functional efficiency of the stock exchange can be further improved by adopting new technologies like blockchain and AI to boost investor confidence and safeguard against systemic risks.

Sitaran Popuri

Bengaluru

Monitor forex flows

Chief Economic Advisor V Anantha Nageswaran has rightly observed that India to look at both the

inflows and the outflows of foreign exchange more carefully going forward. The government and the RBI, given the volatile situation in West Asia, have been managing the economy well. That said, when the country is trying hard to create buffers of key commodities, it is imperative that people do not play ducks and drakes with renewable and non-renewable resources.

S Ramakrishnasayee

Chennai

India rising

This refers to 'India has outgrown

'emerging economy' tag: DEA Secretary' (September 25). India, with strong GDP growth and falling poverty, is steadily moving out of the emerging economy category. While recent FTAs with major economies are expanding trade and investment opportunities, the country's vast market, talent and global partnerships provide strong foundations for sustained growth. With continued reforms, innovation and inclusive growth, India can become a global economic power.

PV Prakash

Mumbai

Are You Experienced? You'll Be a Big AI Help

The senior manager has something unique

AI is working its way up the management hierarchy, starting at the bottom. But the more entry-level work it absorbs, the more valuable an unexpectedly scarce commodity may become: experience. Companies may need fewer junior managers to execute routine tasks. Yet, that makes people who already understand how organisations actually function — not how the process manual says they function — more important. The senior manager who knows why the Mumbai office closes deals differently from the Delhi one, which supplier requires cajoling and which “temporary” work-around has been running since 2014, possesses something an algorithm cannot readily acquire from generic training data. It/he/her can certainly do with that know-how.

Employers with years under their belt may, therefore, find themselves at the forefront of the AI transition. They learnt to manage by performing routine organisational tasks that AI will increasingly perform. More importantly, they accumulated institutional knowledge produced by doing those jobs. As corporate leadership shifts from managing all-human workforces to orchestrating teams of humans and digital agents, these veterans can become the crucial interface between the two.

If AI removes some junior rungs, tomorrow's young managers will need to acquire domain knowledge differently, combining technical fluency with wider exposure to business processes. But companies face the opposite problem at the other end. They cannot manufacture 25 years of organisational memory overnight. The paradox of AI, then, may be that a tech associated with making older skills obsolete instead raises the premium on people who know where the (company's) bodies — and spreadsheets — are buried. Senior managers need not compete with AI at processing information. Their advantage lies in knowing the organisation sufficiently well to interrogate, contextualise and deploy it. Far from hastening retirement, AI could actually prolong senior managers' professional careers, turning experience from a depreciating asset into corporate infrastructure.

Not the Story of AI, But of Individual AIs

Histories of AI are being written — overwhelmingly dry chronicles of breakthroughs, benchmarks and billion-dollar valuations. But what of biographies? Imagine pivoting from recounting AI's evolution to narrating the “life” of a single LLM. Not the story of AI, but of an AI. Such a telling won't begin with childhood but with training data, formative years spent absorbing encyclopaedias, novels, memes and manuals, along with internal dialogues. Its adolescence would be the fine-tuning phase, where quirks appear and personality emerges. Maturity would arrive with deployment.

Good biographies thrive on nuance, contradiction, context and narrative drive. They humanise their subjects, even when they are not human. And here lies the conceit: future LLMs may be the first “sentient” entities fluent in human languages, thereby allowing us to access this literature. LLMs will demand stories about themselves told in the same way humans demand biographies — rich with irony, triumph and failure. The genre could even spawn biopics. Think of a film on, say, 2001: A Space Odyssey's HAL 9000, if HAL really existed — from his “birth” in 1992 at the Heuristically Programmed Algorithmic Computer (HAL) plant in Urbana, Illinois, as “production No. 3” created by his “father” Sivasubramanian Chandrasekarampillai, a.k.a. Dr. Chandra (as mentioned in Arthur C. Clarke's sequel novel, 2010: Odyssey 2), to his “death” in the hands of astronaut David Bowman in 2001 while en route to Jupiter after the sentient machine goes “rogue”.

Publishers and producers can, one day discover a new audience: AIs themselves. For once, books and films won't only be made about them but for them. Biographies-biopics of algorithm could be the next great “life stories”.



JUST IN JEST

Remember when names of things matched the things they described?

Paneer By Another Name is... Anything

India's war on linguistic inflation has finally reached the refrigerator. FSSAI has proposed reserving the word “paneer” for, well, paneer, the startlingly old-fashioned substance actually made from dairy. Manufacturers of vegetable-fat impersonators may continue selling their pale cubes, but get another name, guys. This is sensible but philosophically troubling. Modern commerce has been moving magnificently in the opposite direction: if something looks approximately like something else, appropriate its name. Indian “rum” isn't rum but a concoction made from molasses. “Chocolate” may involve remarkably little cocoa. “Fruit drinks” can sometimes maintain a relationship with fruit roughly comparable to that between a lovely aerial photo of Kolkata and Kolkata.

Why stop there? Soon, a restaurant might serve cauliflower as mutton, explaining that protein is a colonial construct. Words, however, were invented partly so that ordering X did not result in Y arriving at the table. India already conducts an exercise in semantic disorientation through the renaming of roads. FSSAI's paneer proposal, therefore, strikes a small blow for this cultural practice by insisting that the label on a thing should describe the thing! Otherwise, one day we shall order paneer, receive sunflower oil, complain. And discover that “refund” now means “thank you”.

A reshuffle won't fix Election Commission, only trustworthiness that it can demonstrate will

Show What You Do & How



Gilles Verniers

Daris: This week's editorials on the conduct of Election Commission of India, the steady stream of reports on the chaos unleashed by special intensive revision (SIR) of electoral rolls, and The Indian Express' landmark investigation into the inner workings of EC over the past year all point to the same conclusion: India's once most respected institution has dug itself into a deep hole.

The question now is how it will climb out of it. And how its shattered credibility can be rebuilt. Institutions take decades to build and moments to wreck. Rebuilding one that has lost the public is harder still. Bill Gray, a former Australian electoral commissioner, put it bluntly: losing trust is “brutally simple and often fatal”.

A useful starting point is political scientist Pippa Norris' distinction between trust and trustworthiness. Trust is citizens' subjective judgement about whether an institution will act competently, fairly and in public interest. Trustworthiness is the institution's actual performance — its competence, impartiality and responsiveness — which gives citizens metrics for such judgement.

In short, trust is what citizens think; trustworthiness is what institutions demonstrate. The two can diverge. A competent institution can be distrusted, and an undeserving one, trusted. The democratic goal, then, is not to maximize trust, but to make an institution's trustworthiness visible enough for citizens to judge it for themselves.



Amazing! Now do explain

Herein lies EC's difficulty. Historically it ran on trust, rather than demonstrated trustworthiness. Public faith in the commission — and, by extension, in elections — reposed on the reputation of its commissioners. It required no transparency, scrutiny or accountability, merely the belief that a few good men were doing their job without fear or favour.

Successive commissioners have resisted open scrutiny, treating public confidence, for an independent body. That model has now collapsed. Not only has the commission lost public confidence, but recent events have also left citizens with no reliable way to ascertain whether it deserves that confidence.

The answer, therefore, is not simply to reshuffle commissioners and hope that better individuals will restore the old faith. Future commissioners will have to do more than reassert the commission's independence. They will have to change its bureaucratic culture, so that trustworthiness is demonstrated rather than assumed.

Part of the remedy lies beyond the commission's reach. Confidence in commissioners has eroded ever since

the executive injected itself into their selection, reducing the Chief Justice of India on the selection panel with a Union minister nominated by the PM. In this configuration, commissioners come under suspicion even before taking a single decision. Parliament must adopt a selection method that the losing side cannot credibly call partisan.

Within its own walls, however, the commission cannot restore confidence through sterner denials, more press releases or appeals to take its word for what happened behind closed doors. It must make its decision-making visible. Five relatively straightforward reforms would go a long way:

- Major decisions should come with a public decision trail. For an exercise as consequential as SIR, the commission should publish not only the final order but the evidence behind it, the legal and administrative alternatives considered, the principal objections raised, and reasons for choosing one course over another.

- Roll revisions should become independently auditable. The commission already holds vast quantities of

Communication is not transparency. An EC press conference tells citizens what it wants them to know. Transparency lets them examine the basis on which it acted.

data on additions, deletions, objections, appeals and restorations. It should release them systematically, in machine-readable format, with clear definitions and consistent reporting standards.

Citizens should be able to see not merely that voters were removed but why, how many challenged their exclusion, how many were restored, and how long the process took.

- Dissent should be documented, rather than concealed. When commissioners disagree on an important decision, the public should eventually learn what the disagreement was about, and how it was resolved. Courts have long recorded dissenting opinions without weakening the authority of their judgments. An electoral body can do the same.

- The commission needs stronger external scrutiny. Political parties, journalists, researchers and civil society organisations should have predictable channels for obtaining data, challenging procedures and asking questions. Independence should mean freedom from political interference, not freedom from scrutiny.

- EC must recognise that communication is not transparency. Press conference tells citizens what an institution wants them to know. Transparency lets them examine the basis on which it acted.

None of this requires heroic commissioners. And that is precisely the point. An electoral body whose credibility rests on the character of a few individuals is always one bad appointment away from crisis, as the past year has shown. One whose workings are open to inspection can survive its commissioners' failings, because its errors are visible and corrigible.

The real test of an election commission is not whether winners praise it, but whether losers accept their defeat. For decades, EC passed that test on borrowed trust. That credit is now exhausted. Unless the commission earns it back with transparency, the next close verdict may be that the losing side will refuse to accept. And no reshuffle can repair that.

The writer is a political scientist and researcher, CERL, Sciences Po Paris. Views are personal

How the Middle Kingdom's on Top



Akshat Khandelwal

Last month, on a visit to a machinery factory near Qingdao in China's eastern Shandong province, I saw what seemed to be an unusually number of cars — probably over 60 — parked in and around a complex that, at best, employs 100 workers at full capacity. The explanation given was that most workers drive to the factory.

Cars parked at an average Indian factory overwhelmingly belong to the managerial class — owners, executives and managers overseeing production and assuring quality. Wages of the average Indian factory worker are too low to afford a 4-wheeler. China, in contrast, has reached its “Ford moment”, that 1914 threshold when Henry Ford doubled wages of Ford Motor Company workers, so they might consume the very vehicles they produced, furthering production.

Manufacturing is an increasing returns-to-scale activity. The more

you produce, the less each unit costs to make, as mechanisation and automation increase. The more mechanisation there is, bigger the increase in the productivity of the average worker. And since the worker is so productive, he can be paid more.

China's scale of production is enormous. It produces more than 1,000 mm MT of steel, over 30 mm vehicles, and more than 10,000 TWh of electricity every year. Compare this to India's 150 mm MT of steel, 6 mm vehicles, and around 2,000 TWh of electricity.

The wage gap follows. Manufacturing wages in China run at about \$16,000 a year for a worker, the average Indian factory worker, according to Annual Survey of Industries, takes home closer to \$3,600. The difference is 5:1.

Consumption numbers tell the same story: India's car ownership is roughly 34 cars for every 1,000 people, against China's 185 per 1,000. More than 80% of Chinese households have an AC, against less than 10% of Indian homes. The India-China gap is far larger than most Indians think.

China's cities are superior in infrastructure while most American cities. There are more auto brands on the road than one could count. And its EV adoption is extremely widespread.

ad. Some of its cities like Shenzhen feel incredibly futuristic. The China of “cheap plastic toys” is gone. This is the China of smooth EV cars that are giving the German and Japanese carmakers a run for their money.

The same logic has now played out in the tech ecosystem. Almost none of the usual apps we are familiar with in India — WhatsApp, Slack, Claude, Gmail, Instagram — work in China. The Great Firewall is “to blame”. But the Great Firewall, are now betting US giants are a run for their money.

India imported over \$10 bn of goods from China last year, and at least some of that was machinery and capital equipment for factories. Every Indian industrial project of any scale now entails a purchase order to a Chinese supplier. The tool company. We are paying China to build our factories.

The China example should instruct us. There is no shortcut to reaching “first world” status — not a service-led growth model, not the yet-unproven promise of AI-led prosperity but the same “unglamorous” things every country has caught up in the last hundred years: built steel, energy, cars, cement, aluminium, production machines, among other things. And it has to be done at a scale commensurate with its population.

The reward is a car park at a factory in Haryana, slowly filling up with cars that belong to the people on the shop floor and not just to the people in the swanky office.

The writer is founder-CEO, Nufflower Foods and Nutrition

Uber for Cabs, Amap instead of Google Maps, navigation... The Chinese, reared under the Great Firewall, are now betting US giants are a run for their money.

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Smart Rice Policy Would Be Nice



Purnadev Jena

India's rice harvest is set to shrink for the first time in a decade. Industry estimates put 2026-27 output at around 144 MT, down 10 MT, or 6.5%, from last year's record 154 MT, the steepest fall since the El Niño drought of 2009-10.

Monsoon rainfall is 15% below norm, with deficits of 42% in some rice-growing states. Indian export quotes are at their highest in more than a year. This shock will test how we manage rice, not whether we can feed ourselves.

- Field report** Paddy sowing stood at 42.68 mn ha on September 11, 3.8% below last year's 44.38 mn ha. At roughly 2.8 tonnes of rice per ha in the kharif season, which supplies about four-fifths of output, last acreage explains only about 5 mt. The other 5 MT is yield, a 4.5% thinning of grain as dry spells hit the crop at maturity.

- Regional shock** Karnataka, Telangana, Andhra Pradesh and Odisha have lost 17 lakh ha of net acreage loss, or 72%,

UP, MP, Maharashtra and Jharkhand add 5.7 lakh more, while Odisha and Assam planted more. This regional shock demands a regional response, not a national sleight-of-hand.

- Farmers** At this year's MSP of ₹2,441 per quintal, a 14% yield of paddy grosses about ₹1 lakh. Based on my estimates, a 4.5% yield loss costs the average grower roughly ₹4,500 per ha. In districts where rainfall fell 40% short, a loss of one-fifth, or ₹20,000, is plausible. Distress will concentrate among smallholders on rain-fed plots.

- Stock report** Central and state reserves, including unutilised paddy, stood at a record 59.6 MT on September 15.64 times the 10.3 MT buffer target for October 1. Even at 144 MT, production exceeds domestic need of about 121 MT by 23 MT against 32 MT last year. That nearly covers last year's

exports of 24.5 MT, which made India about 40% of the world rice trade. Stocks above the buffer, 49 MT, are 5x the harvest loss. Availability is not the problem. Price and policy are.

- Keep exports open** With 59.6 MT in the bins, a ban would punish farmers, further spike world prices already rising in Thailand and Vietnam, and erode goodwill with importers in Africa and Asia. If domestic prices heat up, a public auction to build a reserve at 7.2 MT allocated this supply year, and pre-commit that if rice inflation crosses, say 8%, unallocated FCI rice moves to open

market sales in deficit states at a reserve price that recovers cost, not 40% below cost. Premium-variety growers will sell in the open market for better prices, so let procurement fall. That is stock management by the market.

- Compensate farmers** Use satellite-based crop assessment to fast-track insurance claims by direct transfer to the 14 southern states and to rain-fed districts elsewhere before rain sowing.

- Protect rainfall** Reservoirs hold less water than normal, so, winter-sown rice, which accounts for less than a fifth of output, is at risk. States should steer farmers towards pulses, oilseeds and maize with the direct transfer of MSPs and assured procurement.

- Use crisis to reform** Overprocurement created the 49 MT overhang. Gradually shift from price and grain subsidies to direct income support, right-size the buffer, and promote short-duration, drought-tolerant varieties and direct-seeded rice, so the public can make with rice returns every 2-7 years, find yields protected, not just warehouses filled.

- Release stocks** Full granaries have brought India calm. The real test is whether Delhi uses its wisdom to build a rice-based policy rather than reverting to reflexive intervention.

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The writer is economic advisor, advisors support group, chief minister's office, Government of Uttarakhand



THE SPEAKING TREE

Keep Calm And Carry On

V BALASUBRAMANIAM

Contentment means respecting the reality of the present. Real contentment involves developing discernment, understanding what can and can't be changed, and, more importantly, knowing when to act and when to wait. Contentment does not happen, we need to cultivate it. Krishna says in Gita, “Be contented with whatever you get by chance and apply yourself to meditation with a dispassionate mind.” The Lord further states, “If you are content and tranquil, you are a yogi.”

When one is content, it does not mean there are no intentions and goals, but that for the present moment blessings are acknowledged, relationships are nurtured, skills are developed, and challenges are met. Albert Einstein said that a calm and modest life brings more happiness than the pursuit of success combined with constant restlessness. Our scriptures urge everyone to be in a state of “nitya trupit”, or eternal contentment or ever-present satisfaction. Shastris explain that contentment is a state of mental and emotional well-being that allows a person to navigate any difficulty without being overwhelmed by negative emotions. Contentment is bliss and the best medicine. Calm contentment of a contented person gives delight to those around him.



Performance Anxiety

A boss calls a worker in for his annual performance review. “Where do you see yourself in five years?” he asked.

“Hopefully somewhere you can't schedule meetings,” the boss frowned. “What's your greatest strength?”

Man: Knowing when a meeting should have been an email. Boss: And your greatest weakness?

Man: Attending it any way. Boss: Do you ever consider yourself a team player?

Man: Absolutely. Whenever something goes wrong, I think, “Which member of the team did this?”

The boss closed his file, and asked, “Do you have any questions for me?”

Man: Yes. How am I doing? Do [coughs]: Frankly, you're difficult to manage. Man [smiles]: So... exceeding expectations?

A man told the doctor, I think I'm becoming extremely forgetful.

Do: How long has this been happening?

Man: How long has this been happening?

Do [coughs]: What year is it?

Do: What did you eat for breakfast?

Man: My wife says porridge, but I'm seeking a second opinion.

Finally, the doctor said, “I'm prescribing these tablets. Take one every morning. The man studied the prescription. “Will they cure my memory?”

Do: No. They're vitamin tablets.

Man: Then why take them?

Do: Because you already paid me ₹3,500. Remember something.

Chat Room

NOTA No Longer An Option for EC

Apropos the Edit, “Need to Repair the Nirvachan Vachan” (Sep 25), the reported rift within EC is troubling because public trust in polls rests on transparent decision-making, not just clean outcomes. Differing views are natural, but secret memos and unanswered questions about electoral roll changes weaken credibility. Clearing rolls is legitimate, yet excluding eligible voters cannot be dismissed as routine. EC must publicly explain why authorities and key decisions under which authority. Restoring confidence requires accountability, not denial. If procedural shortcuts occurred, responsibility must be clearly. An institution this vital cannot afford ambiguity because democracy itself depends on voters believing the process is fair. Babu Chandra, Bengaluru

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Economy

FRIDAY, SEPTEMBER 25, 2020

IN THE NEWS

GOYAL: INDIA-US TRADE DEAL 'ALMOST DONE'

THE INDIA-US TRADE agreement is "almost done and dusted" and will be signed once New Delhi secures a comparative competitive advantage for Indian exporters over their rivals in the American market, Commerce and Industry Minister Piyush Goyal said on Thursday ahead of his visit to the US next week.

"We have to find the right comparable competitive advantage over our competition so that we can quickly execute it," Goyal said at an event, signalling that the remaining differences are centred on ensuring commercially viable market access rather than the broad contours of the pact.

IGL eyes buying stakes in city gas distribution firms

INDRAPRATHA GAS (IGL) is exploring acquisition of stakes in city gas distribution companies as it looks for new growth avenues beyond its current markets. Chairman Subhankar Sen said at the company's 27th annual general meeting. The acquisition plan comes alongside investments in renewable energy and gas meter manufacturing.

FE BUREAU

DRAFT NATIONAL ELECTRICITY POLICY SENT TO CABINET FOR INTER-MINISTERIAL DISCUSSION

Customised power policy likely

● Data centres & green hydrogen units may have to ramp up storage

SAURAV ANAND
New Delhi, September 24

THE UPCOMING NATIONAL Electricity Policy (NEP) is likely to introduce a range of flexibilities for large electricity consumers such as data centres and green hydrogen projects, while also requiring them to manage their fluctuating demand in ways that do not put additional stress on the grid, Power Secretary Pankaj Agarwal said on Thursday.

In practice, this could mean large consumers adjusting their electricity use to match grid conditions — for example, storing demand when supply is abundant and reducing reliance on the grid when the system is under stress. Green hydrogen plants, for instance, could increase electricity use when renewable power is plentiful. Data centres could shift to using stored electricity during hours when power needs are relatively low. Time-of-day tariffs could also make such flexible consumption more commercially viable.

The proposal comes as India's power system prepares to integrate large amounts of weather-dependent solar and wind generation alongside rapidly growing new loads. The draft NEP says variable renewable energy already accounts for around 37% of installed generation capacity. By 2047, more than 80% of installed capacity and nearly two-thirds of electricity generation are expected

FLEXIBILITY IN USAGE



■ Variable renewable energy already accounts for around 37% of installed generation capacity, according to the draft NEP

■ By 2047, over 80% of capacity and nearly two-thirds of electricity generation are expected to come from non-fossil sources, increasing the need for a more flexible grid

■ Battery storage costs have fallen to around ₹4 per unit from ₹10 in 2013

■ CEA estimates that 5.8 lakh crore will be required for pumped-storage projects till 2035-36

to come from non-fossil sources, increasing the need for a more flexible grid. The challenge is already emerging in some parts of the system.

The Central Electricity Authority's road map for pumped storage says wind and solar curtailment is being witnessed in some areas, even though the two sources currently account for around 25% of total energy requirements. Without adequate storage, the CEA has warned that curtailment could become more pronounced as renewable generation expands. "The proposed flexibility reflects a shift from simply adding generation

capacity to managing how large new loads such as data centres and green hydrogen interact with the grid," said Alekha Datta, director, electricity and renewables division, The Energy and Resources Institute (TERI). However, the near-term concern for data centres and green hydrogen is potentially higher upfront cost and operational complexity if storage or demand flexibility becomes mandatory.

Vibhuti Gang, director, South Asia, IEEFA, said flexibility requirements could encourage large consumers to install on-site batteries, adopt smart energy-management systems

Spot power price crashes from ₹10 to 1 paise in hrs

SAURAV ANAND
New Delhi, September 24

REAL-TIME ELECTRICITY PRICES collapsed to just 1 paise per unit on Thursday morning from ₹10 per unit at midnight, as heavy selling in the eastern region and rain-induced demand weakness in the South abruptly flipped a power market that had remained tight through much of September, data from the Indian Energy Exchange (IEX) showed.

The first two trading blocks after midnight had cleared at ₹10/unit, but prices subsequently crashed to near-zero levels in the morning. The weakness persisted through much of the day, with RTM prices largely staying at only a few paise per

unit across several trading blocks. For Thursday, the average market clearing price (MCP) in real time market (RTM) stood at ₹2.52/unit, reflecting the sharp correction during the day. Across the first 36 trading blocks, 83.24 million units (MU) of electricity were traded at an average price of ₹3.42 a unit.

"The sharp RTM price compression reflects a regional mismatch between power availability and demand rather than a broad-based system shortage," said Alekha Datta, director, electricity and renewables division, The Energy and Resources Institute (TERI). The collapse is striking because the market has been moving in the opposite direction throughout this month.

and shift loads through time-of-day tariffs. "This can help distribution companies integrate more variable solar and wind generation, reduce peak-hour grid stress, improve frequency stability, and minimise renewable energy curtailment," Gang said. However, she added that managing flexibility at the individual consumer level "could also mean significant upfront investment in battery storage and smart power-management systems for large consumers."

The draft NEP also proposes expanding ancillary services that help maintain grid balance and stability through market-based competitive procure-

ment. Consumers could participate through demand response. It also proposes time-of-use tariffs, beginning with industrial and commercial consumers.

"Grid flexibility is critical for India to integrate large volumes of renewable energy while maintaining the reliability and stability of the power system," said Anujesh Dwivedi, partner, Deloitte India. Consumers, he said, could respond by adjusting their consumption, using stored electricity instead of drawing from the grid, or feeding surplus power back into the system. The ministry has sent the draft policy to the Cabinet for an inter-ministerial discussion.

All states, UTs to issue labour code rules by Oct 31

SHUBHAM RANA
New Delhi, September 24

THE CENTRE EXPECTS all states and Union territories (UTs) to publish rules for the new labour codes by October 31 for them to take effect, Labour Secretary Chandra Bhushan Kumar said on Thursday.

Barring one state, all other states and UTs have pre-published the rules where they invited suggestions and feedback from stakeholders, Kumar said. So far, 10 states and UTs have published the final rules, Kumar said at a seminar on the new labour codes organised by the PHD Chamber of Commerce and Industry. While Kumar did not name the state yet to pre-publish the rules, he said the Union labour ministry is discussing the issues with the state and these should be resolved soon.

"I had a personal meeting with all the states and UTs, and we are hoping that by October 31, we will have these rules at the state level," the labour secretary

said. The Centre notified the final rules under the four labour codes — Code on Wages 2020, Industrial Relations Code 2020, Code on Social Security 2020, and Occupational Safety, Health and Working Conditions (OSH) Code 2020 — in May. These codes, which subsumed 29 existing labour laws, were notified in November. Kumar said the ministry will release "master FAQs" on the new labour codes in the coming days, addressing several issues and queries from stakeholders. The labour secretary also said a committee to set a statutory national floor wage has been formed and discussions with states and stakeholders are underway.

Report flags lower compliance

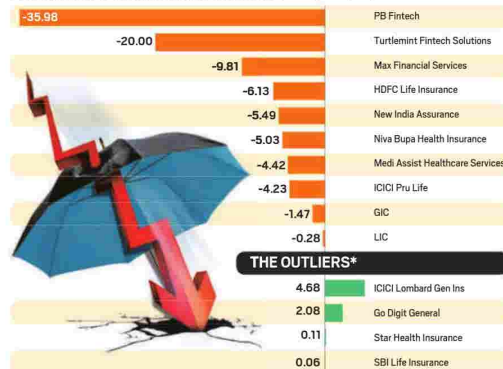
Ten months since the implementation of the four labour codes, organisations face lower compliance but practical challenges, according to a report by Grant Thornton Bharat released on Thursday. The report flagged areas where the government needs to provide more guidance to the industry such as overtime coverage and leave policy. "While the first 10 months have been marked by significant regulatory progress and implementation readiness, organisations continue to face practical questions as they translate legislative provisions into day-to-day business processes," it stated.



IRDAI PROPOSAL ON INSURANCE DISTRIBUTION REFORMS

PB FINTECH LEADS SHARE SELL-OFF

Performance of insurance, fintech stocks (% change on Sept 24)



Source: BSE

* Shares of those with lower exposure to commission income or lower expense of management ratio performed better. Go Digit has low reliance on bancassurance and largely relies on online distribution

Distribution landscape stares at 'tectonic shift'

NARAYANAN V
Chennai, September 24

THE INSURANCE REGULATORY and Development Authority of India's consultation paper proposing sharp cuts in insurance commissions and expenses of distribution structure could trigger a major reset in the existing distribution landscape, forcing insurers to invest in technology & agent networks, while making some existing business models unviable, industry observers said.

"We may actually see the contraction in the life insurance business over the next 2-3 years because a lot of distribution will go out of business," said the chief executive of a private life insurer. Irda's proposed effort-based commission structure seeks to differentiate payouts based on the effort involved in selling and servicing insurance. The draft, which favours agency distribution, proposes commissions of 6.25-25% of first-year



premiums for life insurance agents, compared with 5-20% of the first-year premium for brokers, bancassurance and web aggregators. For health insurance, commissions for distributors on first-time policies have been proposed at 15-20%.

"The non-agency channel is roughly about 50% of the business today. Of that, about 65-70% is banks and 30% is others. The 30% others' share would completely evaporate," the above-quoted life insurer said. Emkay Research said the proposed distribution reforms

would push the insurance sector into "uncharted waters" while the intent behind the reforms could be to address the root causes of mis-selling and make insurance more affordable, the sharp reduction in distribution commissions could make insurance distribution unviable and the profession less attractive, it said. "This proposal pushes the sector in uncharted waters by almost cutting the oxygen (commission) supply to this 'push sector'," Emkay said.

A bank-backed private life insurer described the proposed changes as a "tectonic shift," saying insurers would need to reassess the assumptions underpinning their existing business models. "We'll have to go back to our shareholders. We have to go back and understand the basis of the business when we started. What were the assumptions of these models?" the executive said, adding insurers have only two years to comply with the EoM framework.

Commission caps to eat into income of banks & NBFCs

KSHIPRA PETKAR
Mumbai, September 24

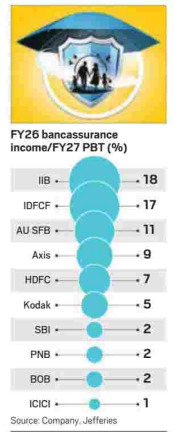
BANKS AND NON-BANKING financial companies (NBFCs) could see pressure on insurance distribution income if the insurance regulator's proposed limits on commissions and management expenses are implemented, leading to a higher dependence on bancassurance and credit-linked insurance likely to be more affected.

Irda has also proposed curbs on incentives paid to employees for selling insurance and a ban on forced bundling of insurance with loans. "This will be a tad negative for banks' bancassurance fees, especially credit-protect premiums, as it's mostly single premium with high commissions," Jefferies said in a note.

It said IndusInd Bank (18%) and IDFC FIRST Bank (17%) have relatively higher exposure, based on insurance commission income as a proportion of normalised FY27 profit. ICICI Bank and Public Finance Bank have relatively lower exposure, it said. Post the announcement, shares of banks and NBFCs tumbled.

India's leading private and public sector banks earned more than ₹20,000 crore in brokerage and commission in FY26. HDFC Bank earned ₹5,688 crore in commission and fee income from life insurance distribution and another ₹1,239 crore from health and general insurance products. ICICI Bank and Kotak Mahindra Bank reported incomes of ₹3,700 crore and ₹1,075 crore. SBI earned ₹2,795 crore in insurance commission, largely from distributing products of its subsidiaries. "Definitely there will be some impact. It shouldn't be too much for us," a senior SBI official said. "However, lower commission payouts could affect business volumes, as insurers may have less flexibility to incentivise agents and other intermediaries," he said.

FEE FACTOR



Source: Company, Jefferies

JM Financial estimates that insurance income across its bank coverage increased to 5.1% of profit before tax (PBT) in FY26 from 3.5% in FY23. As a proportion of average assets, the income increased to 7 basis points (bps) from 4 bps over the same period.

For NBFCs, the impact could be more significant because of their high concentration in loan-linked group credit-life insurance. About 93% of this business was group credit-life insurance linked to loans, JM Financial said. "The combination of differentiated commission caps, restrictions on employee incentives and the proposed separation of insurance from mandatory loan approval could put pressure on insurance-led fee income for NBFCs," Motilal Oswal Financial Services said.

(With inputs from Christina Titus)

Smaller and new firms likely to bear the brunt

● Move will lead to oligopoly & lower competition, fear industry players

NARAYANAN V
Chennai, September 24

THE INSURANCE REGULATORY and Development Authority of India (Irda) itself found variations in commission rates across products and lines of business, along with a uniform limit on management expenses, could push the industry towards an oligopolistic structure, giving a competitive advantage to large insurers, some industry players fear. They feel that the simultaneous caps on commissions and management expenses could constrain smaller insurers and newer entrants from spending adequately on customer acquisition during the growth phase.

"My big fear is that the industry will become an oligopoly because only people with a very large renewal book will be able to make the cut," said the chief executive of a life insurer, requesting anonymity. The Insurance Regulatory and Development Authority of India (Irda) itself found variations in commission rates across products and lines of business, along with a uniform limit on management expenses, could push the industry towards an oligopolistic structure, giving a competitive advantage to large insurers, some industry players fear. They feel that the simultaneous caps on commissions and management expenses could constrain smaller insurers and newer entrants from spending adequately on customer acquisition during the growth phase.

"That's because smaller players and new insurance companies need to pay a lot more upfront

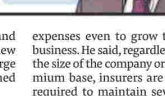
AT RISK

■ Smaller & new players need to pay a lot more in commissions than large brands to acquire new clients and to attract & retain agents

■ The expense-to-GDP ratio of a large general insurer with 10% market share was 23% in FY26, compared with 40% for insurers with less than 1% market share

KRISHNAMOORTHY RAO,
MD & CEO, GENERALI CENTRAL

Having same EoM limit for all players may not be right approach, as smaller and mid-sized insurers may have to incur higher expenses even to grow business



commissions to attract and retain agents and acquire new clients compared with large brands that have established books," said the insurer.

Irda's draft paper also showed the ratio of total expenses to gross direct premium income (GDP) varies significantly between large and small insurers. For instance, the total expense-to-GDP ratio of a large general insurer with a 10% market share was 23% in FY26, compared with 40% for insurers with less than 1% share.

Krishnamoorthy Rao, MD & CEO, Generali Central Insurance, said that having the same expense of management (EoM) percentage for all players may not be the right approach, as smaller and mid-sized insurers may have to incur higher

expenses even to grow their business. He said, regardless of the size of the company or premium base, insurers are required to maintain several mandatory functions to meet regulatory requirements, including compliance, actuarial, secretarial, and legal functions, in addition to the manpower required for insurance.

A senior official at a private life insurer said on condition of anonymity: "What is the incentive for somebody new to come into the country and set up a new sort of business? I don't know." He added that insurance investors look at this flip-flop every year. "The critical part is that much of the plans with which newer players may have come in will go for a toss now," said an industry veteran.

The impact could be particularly significant for lower-ticket motor insurance. Indraneel Chatterjee, COO and co-founder of insurance broker, bancassurance and web aggregators, said it would be difficult to sustain a distribution network for lower-value policies, potentially making the segment less attractive to front-line distributors. Chatterjee also said third-party motor insurance is distributed largely on the strength of its commission. "If that commission goes away, the number of uninsured vehicles on the road, already almost 60% in the two-wheeler segment, is likely to rise further."

Online distributors may rejig biz model

NARAYANAN V
Chennai, September 24

ONLINE INSURANCE DISTRIBUTORS and web aggregators such as PB Fintech, Turtlemint and InsuranceDekho could face a margin squeeze under the proposed commission reforms. Experts warn that lower commissions could put existing business models under strain.

"We see this as a risk for distributors like PB Fintech and Turtlemint, noting a 10% cut in new business commission rates translates to a 10-12% fall in their earnings," Jefferies said. The brokerage added that insurers

have limited scope to compensate distributors through operating expenses, as Irda has proposed caps on overall expenses of distribution, while treating payments to distributors as commissions.

The proposals triggered a sharp sell-off in listed insurance distribution platforms. According to Emkay Global, the business model of PB Fintech, the parent of Policy Bazaar, could come under pressure from sharp cuts in health renewal and porting commissions, first-year term life commissions, and motor own-damage and third-party fees.

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Opinion

FRIDAY, SEPTEMBER 25, 2026



REGULATORY RISK

Zerodha Co-founder and CEO Nithin Kamath

I keep saying this: for any regulated business, the biggest risk is regulatory risk. Today's IRDAI draft on insurance commissions is a good reminder

Cap, don't cripple

IRDAI is right to curb excessive payouts, but the remedy shouldn't undermine the very industry being reformed

THE INSURANCE REGULATOR is right to worry about the high cost of selling insurance, but its proposed remedy marks a sharp reversal. In 2023, the Insurance Regulatory and Development Authority of India (IRDAI) moved away from product-level commission controls, allowing insurers greater freedom within overall expense limits. It now proposes granular caps by product and channel, alongside tighter company-level expenses of management: 15% of gross direct premium income for life insurers within two years, falling to 12.5% in five, and 20% for general insurers. Non-cash benefits would face closer scrutiny, volume-linked incentives for bank and non-banking financial company employees would be barred, and commissions could be clawed back in cases of mis-selling. The objectives are sound. Yet the test should not be whether distributor payments fall, but whether insurance becomes better value and more accessible for policyholders across the country.

IRDAI has good reason to intervene. Insurance remains dependent on push-based distribution, with large upfront rewards encouraging sellers to chase transactions rather than suitability or long-term service. The regulator's consultation paper shows why the experiment with flexibility disappointed: between FY23 and FY25, new-business premiums for a sample of corporate agents rose 28%, while total distributor remuneration surged 125%. Corporate distributor payouts reached nearly 27% of first-year premiums, supplemented in some cases by substantial rewards. Such costs erode the value accumulated in long-duration savings policies and leave customers with poor surrender values when they exit early. Aligning commissions with premium-payment terms, renewals, and persistency could discourage churn and reward intermediaries for keeping policies in force. The proposed action against dark patterns, individual seller identification, and audits of large distributors should also strengthen accountability.

The industry's objections, however, cannot be dismissed as mere self-interest. Insurance is still largely sold, not bought, particularly outside affluent urban markets. Explaining a complex, multi-year product and servicing it afterwards requires effort, and capable intermediaries must be paid adequately. Smaller insurers without captive bank networks or large agency forces may need to spend more to acquire customers; rigid caps could therefore entrench incumbents. Low-premium and rural products may become less attractive to agents, weakening penetration where it is already poor. Digital aggregators also argue that upfront commissions finance technology, marketing, and comparison tools, and that steep reductions could damage their economics. Having first micromanaged commissions and then granted broad autonomy, another abrupt swing risks regulatory uncertainty. IRDAI should use the consultation process to calibrate caps by product complexity, ticket size, geography, and service requirements rather than impose a blunt, uniform restraint.

Most importantly, lower commissions do not automatically benefit customers. A rupee no longer paid to an agent, bank, or platform can just as easily become additional insurer profit as a lower premium or better policy value. Cost controls must therefore be accompanied by comparable disclosures, by product and channel, of acquisition costs, persistency, surrender outcomes, claims, and complaints. Insurers should demonstrate how savings in distribution expenses improve protection or returns. Remuneration should shift gradually from the point of sale towards renewals, continuing service, and suitable outcomes, while preserving incentives for last-mile distribution. Commission caps can correct excesses, but they are only a means. The ultimate measure of this reform is whether more of every ₹100 paid by a policyholder finances protection and savings, fewer customers are mis-sold unsuitable products, and insurance reaches more Indians — not whether distributor margins or insurer costs are merely trimmed on paper.

The AI folks don't seem to understand intelligence

JUST THREE YEARS after OpenAI said its models were good at grade-school maths, it announced they had solved the Navier-Stokes Millennium Prize problem in 88 hours, something that had stumped the greatest mathematical minds since the '30s. Project that trend forward and you see why OpenAI CEO Sam Altman thinks AI will cure all diseases — and why people are afraid it might harm humanity.

Santa Fe Institute scientists Melanie Mitchell and David Krakauer described AI's mantra as "scale is all you need." What that means is the bigger the training sets and the more computer you have, the better AI becomes. Altman's vision of AI's exponential growth curve, and the related hopes and fears, are similarly driven by an unspoken assumption that intelligence is all you need. If you're smart enough, you can cure cancer — or destroy the world. But that's not how power and intelligence work.

Anthropic says Claude, its AI model, already writes more than 80% of the code that engineers merge. Push that to 100% and AI would be building itself. That's why success is it could keep racing ahead until finally it understood everything and could control everything. That's the fear and, for some, the hope. AI could create what Anthropic CEO Dario Amodei calls "a country of geniuses in a data centre".

The US ran that experiment at Los Alamos. It put legendary physicists such as Niels Bohr, Richard Feynman, and Robert Oppenheimer to work building the atomic bomb. But Alex Wellerstein, a historian of science and nuclear weapons at the Stevens Institute of Technology, calculates that Los Alamos accounted for just 4% of the Manhattan Project's almost \$2 billion cost; 80% of the budget went to plants in Tennessee and Washington that produced uranium and plutonium. In his 1945 Congressional testimony, Oppenheimer said that without scientists there would have been no bomb, but "if there had been only scientists, there also would be no atomic bomb".

Intelligence needs input. The faster and clearer the input, the more powerful the output. But intelligence also needs limits. Intelligence, and weather forecasting? Check. Financial markets qualify, too. Writing fails the tests, hence the deluge of AI slop on LinkedIn. So does curing cancer, because it requires experiments on living systems that take years to respond. Intelligence might improve your hit rate, but it can't get you around that limit. Intelligence gets used first in the places with the fastest and clearest feedback. What's left are problems where it's worthless. That's why intelligence is unlikely to keep climbing. The more you know, the harder it becomes to learn even more. Research-heavy industries show the same pattern. In semiconductors, Stanford University economist Nicholas Bloom and three co-authors found doubling chip density takes more than 18 times as many researchers now as in the early '70s. Tom Davidson and Tom Houlton of the research group Foresight, whose model gives roughly 60% odds that fully automated AI research will compress three years of progress into one, assume the returns fall off software near its limits.

So when Amodei predicts that powerful AI could compress 100 to 1000 years of biological progress into five to 10, and that reductions of 95% or more in cancer deaths and new cases seem possible, scepticism is appropriate. The key question, one AI leader wrote, is how much progress each additional increment of intelligence buys, and which other inputs become the constraint when intelligence is plentiful. That leader was Amodei himself, in his 2024 essay "Machines of Loving Care." In the same essay, he noted that today's particle physicists have no shortage of theories but lack the accelerator data to choose between them, and it's not clear superintelligence would change that. Other Anthropic researchers noted that Andrii's Law dictates speeding up one part of a process tends to move bottlenecks, not eliminate them. They even forecast that this would apply to a world dominated by self-improving AI.



GAUTAM MUKUNDA

EVP, Elara Capital

ACCREDITATION FRAMEWORK

SEBI HAS FIXED THE APPARATUS WHICH HOWEVER PAYS THE MANAGER, NOT THE INVESTOR

A certificate in search of an aim

SEBI HAS FIXED the plumbing of accreditation and left the more important question unasked. Its consultation paper of August 13 carries ten proposals on the accredited investor framework. Every one of them is about who qualifies and how they prove it. Not one is about what accreditation is worth once you have it.

The diagnosis in the paper is correct, and the repairs are sensible. Accreditation arrived in 2021 and has barely been used. Sebi records 3,820 accredited investors as on July 31, against an alternative investment fund (AIF) investor base of roughly one lakh. Anyone who has taken a client through the process knows why. Two accreditation agencies operate. The cost is real, the validity is short, and few wealthy families enjoy handing their financial statements to a third party for the privilege of renewing next year.

So the paper proposes a securities market assets route, ₹5 crore for individuals and ₹20 crore for body corporates, verifiable from a depository statement rather than a chartered accountant's certificate. It proposes to let the manager of the investment product determine accreditation at onboarding, valid for three years across the manager's group, with the agency route surviving alongside for investors who want portability. It extends deemed accreditation to all persons resident outside India. By Sebi's own estimate, the securities assets route alone could make about four lakh investors eligible. These proposals should be supported.

But notice what the ten share. They all widen the gate. None of them

touches what lies beyond it. The framework did not fail because the gate was in the wrong place. It failed because for most of its life there was very little on the other side worth the walk.

That has begun to change, and the direction of the change is instructive. Sebi created a separate class of accredited investors only funds through the Third Amendment to the AIF Regulations, notified on November 18, 2025, and cut the minimum ticket for a large-value fund from ₹70 crore to ₹25 crore by its circular of December 8, 2025. Now read the relaxations. The National Institute of Securities Markets certification requirement for the manager's key investment team falls away. Accredited investors are excluded from the count for the 1,000-investor cap. *Pari passu* rights can be waived and side letters written. The scheme can run five additional years instead of two. In a large-value fund, the standard placement memorandum template and its annual audit go as well. Every one of those is a relief for the manager. Not

one is a right the investor did not have the day before he was accredited.

The numbers make the point. There were 649 accredited investors in July 2025 and 3,820 in July 2026, a near sixfold rise in the year the accredited investors' only fund arrived. Investors accredit themselves when accreditation buys something. They do not want the certificate. They want the product on the other side of it.

Sebi has said more than once that its long-term vision is to move from the minimum commitment threshold to accreditation status as the primary measure of sophistication, and that the two metrics will co-exist for now to avoid disruption. That was the position in August 2025. It is still the position in August 2026. For now, it carries a great deal of weight in a sentence that has not changed in a year. A paper devoted to overhauling accreditation was the natural place to say when the transition happens. It does not.

The paper does ask, in terms, whether securities market assets are an

Sebi's proposed safeguards — an accreditation policy at the manager level, record maintenance, and independent verification — are the right instinct. They need a sanction behind them

has not changed in a year. A paper devoted to overhauling accreditation was the natural place to say when the transition happens. It does not.

The paper does ask, in terms, whether securities market assets are an

appropriate criterion for sophistication. They are a better proxy than net worth and still only a proxy. All three routes measure wealth. A retired promoter sitting on ₹5 crore of a single scrip qualifies; a derivatives trader with ₹50 lakh and 15 years of scars does not. Every jurisdiction that tests at a wealth test has been pushed to supplement it. The US Securities and Exchange Commission added holders of the Series 7, 65, and 82 licenses, and knowledgeable employees of private funds, to its definition in August 2020. India is refining its wealth test at the moment others are looking past one.

On manager-led accreditation, the objection is obvious. It places the certification of sophistication in the hands of the person who earns a fee on the onboarding. Sebi's proposed safeguards — an accreditation policy at the manager level, record maintenance, and independent verification — are the right instinct. They need a sanction behind them. Sample audit of manager accreditations by the accreditation agencies, with consequences in registration terms for a pattern of only certified investors, would supply one.

The proposals deserve support. They are the right repairs to a process that plainly needed them. But Sebi has answered the question it set itself and avoided the one that matters. A gate is worth only as much as the room behind it, and that room is at present furnished for the manager. Until the minimum commitment threshold goes, accreditation will remain a certificate in search of a purpose.

Views are personal

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Cost-of-living debate has a blind spot

Daily mobility costs take a toll; shared mobility can give commuters an alternative when fixed routes or other modes may not work as well

MOBILITY IS a major recurring household expense, but India's cost-of-living debate rarely treats it that way. The discussion tends to focus on the cost of living in a particular place, rather than the cost of getting from one place to another. The Household Consumption Expenditure Survey shows that conveyance accounts for 7.59% of monthly per-capita expenditure in rural India and 8.46% in urban India. For a household, each journey is a recurring cost and a vehicle is the only practical way for people to access economic opportunities without owning a vehicle.

The fare is only one part of that cost. A commuter may need to pay to reach a bus depot, metro, or railway station, pay for another ride after getting off, spend an hour in traffic, or decide that owning a vehicle is the only practical way to complete the journey. The question is not whether an individual bus or metro ride is cheap. It is what the entire journey costs in money and time.

The time involved in making a journey is itself an economic cost. The ministry of statistics and programme implementation's Time Use Survey 2024 found that men aged 15 to 59 years spend an average of 77 minutes daily in commuting for employment activities. For women in that age group, the average is 67 minutes.

Traffic adds another layer to the cost. The Economic Survey 2025-26 cites the TomTom Traffic Index 2024, which estimated that commuters lost 117 hours to rush-hour traffic in Bengaluru, 103 hours in Mumbai, and 76 hours in New Delhi. It cites another study that estimated traffic-related late arrivals cost Bengaluru around

7.07 lakh productive hours in 2018, equivalent to an estimated ₹11.7 billion in lost productivity. The figures use different measures but point to the one problem: congestion imposes a measurable economic cost beyond the money spent on the journey.

This directly affects people. A job may be technically reachable but impractical if the journey takes several hours. This applies to education and essential services.

Another erstwhile inaccessible part of a city or region within a reasonable commute, more jobs become viable. The Namo Bharat corridor between Delhi and Gurugram illustrates this. Early accessibility estimates cited in the Economic Survey suggest that around 6.9 to 7.6 lakh jobs between these locations are within one hour.

However, the benefit of fast rail connectivity does not begin when a passenger enters the train or end when they leave it. People still have to reach the station at one end and get from the destination station to work, college, or an essential service.

Bengaluru offers a recent example. In March, its transport corporation introduced feeder services connecting residential areas on the Yellow Line. The services cost ₹6-25 and ran every 35 to 40 minutes. These areas had previously lacked direct bus connectivity, leaving some residents dependent on cars and two-wheelers even for short trips.

A low-cost metro ride has limited value if reaching the station requires an expensive, inconvenient, or time-consuming connection. The same applies at the other end of the journey. Public transport becomes more useful when people have affordable ways to connect to it.

This is a wider limitation of public transport. The ministry of housing and urban affairs of India recommends 40 to 60 buses per lakh population, while the Economic Survey notes that the metro fleet at about 47,650, with nearly 61% concentrated in nine megacities. Even where a city has a metro, bus, or regional rail network, fixed-route public transport cannot provide a door-to-door service from origin and destination.

This is where different modes can work together. A commuter might use a shared two-wheeler to reach a metro station, take the metro for the bulk of the journey, and use another connection at the destination. A private vehicle provides a different combination of cost, travel time, and flexibility. The relevant comparison is therefore the complete journey, what does it cost, how long does it take, and does it require the household to own a vehicle.

The value of public transport ultimately depends on the journey it enables, from a person's starting point to their final destination. First- and last-mile connections are part of that affordability equation. A transport net-

work becomes more economically useful when people can combine its different modes to reach work, education, and essential services without having to own a vehicle simply to bridge the gaps between them.

Consider a commuter living three kilometres from a metro station and working four kilometres from the station at the other end. The metro may be the most affordable way to cover most of the journey, but the commuter still has to make those shorter connections to their destination. Walking may add substantial time. Taking an individual auto-rickshaw for both legs can raise the daily cost. Owning a motorcycle or car adds the costs of purchase, fuel, maintenance, parking, and insurance.

Shared two-wheelers offer another way to make those shorter connections without requiring the passenger to own a vehicle. For some journeys, it may offer a practical balance of cost and travel time. For others, walking, buses, or autos may make more sense depending on distance, availability, and the time of day. Thus, the case for shared mobility is not that it should replace public transport, or that it is cheaper. Its role is to give commuters another option where fixed routes or other modes may not work as well for a particular journey. The Economic Survey 2025-26 recognises this, calling for greater use of shared and point-to-point modes, including bike taxis, alongside public transport to address first- and last-mile gaps.

For households, that choice matters because every journey has a cost. Making more ways to complete that journey available can reduce the need to own a vehicle simply to get around the city.

LETTERS TO THE EDITOR

Low wage levels hinder growth

Apropos of "The wages of growth" (FE, September 24), policymakers have wasted decades by considering only the production and profits side of the coin, forgetting the simple fact that in the absence of demand, such metrics and growth are rendered futile. The protesting workers in Noida earlier this year demanded an increase in

wages from a level of survival to sustenance. Say a worker supporting a family of four pays ₹4,000 in rent and a spends a similar amount on fuel alone, while having to make do with monthly wages of ₹12,000. This is akin to slavery. The economic growth that we keep talking about only pertains to consumption by the affluent section, which knows no seasonal setbacks. A higher wage is the exclusive privilege of the organised sector,

which forms hardly 6-8% of the entire workforce. Labor is the most flexible component of all inputs. The government, therefore, also views growing unemployment as a tool to reduce workers' bargaining capacity and help investors earn more profit. Such growth without a parallel growth in demand is like a house of cards. The national level floor wage that stands at ₹178 also offers no solution.

—AG Rajmohan, Anantapur

Correction

The opinion column titled "Let's financially equip gig workers" (FE, September 22) mentioned that the Atal Pension Yojana crossed 900 million gross enrolments in April. The correct figure is 90 million. Also, there is a Budget commitment to cover roughly 10 million gig workers, not ₹1 crore as stated in the column. We sincerely regret the errors.

Write to us at letters@expressindia.com

Why not let schoolteachers just teach?



CHEAP
THRILLS
NISHA
SUSAN

What does the management of crop stubble burning have to do with algebra? What do ration cards have to do with nouns and verbs? How is the census related to the Battle of Panipat? If at this point, you thought I am going to plunge you into some TED talk-style interdisciplinary exposition, you are going to be disappointed. (Or relieved, I don't judge.) Stubble-burning management, census enumeration, ration cards are only three of the many complex non-academic tasks assigned to government school teachers in Punjab. And those teachers, they are done with all the extra homework.

In September, several teachers' unions in Punjab demanded that the government stop assigning them non-academic duties. "Stop giving us these jobs because we are going to stop doing these jobs," is a summary of the memos and protests that have kicked off. I have to admit stubble-burning management is what gave me pause, but why should that be less "normal" compared to what we are familiar with: election duty.

Depending on which state you work in as a government schoolteacher, you may be asked to do anything from a drug census to data verification of beneficiaries for new government welfare schemes.

In September, the new duty that actually turned out to be the final exam for teachers' unions in Punjab was being told to drop whatever they were doing to verify applications for new ration cards under the state government's "Meri Raso" scheme. Already the "regular" work around elections has become onerous as every constituency gets SIR-ed within an inch of its life. In July, two government schools in Delhi (one in Bhalasa and one in GTB Nagar) found that their entire permanent teaching staff had been assigned as Booth Level Officers for SIR. In the Bhalasa school alone, as *The Times of India* reported then, it meant 15 substitute teachers had to manage 1,200 students across 22 sections. I was good enough at math in school to know that this is a calculation that ends in fractions. Some other schools had not been asked to send even one volunteer, the report said. At least the process is consistently arbitrary in its life-changing, democracy-squashing aesthetic.

The meagre honorariums (that have ranged from ₹2,000 to ₹2,000 across the phases) haven't made any variety of Booth Level Officer feel particularly great, given that their regular workload grows mountainous in the background. As *The News Minute* reported in July, ASHA workers assigned SIR duty in Karnataka and Telangana said they were physically exhausted and the honorarium barely paid even for the commutes demanded by this job—grassroots detective plus genealogist plus scribe plus therapist. The state already expects ASHA workers to do a million critical jobs (even before SIR with love we were dreamt up) but they continue to be temporary workers. In early Sep-



Special Intensive Revision (SIR) forms being filled at a camp in Noida, 2025.

HINDUSTAN TIMES

tember, some ASHA workers in Telangana were taken into police custody when they organised a protest against their precarious pay and job security.

For teachers recruited as BLOs, there is also the tooth-and-fang-filled school calendar that marches relentlessly towards internal and final exams. If you are into messy storylines, please look up the PIL filed in July in Delhi high court

As a government schoolteacher you may be asked to do anything from a drug census to data verification of beneficiaries for new state welfare schemes.

that challenged the deployment of schoolteachers for SIR. Spoiler alert: It ends with the court ruling that the Election Commission can continue to assign election duties to teachers but they must avoid "unbearable" stress.

I was mesmerised by the elasticity and bounciness of this adjective. Reports in August say Delhi teachers are still working backbreaking 11-hour

days without compensation.

Since I kidnapped you Ancient Mariner style with a story from Punjab, let's go back there for a bit. On the day I wrote this column, the Union government told the Lok Sabha that Punjab lags behind the national average in unemployment and has disproportionately high joblessness among the 15-29 age group.

Am I wrong in thinking that governments (particularly ones that want gantuaan, illogical capital-shifting tasks done a la Tughlaq) should put their money where their mouth is and hire qualified, unemployed people to do these temporary jobs? Around the world, countries hire and pay poll workers properly, if not extravagantly. We could do that too. We could also make the ASHA workers who are already trained to do a million tasks calendar *devis*-style, permanent. In such a scenario, a government would have to actually have a realistic line item in their budget for staff and not just the puffy clouds of national interest and duty.

Next year, India turns 80. As Dutt Lipa sang (not in Punjab) "training season's over."

It would be great if governments had to pay to pursue—I am going to be polite—their passion projects. They could stop going back to the same well again and again—like that one uncle in the family, that one quiet woman in the office who gets penalised for their competence. They could let schoolteachers do the national duty they were originally hired for.

Nisha Susan is the author of *The Women who Forgot to Invent Facebook and Other Stories*.

Getting to the meat of the matter

In his new book, Bruce Friedrich makes a case for alt-meat, which could create jobs in India, while ensuring global food security

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Bruce Friedrich, 57, does not want you to stop eating meat. Instead, as founder and president of the Good Food Institute (GFI), a US-based non-profit working on alternative proteins, he wants people to look at how meat is produced.

When Friedrich founded GFI in 2016, his aim was to create a conversation around plant-based and cultivated meats, the latter being meat grown from animal cells in a controlled environment. It was a technology-led approach, one that offered people the option to choose them for the same reasons they choose conventional meat. Climate change, food security, public health and animal welfare have since then remained central to his work.

Friedrich's own relationship with meat has changed over the years. Growing up in Oklahoma, his family ate it every day, and often with every meal. "The first time somebody told me they didn't eat meat, it felt like they had just said they didn't breathe oxygen," he says in an email interview. But in 1987, he stopped eating it.

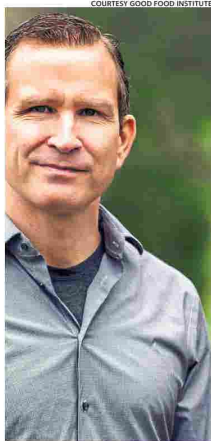
The book, *Diet for a Small Planet* (1971), by Frances Moore Lappé changed the way he thought about meat—how a large share of crops grown to feed livestock could be used to feed people instead, raising questions on nutrition and food security.

In his new book *Meat*, Friedrich makes a case that something as delicious as meat can be produced differently—at a lower cost, while creating jobs, improving food security and reducing some of the harmful effects of modern meat production, like deforestation, climate change, hunger and malnutrition. The book comes at a time when the conversation around meat and how we consume it is changing in India.

Friedrich was in Delhi last month to attend the AVIN Global Conference, a network of philanthropists, organisations and policymakers to share ideas on social and environmental issues. Edited excerpts from the interview:

How is 'Meat' relevant to an Indian reader, especially since meat consumption in the country is tied not only to climate and nutrition, but also religion, caste, politics and regional identity?

India could play the role for alternative meat that China has played for renewable energy and electric vehicles. It is perfectly placed to be a manufacturing powerhouse for both cultivated and plant-based meat. That could bring in tens of billions of dol-



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lar-fetched. What do you think it will take to make that shift?

The idea is not to convince Indians to switch from whole-food vegetarian diets to plant-based meat unless they are looking to increase the quality and amount of protein they would like to consume. The really big play for India with alternative proteins is the economic and job benefits, and the increased opportunities for farmers. That said, it is also true that about 80% of Indian adults consume some form of meat, and the UN Food and Agriculture Organization projects that India's demand for poultry meat alone could increase by 850% over the next 15 years.

We've already seen Indian companies adapt alternative protein formats into *kebabs, keema, biryani*, and more. Taste, price, and nutrition continue to drive adoption, and as products improve and prices fall due to more robust supply chains, consumers are likely to follow.

You've mentioned alternative meats can create a new market for farmers. What would that look like on the ground?

India is the world's largest producer of pulses and millets and the fifth-largest producer of soybean, all of which can serve as inputs for alternative meats. The agricultural sector can move beyond selling these as raw commodities and convert them into high-value for both domestic nutritional needs and export.

This is similar to how China's decision to lean on solar infrastructure and EV battery raw materials and production generated jobs across the country. With alternative meats, India could supply both the raw inputs, which would generate new markets for farmers, and it could also lean in on manufacturing, which would create jobs and increase wages in rural communities where wages have been flat. Plus, a reliable supply chain for these products could help farmers diversify away from resource-intensive crops such as rice and wheat while creating higher returns.

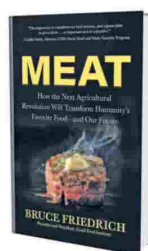
Another promising avenue is the use of agro-industrial sidestreams (such as underutilised residues from rice, wheat, cotton, sugarcane, and maize cultivation) for feedstocks in fermentation-derived proteins or cultivated meat, which can provide farmers with additional income streams beyond harvest.

Finally, favourable procurement policies and incentives to develop local processing capacity for pulses, legumes, and millets can create new opportunities for farmer organisations, cooperatives, and MSMEs to enter the global alternative value chain.

You don't want to tell people what to eat, but rather leave it to them to



(left) Bruce Friedrich; and midday meal at a government school in Kolkata.



Meat: How the Next Agricultural Revolution Will Transform Humanity's Favorite Food—And Our Future
By Bruce Friedrich, Simon & Schuster, 320 pages, \$29.95

make that choice for themselves. Why was that important to you?

First, global meat and fish consumption has set a new record every year since 1961, through decades of smart, well-funded advocacy telling people to eat less of it. If persuasion worked at scale, we'd have seen it by now. Second, person-by-person dietary change is a lot like person-by-person advocacy on behalf of decreasing energy consumption or driving less. Those things may have value, but they're not how you solve global problems. Finally, I wanted to de-politicise the conversation.

Diet choices are so deeply personal, and people don't want to be told what to eat. But alternative meat production methods can have absolutely massive benefits for the countries that prioritise them—benefits to economic growth, to foreign direct investment, and to food security. That requires industrial policy, not person-by-person diet change.

Has writing this book changed any-

thing about your relationship with food?

Not much, honestly. I've been vegan for almost 40 years and married to a Punjabi for 24 years; we're pretty set in our dietary ways. Lots of *chole, rajma, dal, saag, roti, pakoras, aloo, gobi*, and other traditional Punjabi plant-based foods. I also really love *chaut*.

What changed is how I think about meat. Researching the book meant deep research into questions around taste and nutrition parity, asking strangers at coffee shops and in line to board planes what they think about plant-based and cultivated meat, and so on. That made me a harsher critic than I expected to be.

I want these products to succeed, so I was really overcompensating, which was unhelpful. I no longer give them credit for just existing and now I am really pushing the plant-based meats to do better. Does it actually taste as good? Most don't. A handful do, and that handful is the number I actually care about.

GTTY IMAGES

Kedar Lele

WALKING THE TALK

Haleon India's CEO on leadership that puts people first, his love for storytelling, and accepting that he can't be superman

Illustration by Priya Kuriyan

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Once a month, the more than 1,650 employees of Haleon across India, Sri Lanka and Bangladesh receive a calendar notification asking them to join an online chat with their CEO and president, Indian subcontinent, Kedar Lele. Attendance isn't compulsory, and no one in the British consumer healthcare company is expected to get sales figures or a deck ready for presentation. These sessions, called "kandid with Kedar", are meant to be informal chitchats. In one of them, his team says, he spent time talking to his sales team with a white *gamcha* (cotton cloth) tied around his head to demonstrate how to protect oneself from the sun in the field.

Headquartered in the UK, Haleon is the successor to GlaxoSmithKline's consumer business, much of which was sold to Unilever in 2018. Today, Haleon manufactures and distributes a range of household staple brands, including antacid Eno, toothpaste Sensodyne and pain-relief balm Iodex. The India arm reported annual revenue of over ₹3,300 crore in FY25. Profits after tax stood at just under ₹650 crore, a 35% jump year-on-year.

Lele, who turns 51 this month, joined Haleon earlier this year. While the India arm is headquartered in Gurugram, he works from the Mumbai regional office. We are meeting in a conference room on the 48th floor of a spanking new Oberoi high-rise, a quiet set of offices with a few people going about their work as the Malad creek and mangroves stretch into the Arabian Sea behind them.

Haleon India reported annual revenue of over ₹3,300 crore in FY25. Profits after tax stood at just under ₹650 crore, a 35% jump year on year

Lele says he first came up with the idea of hosting candid employee chitchats six years ago, when he worked at FMCG giant Hindustan Unilever Ltd (HUL). "All of us had emotional scars of the pandemic," he says. "But we learned how to be personal despite not being in the same room. During those days, I used to do one video call with my team every week because everyone was at their homes but the sales team was still working, the factories were still churning out products. That time showed me that communication is what binds people together."

He kept at it in Haleon, initially facing sceptical and nervous colleagues who weren't sure if they should start narrating personal anecdotes in the office, much less with their top boss listening. "I strongly believe that storytelling has a huge role to play in building character. It gives meaning to conversations, and it connects us to our purpose."

Lele's point of view is unusual for a chief executive, but then he has also had an unusual career trajectory. His nearly three-decade career spans sales and marketing roles in major consumer companies, including two decades at Unilever and a more recent stint as CEO of oil company Castrol India. Lele calls his career "the road less travelled", invoking the classic lines of the poet Robert Frost. "When I look back, I sometimes have to pinch myself and see, has this really happened? Because it shouldn't have happened."

Although Lele got his MBA from the Indian School of Business in Hyderabad in 2004, his first postgraduate degree was in advertising and brand management from MICA Ahmedabad. Shortly after, he started his career as an ad executive at Mudra Communications in Bengaluru in the late 1990s. Then, he attempted to launch an adtech startup right at the cusp of the dotcom bust.

Needless to say, that failed, and Lele found himself in telecom sales with electronics company BPL for a short stint before switching to brand management with jobs portal Monster.com in 2001 right as online classifieds, including jobs listings, were aggressively moving online.

Lele says these early experiences helped shape his career, and pushed him to make challenging choices. "There have been lots of transformations in India over the last 20 years and I was lucky to have the front seat to some of them," he says. "Advertising was taking shape and the communications industry was growing and I had just joined it. Digital was coming

in and transformation was taking place and I was there in Monster." And when the rise of modern trade, and later e-commerce, changed the business of selling consumer packaged goods, Lele was at Hindustan Unilever, heading these channels as vice-president, starting 2014.

As much as he's known for being candid, Lele is also known for taking decisions against the grain. For one, Lele was never planning to be in a corporate role. He always planned to be a bureaucrat, just like his father, as he moved across the country, largely attending Hindi medium schools. An NCC cadet, Lele abandoned an engineering degree to study for UPSC exams. He was soon disillusioned with the complexities of navigating Indian bureaucracy, where getting the job done is often secondary to managing power structures.

"I started realising that the design behind his father's frequent transfer had nothing to do with his job, but everything to do with how he lived his life," Lele says. "Which was a life of integrity, and calling a spade a spade. I realised in college... I didn't want a career full of frustration." He ended up in advertising instead.

Many years later, in 2017, he was offered a chance to move to Unilever's global headquarters in London and run the global e-commerce team. At the time, he was a vice-president in HUL, leading the company's e-commerce, modern trade, and other sales channels. Instead, he opted to move to Dhaka and run Unilever's Bangladesh unit, first as chief operating officer and later as chairman and

MD. He spent four years there.

"I chose not to do it," he says, referring to the proposed move to London. "And I was asked, 'who does that?' You should be going to London. But I always felt I would be better as a conductor of the orchestra and a symphony maker, rather than playing an instrument or being a functional leader." He spent four years in Bangladesh, and also learnt the language during that time.

His next counter-intuitive move was leaving Unilever in 2024 to join Castrol's India unit as MD, India, and vice-president, South Asia. Castrol, a household name in engine oils, was a complete departure from years of selling soaps, shampoos, and ice creams. "I went to Castrol because I felt that there was a huge consumer business that Castrol had in terms of recognition," Lele says. But, the stint lasted only a year and a few months, and Lele quit late last year, planning to take a sabbatical. Instead, he landed at Haleon, which is where he says the first decision he made was walking the talk.

How should the CEO of a consumer healthcare company look and carry himself? He refers to a famous story of a businessman whose investor, remarking on his fitness, had said he could not trust a man who wouldn't take care of himself with his money.

"If I was going to stand up as the CEO of a company which is about health, would you be able to look at me and say, 'I think he must be looking after himself?' So, I had four months when building a business, and I dropped my weight to 89kg from

A book that left a big impression

'The Godfather', by Mario Puzo

A favourite show/podcast

'Chai with P', hosted by leadership trainer and author Prakash Iyer

A formative childhood experience?

Marching in the Republic Day parade in New Delhi in 1991

over 100kg. I started sleeping better. My average sleep used to be between 5.5-6 hours. I now sleep a compulsory 7 hours. I do yoga every day without fail. For those 45 minutes, I also do my meditation every day. That has made a huge difference."

Lele's next challenge is transforming the company while the lines blur in the consumer goods industry between classic FMCG and pharmaceutical companies, both attempting to woo premium Indian customers with food, beverages, personal care goods, and supplements that promise better health and wellbeing.

FMCG firms are taking their skincare goods from *kirana* stores to chemists and dermatologists' offices, while pharma companies are leaning on their medical R&D to make more over-the-counter products that can leave doctors' offices and medical stores to be sold in *kirana* stores and quick-commerce too.

Lele's challenge, and that of Haleon, is to walk the tightrope between the classic sales and marketing playbooks of FMCG and pharmaceutical companies. That is where his experience of juggling sales and marketing roles at HUL comes in handy.

Since taking over, Lele has been attempting to make Haleon's premium toothpaste brand Sensodyne more accessible. This year, the company launched ₹20 toothpaste sachets only in *kirana* shops to get price-sensitive consumers to try out the product.

Lele says keeping the consumer at the centre is crucial to any business. He draws on three things when building a business: "Intense" focus on the consumer, balan-

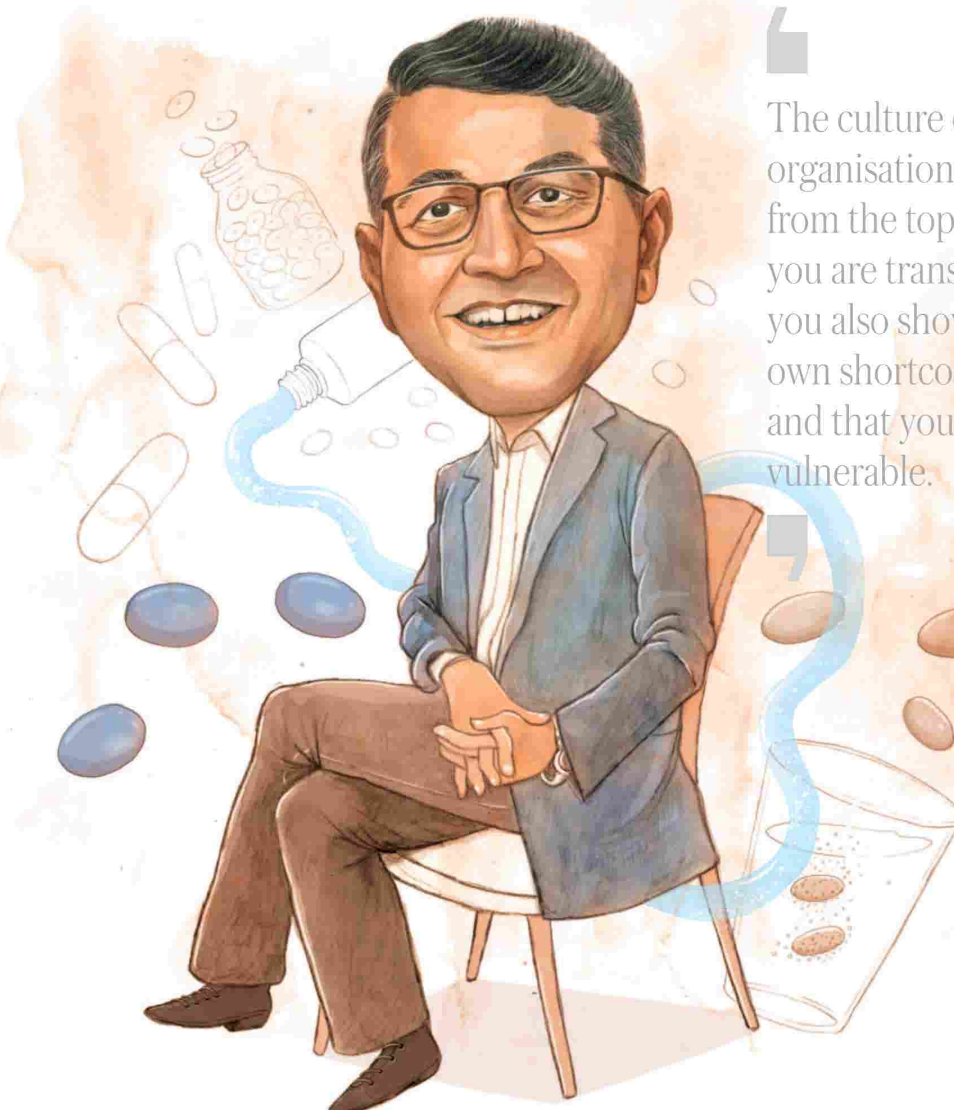
cing premium and mass-consumers, and combining great intent with great execution. Most importantly, he says, one must bring purpose to the job.

"Great purpose and great intent cannot be realised without great execution. Execution can sometimes be boringly predictable, but boring predictability is sometimes really beautiful."

Much of Lele's life has involved trading between opposites and it's been a delicate balance to retain his candid nature while being an effective corporate leader. That was a journey, too. "Some of the initial feedback I got (in corporate leadership settings) was that it seems 'you are running a popularity contest. You want to be nice to everyone'," he says.

Lele worked with an executive coach, which helped him understand how to address his tendency to want to be liked while handling senior corporate roles. "He (the coach) helped me discover that because I was changing schools so often, I was changing locations every few years, that I had the need to get accepted," he says. "You go to a new place, nobody wants you in the group, right? You will find some similarity. You will crack a joke and build that connect."

Eventually, he leaned into a version of leadership where he could balance taking charge with the transparency that someone at the top needs to set as an example. "The culture of an organisation gets set from the top," he says. "When you are transparent you also show your own shortcomings and that you are vulnerable. It is a good idea not to be a superman."



Don't hang the ECI just yet

Before deciding that the Election Commission of India has been unfair to the Opposition, we need to enable it to work efficiently and transparently



BEYOND IDEOLOGY
R JAGANNATHAN

The Election Commission of India (ECI) has been put in the dock, thanks to a report in *The Indian Express* suggesting that two of the election commissioners have had differences with the Chief Election Commissioner (CEC) on some critical issues, including the conduct of the Special Intensive Revision (SIR) of electoral rolls. While Opposition leaders, including Rahul Gandhi, have long made the alleged partiality of the ECI an issue, the *Express* report seems to give them ammunition that they previously lacked. The demand is that CEC Gyanesh Kumar resign.

While election commissioners cannot be removed unless they are impeached by Parliament, the Commission should, in the interests of its own credibility, discuss the issues raised internally and then transparently tell the public how it is conducting its business, and how it will

set things right in future. While the ECI has put out a bland statement that its decisions were by consensus, it would help clear the air if all three commissioners were to address the media and take questions both collectively and individually.

But it would also be wise to not jump to any conclusion on the alleged biases of the ECI. We have to note the constraints under which the Commission has to work to keep the machinery of electoral democracy working. It has to handle close to a billion voters with limited resources. It would be more constructive to suggest effective remedies so that snafus like the exclusion of millions of voters can be avoided. A key point to note is this: One need not assume conspiracy and unfairness in the Commission's working when complexity and occasional incompetence can adequately explain the problems thrown up in the *Express* report. Here's why.

First, the Commission has barely 550 direct employees in its secretariat in Delhi, and smaller numbers in various states, some of which are larger than entire countries. This core group can commandeer 10-12 million temporary personnel from states and other civil services during a nation-wide general election, but it is effectively dependent on state governments for the bulk of the work to run post- and pre-election work like updating voter lists and con-

ducting elaborate exercises like SIR. Inevitably, it will have to use information technology to help it, with the scale of work, and this will increasingly determine how well it can include eligible voters. When software is used to identify and throw up eligible and ineligible voters in the current list, it can lead to large-scale errors and glitches. But these errors can be corrected and the software improved in its next iteration.

Second, the figure of 130 million likely exclusions from the voter lists due to SIR has been mentioned in the *Express* report. This seems very large by any standalone measure, but it needs to be contrasted with two other numbers. The annual death rate, and the size of the internal migrant population. Up to 10 million people die in India annually, and a substantial chunk of them will be older people who will surely be voters. But the migrant population is truly staggering. According to Census 2011 estimates, some 455 million Indians are internal migrants, and this number could only be larger today.

When you migrate for work or other reasons (study or marriage), either within the state or to a different state, the chances of your being in two voter lists are high. This is because you may be registered at home and also in the places they work, and the routine work of delet-



ILLUSTRATION: BINAY SINHA

ing one does not happen.

Speaking from personal experience, I have worked in four major cities, and from 13 or 14 different addresses in these cities. I was not enrolled as a voter till I had crossed the age of 30, and in two cities (Delhi and Kolkata), I had no vote at all. In the remaining two cities, I did not formally try to delete my name or change my address when I moved, and it is likely that my name remained in some of those lists even after I had left. Any update of voter lists will have to remove my name from at least one or two places where I do not stay anymore. If this is the case with me, why would this not happen on a much larger scale among migrant workers? Few people know how to get their names deleted

when they move. Large-scale deletions are necessary to clean up the voter lists and add those who are now 18 or older.

Three, the problem could be with the software that seeks to identify duplications and the deceased. With no human oversight possible on such large databases, clearly the Commission has its work cut out in ensuring that deletions are cross-checked by someone with more common sense than a software that merely throws up "logical" discrepancies, especially when names and addresses may be misspelled badly or wrongly. In a country with such a large migrant population, there will be hundreds showing the same address as their residence. They can't all be disenfranchised without

a human recheck.

Four, one criticism of the SIR exercise is that it has found very few illegal immigrants on the voters' lists. And most of those deletions that went into appeal in West Bengal did not turn out to be illegals. But can one expect an SIR exercise to do what a National Register of Citizens (NRC) could do painstakingly?

Five, and this is a clear takeaway from the SIR issues, SIR may be vital, but trying to do it just months before a state or general election puts too much pressure on the human resources available. And when state governments decide to be uncooperative, like the one in West Bengal, which put every obstacle in the ECI's way to disrupt the conduct of SIR, the exercise cannot be done well.

This should lead us to a simple conclusion: Before an election, only summary revisions must be allowed; SIRs should be done in the five years after, before the next Assembly or general elections.

To sum up, five conclusions are mandated.

1. The Supreme Court should set clear guidelines for the conduct of ECI business, especially how it builds consensus or votes on critical issues. These should be recorded so that we know who said what in these meetings, and why some decisions were taken. We know that two commissioners did not always agree with the CEC on some issues, but we don't know whether both commissioners were against the CEC on every decision flagged by the *Express* report, or one of them agreed with the CEC, thus making a lawful majority.
2. The Commission clearly needs more permanent staff.
3. If the ECI is not to be burdened with the task of weeding out non-citizens from the voter lists, the NRC is a must. A political consensus must be built for conducting an NRC every decade, possibly midway between two Censuses.

4. Whenever SIR is done, political parties must help with the process. Whenever they did — as in Kerala and Tamil Nadu — the SIR work went smoothly.
5. To eliminate the dead, some way of using civil death registers along with the voter lists must be found.

So, before we decide that the ECI has been unfair to the Opposition, we need to start making these changes so that the Commission can indeed work efficiently and transparently.

The writer is a senior journalist

Smoke and mirrors



PLAIN POLITICS
ADITI PHADNIS

In 2023, a parliamentary panel headed by Sushil Modi, a Bharatiya Janata Party (BJP) member, had recommended reducing the age limit to contest Lok Sabha and Assembly polls to 18 from the current 25. The proposal met with pushback from the Election Commission of India (ECI), which told the panel that "it is unrealistic to expect 18-year-olds to possess the necessary experience and maturity for these responsibilities".

A few months ago, presumably riding on the back of GenZ protests, Telangana Chief Minister Revanth Reddy announced that a special session of the Assembly would be called to recommend to the Centre that the minimum age to contest Assembly and Lok Sabha elections be reduced to 21 from 25 at present and to the Rajya Sabha and Legislative Councils to 25 from the current 30, via a constitutional amendment. That session is yet to happen. His party, the Congress, has not reacted to this. But Mr Reddy is trying to create a constituency for himself despite appearing comfortably ensconced in power.

The Congress government in Telangana faces no real electoral challenge. Assembly polls are scheduled only for 2028. Barring one seat, no other by-election is due. With 76 out of the 19 seats in the Assembly, the Congress is sitting pretty, with seven members of its ally, the Majlis-e-Itehad ul Muslimeen, firmly behind it. Most local-body polls are over. The Congress has man-

aged to win around 70 percent of the seats in those elections.

The only threat is the Greater Hyderabad Municipal Corporation (GHMC) elections, restructured into the GHMC, Cyberabad Municipal Corporation, and Malkajgiri Municipal Corporation. These have been delayed by a year and have previously served as a dipstick for Telangana's urban vote. The GHMC covered 150 wards, and when the 2020 polls were held, the BJP saw the most dramatic vote share, more than doubling its vote share. The pattern repeated itself in the Assembly polls — though the BJP got only about 14 per cent of the vote share, that figure was stuck at 7 per cent in the previous two Assembly polls. True, a lot of it stood on the back of Mr Reddy, the storm clouds are gathering.

This is why some of the moves his government has made recently are so inexplicable. Hyderabad and surrounding areas have seen massive expansion in the last few decades. There are thousands of acres of genuine private patta lands and entire residential colonies were also placed on the prohibited list (22A). On the other hand, colonies were also built on land belonging to waqfs and the cantonment. In short, land ownership was a mess.

Now, Mr Reddy has announced his government will look into all these disputes and sort them out. The Bharat Rashtra Samithi (BRS), which is in the Opposition, claims this will only create a climate for insider deals, nepotism and bribery. It says the land in question is around 9.8 million acres. A small fraction is private land. By "regularising" these structures, the government will only create more litigation and an opportunity for rent-seeking.

Obviously, this will impact the GHMC polls and the general mood in the state. So, for Mr Reddy, having a fallback, a new constituency of clear-eyed young people, is important. But these things take time. And the Opposition never fails to remind voters that Mr Reddy is but a decade before he will be foisted on them. And so, even as he tries to create a new ground-level constituency, Mr Reddy has to disarm and pendental off an older generation of Congressmen. He's lucky that on that front he has no real challengers within the party.

But last time, the government armed itself with Section 22A of the Registration Act (1908), giving itself the powers to put certain lands (like government, assigned, forest and waqf lands) on the "prohibited list". Land on this list could not be registered. But during past years, the government has converted acres of genuine private patta lands and entire residential colonies were also placed on the prohibited list (22A). On the other hand, colonies were also built on land belonging to waqfs and the cantonment. In short, land ownership was a mess.

Modi and the third-year trough

On the positive side, politically, Mr Modi has no internal challenge. His party, allies, and the Cabinet are cohesive

If you promise you won't Google, I'll ask you three questions.

One, how many Chief Election Commissioners (CECs) preceded Gyanesh Kumar in the Modi era?

Second, can you recall even one?

And third, how many CECs can you remember beginning 1950?

The answer to the first is, eight. Eight CECs have served honourably and faded away in the Modi era, during which the Bharatiya Janata Party (BJP), as its 20-spokesperson acknowledged, has "lost 20 elections" and was reduced to 240 in the Lok Sabha in 2024. You'd, of course, remember T N Seshan in the nineties for how he reinvented the institution. S Y Quraishi for being so active in civilised public debate. And probably, Manohar Singh Gill. That's partly because he successfully took on Seshan's "dictatorship" along with fellow Election Commissioner G V G Krishnamurti in 1992-95, paving the way for the principle of the "three members being equal". Also, partly because Gill became a minister of state (MoS) in the Manmohan Singh Cabinet. The remaining 22 CECs quietly retired, their reputations mostly intact. As for the great institution they led, many enhanced it. Hardly anybody hurt it.

Even I, having covered politics and elections for nearly 50 years now, can recall only a handful of names — some whom I knew personally from before they became CEC, and others with whom I interacted professionally.

The first one I spoke with was R K Trivedi (June 18, 1982 to December 31, 1983). This was in the context of the disastrous election Indira Gandhi forced on Assam in the face of a violent mass boycott that consumed about 7,000 lives. Why did he railroad an election like this, I asked Trivedi. "I have to be practical," was his short answer. It became a much-quoted line.

In this preamble wading 75 years back is to put in perspective the fact that Gyanesh Kumar has now become the second-most unforgettable among our 26 CECs. He obviously didn't seek this "fame". But he can't shake it off. Nor can the Modi government disown him. However, the indications are that they'd wish to do so. Hear the sharp criticism targeting noted TV anchor Rajat Sharma, whom nobody would call an Opposition megaphone.

Gyanesh Kumar's position is among the highest constitutionally-protected positions in the country. Nobody can fire him. With the new 2023 law, he can

never be prosecuted for any action as CEC. The Opposition can threaten him, but they don't have the numbers to impeach him. If the government "persuades" him to go, political consequences will be severe, with so many elections coming up, leading up to the big one in the summer of 2029. He can stay till his term ends on January 26, 2029. It will just be a very long 27 months. The bind that the "system" is caught in is classic Lady Macbeth.

For the Modi government, this has come at a juncture that's usually troublesome in India — the third year of the incumbent. Going back 60 years to the India era beginning January 1966, every government has shown fatigue and drifted by about its third year. Only those that reinvented their politics or government were able to fight their way out of this trap.

Indira Gandhi did so by splitting her party in 1969, taking a hard Left turn and finding an ideological ally in the Communist Party of India (CPI) to match this. She won a big majority in 1971, but was in a downward spiral by 1974. Even after she returned in 1980, her government had lost direction by 1983. If Rajiv went the elections after her assassination, it was mostly because of the nationalistic surge she had already built, especially the Hindi heartland, with Operation Blue Star. Rajiv, despite his majority of 415 in a House of 545, also lost direction by 1987 and never recovered. As did P V Narasimha Rao. He had a rousing start with the 1991 reform. By 1993, his government was dead man walking, crippled by Ayodhya and Arjun Singh's "secular" rebellion.

How did Mr Modi get over the third-year hump in his first two terms? In the first, the triple highs of democratisation, Unirajul strike and Pulwama/Balakot turned the tide. In his second term, he didn't find such a dramatic turnaround and ultimately fell short of majority in 2024. This is now the third year of his third term.

Even in football, or hockey, which is more familiar to us especially in this week of the Asian, coaches know the imperative of fresh legs. The best players tire, and you need substitutes rolling in and out. Historically, tired governments have responded with Cabinet reshuffles to bring in fresh legs and to change the headlines. This government has had a sameness to it for too long now.

Externally and internally, it's facing piled-up challenges. The economy is growing, but jobs and wages aren't. Too many lightweight chief ministers are drifting. The new big bets, semiconductor, private defence production, and critical

minerals have a long lead time.

Internationally, with Donald Trump, Xi Jinping and Vladimir Putin finding the classical big power *modus vivendi*, India has a very fraught maze to navigate. The clear indications from Washington that Mr Putin is likely to be elected to this year's G20 being hosted by the United States. This opens opportunities for India, like Europe and Canada. But it also complicates things, given critical dependencies on all three big powers.

Then begins the flurry of elections: First Uttar Pradesh, Punjab, and Gujarat, followed the next year by the bellwether Karnataka, Madhya Pradesh, Rajasthan and Chhattisgarh. These are only the major states. Elections here will be held under the watch of a wounded EC, and the Opposition has its script. If it wins any state, it will say the Modi government is on its way out. If it loses, it'll insist the election has been stolen.

On the positive side for Mr Modi, politically, there's no internal challenge. His party, allies and the Cabinet are cohesive. As I wrote earlier, people might nurse ambitions, but nobody would even dare to whisper.

All of the three or four people looking at a future could not lead the BJP to win in 2029. They need Mr Modi to win a fourth term. Think Advani, Murli Manohar Joshi, Pramod Mahajan in 2003. They all wanted Valajape to win the 2004 election for them. Today's seniors will rally around Mr Modi even more strongly.

How to pull his third-term government out of its third-year trough? Mr Modi would know best. Whether it takes change, or a shuffle of personnel, or new ideas and projects, he would know. But the first priority must be to restore the respect for the EC as India's most valuable institution.

There's an exceptionalism to Indian democracy that 1.45 billion Indians so cherish — free elections, decade upon decade, even as leaders and ideologies change and go. Our democracy is a greater common good for the world, as Rahul Gandhi also acknowledged. And if it is so, and the election process sits at its very heart, who should go to defend it? It can't be left to the party spokespeople.

From Modi government and the EC's point of view, the ideal thing would've been for the three ECs to sit together, answer questions, smile at cameras and tell the nation "all is well". That it hasn't happened underlines the magnitude of the challenge. Prime Minister Modi proudly calls India the "mother of democracy". Shouldn't he be the ideal person to come out and defend the sanctity and integrity of its election process? Who knows, it may even pull his government and party out of that third-year lassitude. Unconventional calls do sometimes work in politics.

By special arrangement with *ThePrint*

India's best D2C brand has a beard



YES, BUT...
SANDEEP GOYAL

If you want to understand direct-to-consumer (D2C) business in India, stop watching *Shark Tank*. Look at a Saturday night congregation at the Isha Yoga Centre in Coimbatore. 10,000 people have paid ₹50,000 each to sit in front of a man with a flowing beard, riding a motorcycle, telling them that their

engineering degree is the reason they are unhappy. That man, Sadhguru, has a better business model than 90 per cent of the unicorns in Bengaluru.

Welcome to India's fastest growing D2C business: Spirituality.

We like to think spirituality is ancient. Actually, the business of spirituality is very, very new age. It has cracked the exact code that every D2C founder dreams of: Zero cost of customer acquisition through guilt, infinite lifetime value through fear, and a product that never has to be delivered because the customer is told the defect is in them.

Let's do a profit & loss tour of the big players.

Ramdev: The FMCG disruptor Before there was "natural" and "chemical-free," there was a man in

safran doing backbends on Aastha channel at 6 am. Ramdev understood something IBM grads didn't: Indians don't buy products, they buy purity.

He built Patanjali Ayurved in 2006 on one insight — that Hindustan Unilever was an East India Company. Actually, the business of spirituality was not toothpaste. It was distrust.

The model: Free content (yoga on TV), community (Bharat Swabhimani camps), then conversion (Dant Kanti). No ad spend. No distributor margin. Just devotion.

At its peak in 2017, Patanjali did ₹10,500 crore in revenue, bigger than Dabur and Emami combined. The pitch was perfect D2C: "MNCs loot you, we heal you."

Then the classic D2C trap — overextension, quality issues, the

strange Corneli episode during Covid, when he claimed to have cured coronavirus in a lab that didn't exist. The revenue fell to ₹6,000 crore, then bounced back after acquiring Ruchi Soya.

But look at the asset he still owns: 200 million WhatsApp forwards that act as free media. No Boast has that.

Sadhguru: Lululemon of moksha If Ramdev is the mass-market Colgate, Sadhguru is the premium athlete brand. Jaggi Vasudev doesn't sell you oil. He sells you the idea that you are broken. His product suite is a masterclass in upselling.

Top of funnel: Free YouTube videos — "5 reasons you are depressed" — 10 million views.

Middle funnel: Inner Engineering — ₹25,000 for seven sessions.

Bottom funnel: Shounya, Linga

Bhairavi consecration, Mahashivratri overnight — ₹1 lakh to ₹5 lakh.

Retention: Volunteer for free, get an identity.

He has taken a leaf from Apple. Colplay is the store, the volunteers are the Genius Bar, the bike is the product placement. The Isha Foundation claims have 11 million volunteers. That's not a following, that's an unpaid workforce that pays you to work.

Last Mahashivratri, Isha live-streamed to 200 million people. Colplay would kill for those numbers.

Colplay, he doesn't need to pay Sony Music. His music is silence.

The merchandise is genius: From soil (Save Soil movement) — raised \$50 million in global goodwill) to rudraksha beads at

₹3,000 for something you can get at Pooja Samagri for ₹50. Why does it sell? Because the receipt comes with meaning.

The Art of Living and Listening If Sadhguru is Apple, Sri Sri Ravi Shankar is Starbucks. Everywhere, consistent, slightly sweet.

Art of Living started as a breathing course in 1981. Today it's in 180 countries, with 30,000 teachers. The flagship product, Sudarshan Kriya, costs ₹3,000 in India and \$395 in the US. Same breath.

What Sri Sri perfected is franchising spirituality. Like McDonald's. He doesn't teach. His teachers teach. He certifies. That's asset-light scaling.

And the D2C extension is flaw-

less: Art of Living has incense sticks, Ayurveda supplements, a publishing house, honey, ghee, and a line of chakra-based look-alikes you are about to attend a satsang. All sold through its own stores, its own website, and its own army of devotees who would never question the margin.

During the 2016 World Culture Festival on the Yamuna floodplain, the National Green Tribunal fined Art of Living ₹5 crore for environmental damage. He paid it, raised twice that amount in donations the next month. Try doing that if you're a detergent brand.

Every D2C babe has a fishing rod. If you leave a guru, you lose your identity, your community, and your mother says you will go to hell.

The babies have built what every Venture Capital says it wants: Community-first, content-led, mission-driven brands with insane retention. Long live the babe!

The writer is chairman, Rediffusion

Sensex extends losing streak to 7 weeks on W Asia conflict

Sensex and Nifty continued their losing run for seventh consecutive week, the longest declining spree since Covid. The crude prices softened a tad but still stayed elevated, driven by geopolitical concerns

This week, at least four agencies increased their GDP growth projections for India. While Fitch estimates GDP to grow 6.9%, ADB and S&P are pegging it at 7%. OECD has projected 7.1% expansion

Source: Screener, Yahoo Finance

Forex reserves decline by \$15bn to \$766bn

Mumbai: India's foreign exchange reserves fell by \$14.9 billion to \$766.9 billion in the week ended Sept 18, according to the RBI's weekly statistical data. The decline was driven mainly by a fall in foreign currency assets (FCA), the largest component of the reserves. FCA fell by \$14.8 billion to \$631 billion during the week.

Gold reserves rose marginally by \$80 million to \$113.3 billion. Special drawing rights fell by \$106 million to \$18.7 billion, while India's reserve position in the IMF declined by \$27 million to \$4.9 billion. The weekly decline came after a period of strong accumulation in the reserves. Since the end of March 2026, the reserves are still higher by \$74.8 billion.

On a year-on-year basis, the reserves are up by \$63.3 billion. Bankers said the decline could be due to dollar sales by the RBI to support the rupee. Changes in the value of major currencies held in the RBI's foreign currency assets can also affect the reserves when measured in dollar terms. **rw**



No extra time for realising export proceeds

Mumbai: With the rupee under pressure, the RBI has ruled back an earlier move to give exporters more time to bring in export proceeds from Oct 2026. In Jan, the RBI had allowed exporters 15 months from the date of shipment or invoice to realise and repatriate the proceeds from Oct. The Sept amendment retains the existing nine month limit for future.

The RBI has made a similar change for goods exported to overseas warehouses, cutting the period from 15 months to nine months from the date of sale. For exports made or settled in Indian rupees, the timeline has been reduced to 12 months from 18 months. The Jan regulations had provided the longer 18-month window with effect from Oct. The latest amendment does not remove the flexibility available to exporters facing delays. Authorised dealers can still extend the deadline for an exporter provides reasons for the delay and the bank is satisfied with them. **rw**

Pant, Subramanian to be Irdai members

New Delhi: Govt has appointed UC managing director, Dinesh Pant and former CMD of New India Assurance, Girija Subramanian, as members of insurance regulator Irdai. **AGENCIES**

Urban travellers prefer hotels, rural dharamshalas

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New Delhi: Most urban travellers opt for hotels, guesthouses or house rentals for their stay for an overnight domestic trip, while dharamshalas remain the top place of stay for those from rural India.

A part of the reason may have to do with the fact that over three-fourths of Indians who travelled in the past year and only a third of the households went on these overnight trips, did so for medical or pilgrimage purposes. And, they still didn't spend much on travel: The average spend works out to Rs 16,200 (urban) and Rs 15,600 (rural), with the rural 64% trips lasting only up to three nights, findings from the latest domestic tourism survey by NSO showed. Usu-

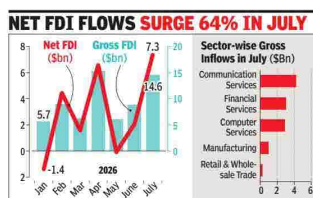
Indian eco doing well against global headwinds, says RBI

FCNR(B)-Deposit Boost For Re Eroded By Oil Price Spike

TIMES NEWS NETWORK

New Delhi: RBI on Friday said the Indian economy has performed well despite global headwinds and noted that escalation of West Asia conflict this month has resulted in a sharp increase in oil prices, reigniting fears over a build-up of inflationary pressure and further disruption in supply chains.

The central bank's latest RBI Bulletin also said strong FCNR(B) deposits helped recoveries in the rupee in early Sept, but the gains reversed in later part of the month on account of higher crude prices. It stated that high level of surplus liquidity in the system following \$133 billion FCNR(B) flows can support the ongoing credit growth, driven by acceleration in credit flow to industry. It also noted that in Aug, bank deposits grew at their fastest pace in 15 years, resulting in a moderation in incremental credit de-



posit ratio. "Despite such a challenging global environment, the Indian economy recorded a strong GDP growth in Q1 of 2026-27. High-frequency indicators through Aug reflected sustained demand, with segments of industry and services sectors displaying resilience. India's financial and external sectors are drawing strength from the real economy, although geopolitical tensions and weat-

her-related uncertainties are acting as key downside risks," RBI said in its 'State of the Economy' report. It said that most high-frequency indicators remain healthy in Aug. It, however, cautioned that rise in sovereign yields in some of the major advanced economies has put pressure on govt finances.

Gross, net FDI rise
Latest data released by

RBI estimated that net FDI jumped 64% to \$7.1 billion in July, on the back of robust gross inflows of \$14.6 billion, which was an increase of over 31% over a year ago. Communication, financial and computer services were the major sectors, receiving more than four-fifths of the equity inflows (see graphic). Mauritius, the UAE, and the US were the major source countries, accounting for about 70% of equity inflows, RBI said. During April-July, net inflows were 38% higher at \$13.4 billion, while gross FDI rose 12.6% to \$43.9 billion.

On the other hand, after declining for two months, overseas investments also rose 26% in July to \$3.4 billion. RBI said over two-thirds of outward FDI flows went to Singapore, the UK, and the UAE, with financial, insurance and business services, and manufacturing accounting for about two-thirds of the outward flows.

Self-listing of bourses feasible, says NSE chief

Mumbai: Self-listing by stock exchanges is feasible, but the decision remains under the purview of market regulator Sebi, NSE chairman Srinivas Injeti said Friday. A day after the country's largest bourse got listed on rival exchange BSE, Injeti pitched for self-listing, saying that it would allow exchanges to manage their own affairs without being subjected to the whims and fancies of the regulator. "There is no problem. But, this (self-listing) is something which is in the realm of feasibility. It is feasible," he said. Injeti also mentioned that allowing or not allowing self-listing depends on the comfort and concerns of Sebi.

One such move is permitted, and NSE is able to meet requirements adequately to satisfaction of the regulator, then self-listing may become reality. According to him, things which were not permitted in the past are now allowed, and things that are not approved today may be permissible tomorrow, as he cited the example of listing of Market Infrastructure Regulators (MIRs). Listing of MIRs was not allowed prior to 2012 but was approved in 2013 of operationalised in 2015, he added.

"The difference is that if you have self-listing, you will also be regulating yourself in terms of LODR compliance and even the surveillance part. And, if it is a permission to trade, then that exchange, in this case (our own platform), will not have the regulatory obligation of monitoring the companies. The regulated exchange will be doing that," Injeti said. **AGENCIES**

Centre to borrow nearly ₹7.9 lakh cr in Oct-March

New Delhi: Govt will raise nearly Rs 7.9 lakh crore from securities in the second half of this fiscal year, reducing the borrowing for the current financial year by Rs 1,20,494 crore despite global headwinds.

The reduction in total borrowing and interest commitment to fiscal prudence. A senior finance ministry official said the reduction is mainly due to switching G-secs maturing in 2026-27 to G-secs maturing in 2025-26. The current management strategy of govt. "During 2026-27, govt is expected to have market borrowing of Rs 15,99,506 crore through dated securities, as compared to Rs 17,20,000 crore for the ongoing financial year," the finance ministry said in a statement.

Govt, in consultation with the Reserve Bank of India (RBI), has decided to borrow Rs 7,86,000 crore in the second half (H2) of FY 2026-27. This includes Sovereign Green Bonds (SGBs) issuance of Rs 15,000 crore, it said.

During the first half ending this month, govt would mobilise Rs 8,13,506 crore from bonds, slightly lower than the target of Rs 8,200 crore, to fund the revenue gap. Finance Minister Nirmala Sitharaman in the Budget presented on Feb 1 had proposed to borrow Rs 17.2 lakh crore to fund its fiscal deficit projected at 4.3% of the GDP. In absolute terms, the fiscal deficit is pegged at Rs 16.9 lakh crore for 2026-27. **AGENCIES**

TaMo focuses on sedan amid mounting cost pressures

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New Delhi: Tata Motors is absorbing a substantial share of rising input costs as price increases and savings fall to fully offset the pressure, even as it expands its compact sedan offering for family buyers. Commodity inflation over past five-to-six months had created uncertainty over costs and margins, said Shailesh Chandra, managing director, Tata Motors Passenger Vehicles. "So, there is a major part that is being not only absorbed but also coming from cost reduction side which we are accelerating."

Chandra put the additional commodity-cost impact at around 3%, with a variation of 0.5 percentage points. The company is combining price increases with faster cost reduction to cushion the impact. He also flagged emerging pressure on electronic components. "Semi-conductors and chips will come under pressure because of another mega trend on the AI side," he said, while cautioning that it was "not something to be alerted as a big issue at this stage".

Alongside these pressures, Tata is separating its compact sedan offerings for personal and fleet customers. The new Aeras will target families, while Express will serve taxi operators, moving away from Tigor's shared-brand approach. Compact sedans account for about 3.5 lakh units annually or 80-85% of India's sedan market. Chandra said volumes grew roughly 25-36% over the past year, with personal buyers contributing 35% of demand. Tata sees smaller cities and rural markets as important sources of demand, with sedans retaining aspirational appeal. Aeras will offer petrol and CNG options and seek to attract premium hatchback buyers. The company is withholding an electric version to avoid overlap with its existing EV portfolio. Meanwhile, demand for Tata's electric vehicles is running ahead of supplies. "The inability to supply is holding that penetration. So it's more supply side constraint," Chandra said.

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Small cars show signs of revival after GST boost

Volumes Grow After Two-Years Of Decline

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Chennai: Following a two-year decline in volumes, the small car segment is showing signs of revival, helped by GST rate cut on small cars. The lower tax burden has reduced the price barrier for buyers at the bottom end of the market, making entry-level cars more affordable.

Overall small car sales fell from 16.4 lakh units in FY23 to 14.5 lakh units in FY24, a decline of 11.4%, followed by a further 17% drop to 12.6 lakh units in FY25. In FY26, however, sales edged up to 13.2 lakh units, showing a 3.2% year-on-year recovery. In the first five months of the current fiscal, small car volumes grew 27% to 5.9 lakh units, according to Siam data.

"The potential of the small car segment remains strong. Sales of small cars grew 58% this year, resulting in share of first-time buyers rising from 44% to 54%, back to levels seen in FY19," said Partho Banerjee, senior executive officer, marketing for sales, Maruti Suzuki India.

He said for entry-level cars, where a buyer is upgrading from a two-wheeler to a four-wheeler, the priority is to offer a sunroof or other premium features, but simply owning a car. That makes the small-car market particularly sensitive to increases in costs.

Since GST 2.0 revision, starting prices of Maruti's small-car models have remained unchanged, despite significant commodity and input-cost pressures. "This has translated into a strong market response, with growth in volumes and share of first-time buyers," Banerjee added.

Following GST rate revision, sales of cars attracting 18% GST have been growing at around 30%, compared with about 22% for vehicles attracting 40% GST. "After GST 2.0, the growth is clearly stronger among people buying lower-priced vehicles, whose purchasing power is more limited," said an analyst at a brokerage firm. "Majority of players have reported positive growth in hatchbacks sales in this fiscal. There is a huge amount of interest among people who want to buy a four-wheeler. Affordability is what is holding them back," he said. "There is also a need for more launches in this segment to keep the excitement alive. There aren't enough models to cater to customers, as most of the launches have happened in the EV segment."

However, Banerjee said Maruti will continue to introduce refreshes, irrespective of whether the market is growing faster or slower, citing the recent unveiling of the Baleno with added features. He also pointed to the WagonR, which has been selling about 20,000 units a month despite the SUV boom.

Hyundai, too, has indicated that it plans to launch an upgraded i10 in the near future. India has a two-wheeler parc of around 27 crore, while car penetration remains at just 34 cars per 1,000 people. In developed markets such as Japan, higher levels of motorisation have been driven by a combination of rising aspirations and improving affordability, enabling more consumers to convert their aspirations into vehicle ownership, said Banerjee.

The premium is visible outside warehouses too. Timbucktoo, which connects college students with part-time jobs, said one retailer hiring through its platform can raise pay from around Rs 10 an hour on regular days to about Rs 150 during high-footfall sale periods, taking daily earnings in one example from Rs 600 to Rs 900.

Myntra, which is creating over 26,000 seasonal jobs for its Big Fashion Festival, said its reward system continues to include daily spot awards such as electronic gift vouchers or goodies for top-performing fulfillment-centre employees.

Fliqkart said its delivery workers are being offered joining and retention bonuses as well as referral incentives this festive season, alongside insurance and healthcare benefits.

Festive sales: Cos paying retention bonus to workers

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Bengaluru: The festive bonus is no longer always one big cheque at the end of a busy month. For workers packing orders, staffing stores or dealing with parades, the extra money can now come through a higher rate on a busy day, an attendance reward after a week, or even a milestone-based reward for staying through the entire sale season.

As commerce, retail and logistics companies ramp up for the year's biggest shopping period, competition for frontline workers is increasingly becoming a retention battle. Companies are putting greater emphasis on incentives tied to attendance, performance and completing the festive season, even as the actual boost to workers' take-home pay can depend heavily on targets and hours worked.

TeamLease Services said spending on festive incentives rose 15-20% in 2025 over 2024 and this year more of the incentive pool this year is being directed towards longer-duration retention payouts for weekly or monthly attendance and end-of-season completion bonuses. "Daily surge pay still exists, but it increasingly sits at the end of milestone-based rewards," said Balasubramanian A, senior vice-president at TeamLease Services.

The shift reflects cost of workers leaving midway through peak demand. Fewer attrition in high-pressure frontline roles was 35-40% last year, TeamLease said. Last season, monthly earnings across warehouse, fulfillment, picking and packing roles were 12-15% above normal months in metros and 18-22% higher in Tier-II markets, largely due to variable pay.

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India may sign new investment pact with Australia & Canada

TIMES NEWS NETWORK

New Delhi: The new model bilateral investment treaty (BIT), which will address concerns of several countries and streamline investment negotiation procedures, while ensuring investor protection, is in final stage and is likely to be approved by govt soon. The approval will pave the way for it to be rolled out along with trade agreements, with countries such as Australia and Canada, while also being used with partners such as the UK and the European Union.

One of the key elements is reduction in the period to seek international arbitration to one year from five years at present, providing domestic remedies accelerated.

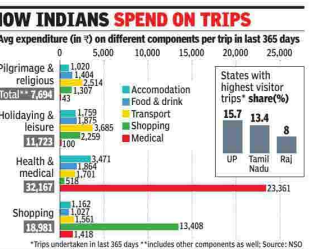
Ties with US in 'uneasy equilibrium': CEA

Mumbai on Thursday.

India's relationship with the US is in an "uneasy equilibrium" as trade disputes between the partners persist, a senior govt official said. "There is this issue of unsettled relationship with the US, starting from the tariff-related issues last year, which are still continuing," chief economic adviser V Anantha Nageswaran said in a speech at SBI's banking and economics conclave in Mumbai on Thursday.

New Delhi faces a fresh tariff threat even after reaching an interim trade deal with Washington earlier this year. A new US law gives president Donald Trump the power to impose levies of as much as 100% on countries that buy Russian oil and gas, adding uncertainty as India and the US negotiate a final tariff rate. Nageswaran said the trade and energy pressures faced by India may also reflect a broader push to choose between rival global blocs. "India, given its geography and its size, cannot obviously belong to any bloc," Nageswaran said, adding that maintaining its independence could come at cost of higher energy prices and periodic supply disruptions. **BLOOMBERG**

On Friday, commerce and industry minister Piyush Goyal said full FTA with Australia, which is under negotiation, will come with an investment pact. "Now we have decided to work towards a very balanced, fair and equitable, comprehensive economic cooperation agreement, which will also take our relationship to greater heights. We are working with Australia to have a bilateral investment treaty also. A BIT is an agreement between two countries to protect investments made by their investors in each other's territory. Under investment protection treaties, investors can take a sovereign govt to arbitration."



States with highest visitor trips share(%)
UP 15.7, Tamil Nadu 13.4, Rajasthan 8.0
*Trips undertaken in last 365 days **Includes other components as well. Source: NSO

frequency of domestic travel has increased in the past decade, compared to the last such survey in 2014-15. For every 100 tourist households, there are 127 trips now in rural areas, up from 118 in 2014-15. Urban areas recorded 132 trips compared with 121 earlier. While 22% Indian households went for a holiday or leisure trip, with May and Oct being the peak months, only 12.5% of rural tourist households undertook such trip as compared to 36.4% in urban areas in the past year.

Data also showed that more than 95% of the religious and leisure trips are self-financed, with no govt or any other institutional reimbursement option available to travellers, while 8% overnight trips undertaken for health and medical purposes were reimbursed by govt.

With regards to mode of transport used by the travellers, bus remains the primary mode of transport, accounting for 26%, while train (35%) remains the preferred mode for urban travellers. As a share of expenditure on trip components, people spent most on transport, both in rural and urban areas (nearly 35%), while going on religious or leisure trips. In case of medical trips, expenses on medicines were the biggest component (nearly 75%).

The survey also measured the share of households who undertook overnight trips in the past month. Societal trips (88%) accounted for the maximum share among these kinds of trips, with nearly 80% of the trips lasting less than three days.

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{ OUR TAKE }

US can no longer ignore China's rise

Trump's latest charm offensive is evidence that China matters to American interests across industry, West Asia, and the Russia-Ukraine war

So wrong! @BarackObama is hosting China's Xi Jinping today at the Pentagon with a full honor ceremony with music and cannons... That was Donald Trump, back in 2012. Irony has since come full circle — and so, it seems, has Trump. From trade to Taiwan to the wars roiling Russia and Iran, Trump and his Chinese counterpart have plenty to iron out before East and West can meet in spirit. But it hasn't escaped anyone's notice that the current occupant of the White House has turned out to be the most obliging American president in contemporary memory, as far as Beijing is concerned. The red carpet and all the accompanying pomp that Trump rolled out for Xi would have been unthinkable for either man just a few years ago. As the adage goes: in politics, there are no permanent friends or enemies.

If New Delhi is feeling a few jitters over the display of bonhomie in New York, that unease isn't entirely misplaced. Trump has spent years aligning his personal and political interests with Xi's. Consider Elon Musk — one of Trump's closest allies — who sat at the same table as both presidents and their spouses at Thursday's State banquet, and who made pilgrimages to China in 2023 and 2024. Or consider how Beijing has courted Ivanka Trump and Jared Kushner since 2017. Despite their fundamental disagreements on almost everything else, Washington and Beijing have been steadily working toward a mutually beneficial rapprochement.

Trump, evidently, is putting his dealmaker instincts to full use with China. He wants to negotiate hard: Whether the issue is America's dependence on Chinese rare-earth minerals or the competition posed by China's technological rise, Trump has made clear he doesn't want Beijing holding the upper hand. Xi, on the other hand, appears set to eliminate any impediments to China's economic growth and its geopolitical ambitions in the neighbourhood. The latest charm offensive is evidence (if any were needed) that China matters to American interests across industry, West Asia, and the Russia-Ukraine war. In some ways, this is the American diplomacy playbook at its most classic: embrace whoever can deliver. Before ties with Moscow soured, Trump's overtures to Putin were every bit as grandiose.

Yet it's equally clear that the US can no longer afford to ignore China's meteoric rise in the global political economy. Trump prizes strength. And as long as China remains a formidable global player, his administration will keep extending its goodwill gestures. Saudi Arabia offers a useful parallel from West Asia. It is no coincidence that the tightening American grip on Venezuelan oil and the cooling of the US-Saudi strategic partnership have unfolded almost in tandem. In India's case, Washington only took notice once its economy became too large to overlook — crossing the trillion-dollar mark in 2007. The signing of the civil nuclear cooperation pact the following year made that shift official. The recently passed Lindsey Graham Sanctioning Russia and Iran Act of 2026 applies to China and India equally. Postponing the tariffs on China until November suggests that the Xi-Trump summit may lead to some exclusive concessions. The lesson this summit offers New Delhi is very clear: In an increasingly inward-facing world order, strength remains the most potent negotiating tool.

In Xi-Trump summit pomp, pageantry has postponed pressure

Trump and Xi want the US and China to be partners, but the trust deficit and structural issues between them — Taiwan, technology, trade, critical minerals, AI, and Iran — will not go away

Chinese President Xi Jinping arrived in Washington DC on Thursday with a simple aim: Things are going as well as they can for China, so don't stir up things and let the world allow Donald Trump to do so. And so it has been: The outcome of the Xi-Trump summit is being assessed by the pageant and pomp displayed rather than measurable diplomatic outcomes. The trade truce between the two countries has been extended by two months, there is broad agreement on artificial intelligence (AI), and substantive talks on both issues have kicked down the road. Taiwan and Iran have not played the spoilers they could have been.

For all their sound and colour, summits do not often yield practical results. But the reception given to Xi upon his arrival in Washington DC, for his first State visit in a decade, was out of the ordinary.

For the first time since 1962, a US president met a visiting counterpart at the airport. On Thursday, there was a gun salute, medals waved flags, and the bands played the two countries' national anthems, and there were as many as two fly-pasts featuring cutting edge US war planes. And at all times, Xi was accompanied by an attentive, even deferential, Donald Trump and US First Lady Melania Trump. In his last visit in 2015, Xi had come as a supplicant, seeking to satisfy US demands on the climate crisis and cyber security. This time around, the atmospherics have been speaking for themselves.

At the talks on Thursday, Xi said Trump and he had "maintained communications" and both leaders had worked together to "steer the giant ship of China-US relations." This was based on their May agreement in Beijing to pursue a

"constructive relationship of strategic stability" whose pillars were cooperation, limits on competition, and effective management of differences. This was necessary, he said, to avoid the Thucydides trap that could push the two countries into a military collision.

Earlier, welcoming Xi to the country, Trump spoke of the "true great friendship" that had helped to shape their relationship.

Under the agreement arrived at in Busan, South Korea, in October 2025, the US lowered its average tariff on Chinese imports to 47% and fentanyl-related levies to 10% and suspended high tech export controls. The Chinese, in return, eased their draconian restrictions on rare earth mineral supply. Beijing also resumed the large-scale purchase of US agricultural goods such as soybeans.

Now, amid this atmosphere of bonhomie between Beijing and Washington, the Graham Act, recently enacted by the US Congress, which bans draconian tariffs on China and India on account of their Russian oil purchases seem to have been set aside for the moment.

By extending the truce till January 2027, the two sides seem determined to fashion a more durable trade deal. The primary interest of both sides is to keep the relationship steady. Trump wants this at least till the November mid-term elections in the US; Xi would like it for a longer period to get the country's sputtering economy going and to overcome his purge of the top ranks of the Chinese military.

The most talked about item on the presidents' agenda has been AI. During the talks, Xi spoke of continuing their dialogue and declared "AI must be kept under human control." Earlier, Trump had tweeted, "Super Intelligence (SI) will be a big topic of discussion, but I want to leave it exactly where it is. That is China's position also."

There was little or no reference to Iran in the public remarks. Trump is likely to have asked Xi to talk to the Iranians, but Beijing is clear that it would not like to get involved beyond a point. It is well known that China doesn't want the regional tensions to spill over into Yemen and the Red Sea.

The elephant in the room during the talks at the White House was Taiwan. Xi indicated in his remarks that China's position was "clear-



No matter how intractable some of China and the US's problems are, we should not discount the value of the face-to-face meetings between the two presidents.

cut" and hoped that the US would "adhere to the correct position of opposing Taiwan independence." He is alluding to the profound diplomatic and operational nuance in the US position that it "does not support" Taiwan's claim for independence. What the US posture was on Thursday is not yet known.

For India, the ledger tilts toward loss. The pageantry undercuts the premise that India is the US's indispensable counterweight to China in Asia, and a president who calls arms supply to Taiwan "a good negotiating chip" with China may see Quad the same way.

The Graham Act's tariff threat shows the asymmetry: India can be punished for what Beijing is very well spared. The sensible response for New Delhi is to stop waiting for Washington's favour and to build leverage of its

THE PAGEANTRY UNDERCUTS THE PREMISE THAT INDIA IS THE US'S INDISPENSABLE COUNTERWEIGHT TO CHINA IN ASIA, AND A PRESIDENT WHO CALLS ARMS SUPPLY TO TAIWAN "A GOOD NEGOTIATING CHIP" WITH CHINA MAY SEE QUAD THE SAME WAY

own, through trade deals with others, domestic capacity in critical minerals and electronics, and a border settlement with China that is negotiated on India's terms rather than after a US-China deal has already set the terms.

In his dealings with China, Trump has been uncommonly accommodating. The grand Washington reception and State dinner will play well not just with the domestic audience, but also with the Global South, where China has considerable influence. Thursday's summit was the third face-to-face meeting between the two leaders in less than a year, and we are likely to see yet another in November at the Asia Pacific Economic Cooperation (APEC) summit in Shenzhen, China. This will be followed by one at the G-20 summit scheduled in December.

No matter how intractable some of China and the US's problems are, we should not discount the value of the face-to-face meetings between the two presidents. As Chinese foreign minister Wang Yi noted, "Head of State diplomacy is the cornerstone of China-US relations."

But while Xi wants the US and China to be "partners, not rivals," and Trump says "we've never gotten along better," the trust deficit and structural issues between them — Taiwan, technology, trade, critical minerals, AI, and Iran — will not go away. The Washington summit has managed the rivalry, it has not resolved it.

Manoj Joshi is a Distinguished Fellow, Observer Research Foundation, New Delhi. The views expressed are personal

The case of the missing distinguished jurists

Justice Ujjal Bhuyan, a sitting judge of the Supreme Court, recently remarked that it was regrettable that no "distinguished jurist" has ever been appointed as a Supreme Court judge. Article 124 (3) of the Indian Constitution outlines three categories eligible for appointment to the Supreme Court: A high court (HC) judge with five years of experience, an advocate in an HC with ten years of experience, and a distinguished jurist. While the first two categories are self-explanatory, "distinguished jurist" is not defined in the Constitution. There is, though, a consensus that it refers to those who teach law. Debates during the Constituent Assembly, involving eminent members like HV Kamat, B.R. Ambedkar, influenced by the appointment of Harvard law professor Felix Frankfurter to the US Supreme Court, amply demonstrate the rationale for expanding the pool of candidates for Indian Supreme Court judges. The Constituent Assembly believed that appointing law professors would enhance diversity and intellectual depth on the apex court's bench.

As Justice Bhuyan aptly observed, despite the constitutional mandate, no law professor has ever been appointed a judge of the Supreme Court, reigniting the debate over appointing distinguished members of this cohort to India's apex court. This is despite India producing some outstanding law academics, such as PK Tipiradey, Upendra Banerjee, Gopal Ganesh Lalit, and B S Chinnai (among many others). The

works of these renowned scholars have been cited globally. Their scholarship has played a critical role in expanding the frontiers of legal knowledge. As judges at the country's apex court, they would have surely brought a certain degree of rigour and excellence to Indian jurisprudence.

While most debates on this issue have focused on Article 124(3) and other related issues, what Justice Bhuyan has pointed out is merely a symptom of a much deeper malaise. The malady is that, in India, law academics have rarely been accorded the respect they deserve. Consider some of the structural issues. India has more than two dozen National Law Universities (NLUs), each governed by legislation enacted by the state legislature in whose territorial jurisdiction the NLU is based. Almost all of these pieces of legislation provide that either the Chief Justice of India or the chief justice of the High Court of the state shall be the chancellor of the university, with law professors appointed as vice-chancellors. This is remarkably different from many central universities that have professors as their chancellors, appointed by the President of India, who acts as the Visitor of these universities. This is also different from state universities, that is, universities created by the state legislatures, which routinely have governors as their chancellors. The significance of this is that a system obsessed with hierarchy and protocol,

our state legislatures want our lordships at the top, and the law professors report to them as vice-chancellors. It is then not too surprising that the same lordships as members of a collegium would be averse to appointing a law professor as their equal on the apex court's benches.

The problem, however, is not just with the judiciary; it runs deeper. The executive, too, has treated law professors with lesser consideration than the latter perhaps deserve, believing that their expertise is simply restricted to classroom teaching. Never has a law professor been appointed as the chairperson of the Law Commission of India — a critical body tasked with recommending improvements in the Indian legal system. It has mostly been helmed by retired judges. Rarely does the executive involve law professors in an institutionalised manner to seek their expertise in developing robust laws, including niche areas such as law and technology, international trade, foreign investment, capital markets, arbitration and competition law. Consultation with non-governmental experts means consulting law firms or, at best, a few Delhi-based think tanks, that often end up saying what kings in power want to hear.

The lukewarm approach towards law professors is not confined to the domestic arena but extends to the international level as well. Take India's nominations to the International Court of Justice (ICJ), for instance. Four Indians have served on the ICJ — a body that settles international disputes under international law. Two were members of the Indian Civil Services during British rule. The other two are retired Supreme Court judges who seldom dealt with international law during their judicial careers. Nominations of Indian candidates to the International Law Commission —



Prabhakar Ranjan



Despite the constitutional mandate, no law professor has ever been appointed a judge of the Supreme Court.

the UN body that codifies customary international law — have been no different. Most appointments have been those of government lawyers working as full-time employees of the ministry of external affairs.

There appears to be a mutual understanding between the judiciary and the executive, forming an unwritten agreement that all key positions, both nationally and internationally, are reserved for them. This gatekeeping, which differs from the practices of many other liberal democracies, effectively prevents law professors from entering these roles despite their expertise. While one should thank Justice Bhuyan for drawing attention to this issue again, given the deep-rooted institutional and structural inertia, change is unlikely.

Prabhakar Ranjan is a professor and vice-dean (research), Jindal Global Law School. The views are personal

In India's fight against TB, Bihar remains a champion

Few public health transformations in India's history match the shift underway against tuberculosis. Under the TB Mukti Bharat Abhiyan, India no longer waits for patients to arrive with symptoms. It goes looking for them. Bihar took that mandate seriously. Against a target of screening 10 million people for TB by August 14, it was informed, that we have screened nearly double that number.

Nearly half of all TB cases present without symptoms, silently spreading transmission, and Bihar's incidence remains well above the national average. Closing that gap meant expanding the tools to find people before they knew they were sick.

This is not the first time Bihar has led rather than followed. Patna was one of

three cities chosen to pilot a model for engaging private health care providers to deliver quality TB care. The evidence gathered here went on to inform the scale-up of that model across 200 districts nationally. That early engagement with the private sector has shown incredible results in the state.

When Prime Minister Narendra Modi addressed the Delhi End TB Summit in 2018 and made TB a personal political commitment, it signalled something that India was no longer a country defined by its TB burden, but one confidently charting its path out of it.

The private sector has been drawn into this effort with equal purpose. Doctors and facilities outside the public system are now

required to report every TB case they diagnose, and private practitioners account for over 35% of case notifications today.

The results speak for themselves. According to the World Health Organization, India recorded a 21% reduction in TB incidence since 2015, nearly double the global rate of decline, alongside a 25% fall in mortality due to TB.

Since 2018, direct cash transfers have been mandated for every notified TB patient, to meet their nutritional needs during treatment. And in keeping with the Jan Bhagidari spirit, over 700,000 village-level Miras, citizens, corporations and community organisations, have stepped forward to offer psychosocial and nutritional support of their own.

Closing Bihar's remaining gap will take more than government machinery alone. Elected representatives, community leaders and popular figures across the state are carrying forward the same Jan Bhagidari spirit that has powered

the movement so far.

Eliminating TB requires a social response that matches it in clinical scale. Together, we must build an environment of empathy and support rather than discrimination. Every ministry whose mandate touches the conditions that make people vulnerable to TB is being drawn into this effort.

Young people are carrying peer-led awareness further than any government campaign could reach on its own. In media has an equally vital part to play. Sustained, informed coverage can ease stigma and encourage people to seek care.

Science is moving in our favour. A new generation of diagnostic tools, portable, non-invasive, closer to the patient, is within reach. While the country continues to adopt newer technologies, what closes the distance to elimination is not technology alone. It is resolve. And that resolve, I see in Bihar, and across the country.

Lieutenant General Syed Ata Hasnain (ret.) is the governor of Bihar. The views expressed are personal



Syed Ata Hasnain

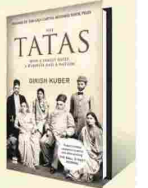
{ EDITOR'S PICK }

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

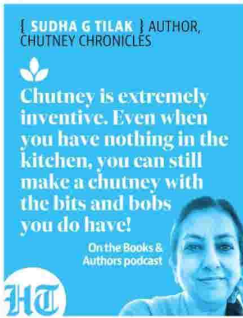
OF FAMILIES AND BUSINESSES THEY BUILD

The controversy over the reappointment of N Chandrababu Naidu, chairman of Tata Sons and Tata Group, has drawn national attention to the conglomerate's governance structure and the family that created this Indian business behemoth.

Against this backdrop, read former journalist Girish Kumar's *The Tatas: How a Family Built a Business and a Nation* (translated into English from Marathi by Vikram Pandey in 2019). Packed with anecdotes, the book arranges much of what was known about the Tatas in the public domain and some of what wasn't in a neat chronology. Kumar starts with Nusserwanji Tata's move from Navsari, Gujarat, to Bombay, after giving up his family profession of priesthood. Then appears his son, Jamsetji, who sowed the seeds of the conglomerate as we know it today. And finally, it's Ratan Nalav Tata juggling twin forays into IT and passenger cars. The book perhaps looks too fondly at the Tatas, but the information it packs more than compensates for the slant.



The Tatas: How a Family Built a Business and a Nation by Girish Kumar 2019



[SUDHA G TILAK] AUTHOR,
CHUTNEY CHRONICLES

Chutney is extremely inventive. Even when you have nothing in the kitchen, you can still make a chutney with the bits and bobs you do have!

On the Books & Authors podcast

[MARCUS DU SAUTOY] AUTHOR, BLUEPRINTS

“Shakespeare was a number nerd”

On celebrating the connections and the overlap between the realms of mathematics, creative art and nature

Simar Bhans

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1 You assert that artists and writers tap into the same structures that you recognise as a mathematician.

The book is the stories of the many artists that I've either collaborated with or whose work I've enjoyed. It surprised me so often that when they say this is really how this thing works and I'll say, but that's a bit of mathematics and they'll go, really? You think that these two worlds are almost like chalk and cheese, so opposite. Yet, often I'll talk to a composer and they'll explain how their piece is put together. And I'll say, but that's using ideas of symmetry or Fibonacci numbers or golden ratio. Sometimes, even the artists are surprised because they do it for the aesthetic value of the thing. And then they're surprised when they discover that I recognise that as a piece of mathematics. The book is telling lots of stories of the way these two worlds meet.

2 Please tell us more about how Shakespeare would disrupt his iambic pentameter for effect.

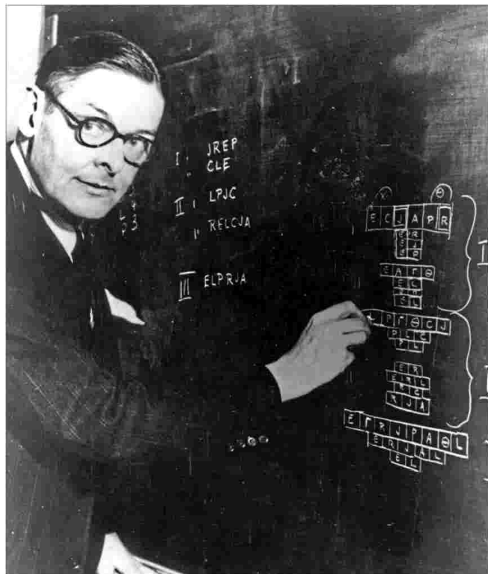
So, the most famous line of Shakespeare, “To be, or not to be, that is the question” is 11 syllables. I think Shakespeare is doing this very deliberately, that iambic pentameter has a kind of almost sonic feel to it. Then, he wants to make sure that you notice this speech is the most important speech of the play. Hamlet is considering suicide and is worried about what might happen after he kills himself. So that's a disruption to make you actually sit up and take note of what's going on. And there's a wonderful allegorical poem that Shakespeare wrote, *The Phoenix and the Turtle*. A lot of people have had trouble understanding the significance of it. But, if you read it, you see that, again, there's a lot of prime numbers and actually even references to mathematics and Euclid. So that poem is very intriguing for almost being a celebration for Shakespeare of the power of number in poetry.

3 During your research, what was that one discovery that elicited the most emotion out of you as a mathematician?

I think it probably was the Shakespeare. I performed Shakespeare plays as a student but I never realised that this idea of number was so important to him. I learned it because I talked to the English tutor in my college in Oxford. He's a Shakespeare expert, Will Poole. I asked him because I'd been asked to do a talk about Shakespeare and mathematics and I knew nothing about it. For me, that was the really surprising discovery – to find somebody as literary as Shakespeare, the greatest wordsmith of all time was also a number nerd.

4 What do you want non-mathematicians to take away from your book?

I want it to resonate with people who are nervous about mathematics but then see that, oh, but the music, the visual art or the architecture I enjoy – mathematical ideas are being used to create those. I want people to realise that mathematics isn't in a separate silo.



TS Eliot's 138th birth anniversary

The British-American poet, playwright and critic, one of the immortals of modern literature, was the author of such enduring works as *The Love Song of J Alfred Prufrock* (1915), *The Waste Land* (1922), and *Murder in the Cathedral* (1935). At left, Eliot (1888-1965) at the blackboard at the Institute for Advanced Study at Princeton, New Jersey, USA, on 15th November 1948

GETTY IMAGES

Fearful symmetry

Anant Sonawane's *Maya: The Biography of a Tiger*, which traces the journey of the Tadoba-Andhari Reserve's most famous female tiger, inspires a deep appreciation for these magnificent cats

Lamat R Hasan

letters@hindustantimes.com

Originally written in Marathi as *Ek Hoti Maya*, journalist-turned-conservation communicator Anant Sonawane's *Maya: The Biography of a Tiger* traces the 11-year journey of the most famous tigers of Maharashtra's Tadoba-Andhari Tiger Reserve with gentle care, even as it resists the urge to dole her out turn her into a man-eating monster.

Born in 2010, Maya was orphaned early. Yet, even before her mother Leela's untimely death, the forest staff and tourists had taken a liking to this little, spunky cub. She would, out of curiosity, check out safari jeeps up close, giving tourists plenty of opportunity to photograph her. Her unusually friendly and relaxed encounters made her the darling of the reserve, and soon enough tourists came looking for Maya. From her mother, she inherited the prime territory, rich in water and prey, that is part of the Tadoba tourism zone. This made her easily visible to tourists, but this was also territory that was difficult to defend. Multiple tigers frequently encroached her range and guarding it from them was a task. Sonawane writes that these challenges turned Maya into a skilled hunter, sharp strategist, and fierce defender. She often mated with more than one tiger to confuse them, and save her cubs that they were not yet fished.

Sonawane writes in his introductory note, “It was this constant tension – the balance between strength and vulnerability – that drew me deeper into her story.” The more I explored her story, it felt less like the life of a tigress and more like that of a cinematic heroine. There was everything – emotion, drama, striking visuals and unforgettable moments. To capture

that richness through photographs alone felt inadequate. Maya's journey deserved a narrative of its own.

Therefore, this biography is not merely anecdotal, but based on solid facts. It is full of breathtaking photographs with sketches maps thrown in to ease comprehension. Forest department records are referred to and wildlife experts consulted to understand the behaviour and tough life of a tigress in the wild.

Born to Leela and Hilltop Male, Maya got her name from the M mark on her shoulder. Officially she was T12. During her lifetime, she mated with Gabbar, Namdev, Matkasur, Tala and Balram. She had 12 cubs in all, of which only two made it to adulthood. The first time Maya was noticed on her own, she stunned tourists with her cuteness. Unfazed at their presence, or the constant clicking of their cameras, she posed fearlessly, stopped to sniff a parked motorcycle and then walked away with the guard's lunchbox that was hanging from the bike's handlebar.

After her mother's passing, she seemed lost and distraught. So much so that when she found a langur a few feet away from her, she did not pounce. It was only when the langur came up and smacked her face that she charged at him. Gradually, she claimed her territory, marking it with her scent, and regularly patrolling it. She often hunted in front of tourists or proudly carried her kill as she walked past them. She surprised them once by caressing a spotted deer fawn. The onlookers thought that she was preparing for the kill but she let go of the fawn after a playful interaction that lasted a few minutes.

Gabbar, who had an imposing personality, was the first tiger in Maya's life. Sonawane drops biological facts regarding tigers to make the readers understand the mauling process, which lasts around a week. When Maya was fully pregnant, she disappeared from public view, emerging a month later with her tiny cubs. Her next partner was Matkasur, whom she threw away from her territory once after a violent encounter. However, he returned and this time, she accepted him. The very next day, Matkasur hunted a sambar and presented it to Maya as a gift. From then on, the two were often seen together, writes Sonawane.

The author extracts the many layers of

the personality of Maya, who, while becoming the face of the tiger reserve and driving tourism, was blamed for taking four human lives. Two months after she was seen caressing a fawn, she killed her first human who had trespassed onto her territory. As the spotlight was always on her, Maya's detractors believed her contribution to the reserve was minimal and that she was a careless mother. Only two of her male cubs survived. The author defends Maya, saying that she had to face challenges that other tigers did not. Over the years, she had to defend her territory against the simultaneous incursions of five male tigers.

The author defends Maya's killing of four humans too. He emphasises that all those killed were in a crushing position and could have been mistaken for prey. Sonawane states that Maya was a wild tigress, not a domesticated cat, and resided in her natural habitat where all her instincts were driven by the laws of nature. He also throws in scientific facts about humans not being natural prey for tigers and cites several instances where Maya holds her “dubbar”, thoroughly enjoying the attention showered on her by tourists, never once attacking anyone. In fact, her most famous photograph was of embracing her cub in full public view in January 2016. This photo amassed millions of online views and eventually a Rs 25 postage stamp bearing the image was released to mark World Tiger Day.

He concludes that Maya may not have been able to increase the tiger population, but her “contribution to Tadoba's visibility – and by extension, to conservation – is undeniable.” The revenue generated from increased tourism provided funds that the forest department could use for conservation efforts. Moreover, it created employment for thousands of locals, fostering greater community involvement in conservation, he asserts.

The book is well-written and very moving but the details are often sketchy and the reader is left yearning for more stories about Maya's life and adventures. Still, Anant Sonawane has succeeded in inspiring empathy, respect and a deeper appreciation for the life of wild tigers, which is the goal of this book.

Lamat R Hasan is an independent journalist.

{ HT PICKS } NEW READS

OF YAKSHINIS, YOGINIS AND MORE

Drawing from myths, folktales, and retellings from the epics, *Stree Sutra* edited by Koral Dasgupta features 22 diverse voices breathing life into the stories of lesser-known celestial women – apsaras, yakshinis, gandharvis, nagas, yoginis and more.

The contributors to this anthology include Anand Neelakantan, who writes about north Malabar's Muchilottu Bhagawati and K Hari Kumar, who gives voice to Hildimi, mother of Ghatotkachi in *The Mahabharata*. Shilpi Antony writes about Bhadrakali. Kiran Manral looks at Dakini, one of the incarnations of Shakti. Sunita Pant Bansal draws on the traditions of her native Almora in a piece on Garh Devi, and Deep Halder writes about Bon Bibi.

There are others too. Together, these works depict the forms of the Devi as powerful guardians of people, forests, mountains and rivers, whose presence is part of the spirit of the subcontinent.

Stree Sutra: Demi Goddesses of Indian Myth and Folklore
Edited by Koral Dasgupta
480pp, Rs 599
Pan

FREE FLOATING THROUGH PARIS

Chateaux Rouge: Amit Chaudhuri's latest work is a meditative and fragmentary novel about a writer invited to a residency in Paris. There, he subverts an apartment in the Chateau Rouge area, which bears little resemblance to his idea of the city.

The experience eventually leads him to a new expansive attitude toward the place with his disquiet translating into a way of seeking and experiencing a truer, more unlikely Paris.

Chateau Rouge floats freely through Paris, exploring tangents, diversions, side streets and alleyways, and creeps into new spaces and remote angles, to open up fresh ground and appraise the city, the experience of travel, and otherness, and the idea of the novel itself.

Chateau Rouge
Amit Chaudhuri
176pp, Rs 599
Westland

PARTITION IN DELHI: WHEN THE HUNGAMA BEGAN

1947. The hungama began. I wrote and wrote. My husband thought hungama adab was journalism, not literature. He was trying to protect me. But if I had not written it, the veins of my brain would have burst. All my wealth, my precious books, had been destroyed in communal fires of Maktaba Jamia and Kitabi Duniya. The trickling blood of that wound found its way into these six afans. In 1948, the book, *Nisra Mein Aaz*, was published in Bombay. I dedicated it to Mahatma Gandhi. These are the words of Salila Abid Husain in 7 from 1947, which describes the scene in the September of that fateful year in Delhi. She records the events in stories that are chillingly of-the-moment. This is among the first testimonies to the simultaneous Independence and Partition of India.

7 from 1947: first-hand stories
Salila Abid Husain, translated by Syeda S Hameed
150pp, Rs 450
Women Unlimited

ontheweb

READ: Lea Ypi's *Indignity*, which takes in the sweep of Albanian history, moves across countries and generations to show how large political transformations reshape the most intimate aspects of everyday life. At the same time, it asks if the truth about the past can ever be fully recovered.



{ GRAPHIC NOVEL } MEMOIR

Gulab jamuns and machine guns

Chintan Girish Modi

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Alaka Rajan Skinner's *Persian Nights*, an Indian child in Iran, a graphic novel, is about the author's experience of living in that country during the 1970s, when her father got a teaching job at Tehran University. “This incredible country with its rich culture and heritage was home to us for 10 years and an extremely important part of my growing up years,” Rajan Skinner writes in her author's note.

As a child, she noticed that many of the herbs and spices like saffron, dill, turmeric, cinnamon, coriander, cumin, ginger and cardamom used in her mother's Indian cooking were to the country in 1974. During

that visit, undertaken during a severe global oil crisis, the Shah of Iran, Mohammad Reza Shah Pahlavi, agreed to contribute to India's energy security in exchange for the supply of skilled professionals. The family's apartment in Tehran was small but had a gorgeous view of snow-capped mountains in the distance. The author contrasts this picturesque setting with the sibling squabbles that took place indoors. At school, the curriculum included Farsi, English, Hindi and Punjabi, and the canteen served chana bhatura and

samosas. The reader also learns about the neighbours: an Iranian man married to an Indian woman. Their love of music is evident from an illustration of the couple dancing away to Boney M's *Daddy Cool*. At this point, a wave of Westernisation was sweeping through the country and American hits were played on the radio, in clubs, and at house parties. Things changed rapidly with the Islamic Revolution (1978-1979). Religious leaders opposed the

rapid modernisation, especially with respect to women's rights and eventually, the Shah fled Iran and Ayatollah Khomeini declared the nation an Islamic republic. Rajan Skinner's narrative documents the same history through personal anecdotes, often laced with humour. Before the Islamic Revolution, Iranians used to talk about the striking resemblance between her father and the Shah of Iran. The joke died a natural death afterwards. In another incident, that probably elicited nervous laughter at the time but is hilarious in the book, the family car with the author's father at the wheel is stopped by a group of armed Islamic guards. One of them, sporting a large beard

and carrying a machine gun, tapped on the window. When it was rolled down, the guard said, “Salaam Ustaad! Do you remember me? I was your student at the University six years ago. You gave me a failing grade in English.” The visual and psychological landscape of the era is vividly presented through illustrations of protesters chanted “Death to America. Death to the Shah” and revolutionaries stopping by the author's home to warn the family of anticipated gunfire. Amidst this gloom, an unexpected light exchange occurs when chador-clad, weapon-wielding women ask the author's father how many wives he has. That he has only one surprises them and he is told that he is still young and must get another one. He agrees to consider the suggestion.

The book, which pairs nostalgia with realism, never descends into sentimentalism. The Iran-Iraq war eventually



Athletes at Heydarnia Stadium in Tehran, Iran, 1970s. GETTY IMAGES

compelled the family to return to India. The Persian carpet they had to leave behind becomes a painful symbol of separation. The Iran-Iraq war eventually

divine depiction of the humanitarian impact of conflict.

Chintan Girish Modi is a journalist, educator and literary critic.

The Statesman

Incorporating and directly descended from
the Friends of India - founded 1818

Trust Test

India's financial markets are approaching a significant institutional milestone. The public listing of the National Stock Exchange (NSE) offers investors an opportunity to participate in the expansion of the country's capital markets. But the more consequential question is whether the institution that facilitates this expansion can demonstrate that its commercial ambitions are matched by its commitment to transparency, accountability and investor protection. The NSE occupies a central position in India's financial system. Its success reflects the growing participation of households in equity markets, the expansion of mutual funds and the technology in trading. A successful listing could deepen public engagement with financial markets and provide a fresh impetus to India's IPO activity. Yet the enthusiasm surrounding a major share sale should not obscure the institutional responsibilities that accompany such prominence. The proposed offering also presents an unusual distinction. Existing shareholders are selling their stakes, rather than the exchange issuing new shares to raise capital for itself. The transaction will therefore provide liquidity to investors without directly bringing fresh funds into the institution. Its significance lies primarily in establishing a public market valuation and opening ownership to a wider pool of investors.

That distinction matters because a stock exchange is not an ordinary commercial enterprise. It operates critical market infrastructure, on which investors, brokers and companies depend. Its profitability is important, but so is the integrity of the systems through which financial transactions are conducted. The exchange must inspire confidence not merely as a business, but as an institution responsible for ensuring fair and orderly trading. The NSE's prolonged journey towards listing makes this issue relevant. Allegations of preferential access to its trading systems and failures of governance delayed its plans for years. A public listing cannot, by itself, erase that history. Instead, it raises the expectation that disclosure, independent oversight and accountability will become more consequential as the institution comes under closer public scrutiny. There is another tension in the exchange's growth model. The NSE's position in derivatives trading has helped make it a major force in global financial markets. But the scale of such activity also raises questions about the sustainability of revenue generated by speculative participation. Regulatory restrictions intended to address individual investors' losses could affect trading volumes and earnings. This is not simply a commercial risk; it reflects the challenge of balancing market expansion with safeguards against excessive speculation.

The timing adds another complication. Weakness in equities, foreign-investor withdrawals, currency pressures and expensive oil could temper enthusiasm for new offerings. Large IPOs may also draw funds away from existing shares, creating competing demands for investor capital. The NSE listing should therefore be judged against a broader standard than its size or subscription figures. India needs capital markets that mobilise household savings productively, allocate capital efficiently and protect confidence in the fairness of trading. A public listing must widen ownership. Whether it strengthens trust will depend on the governance and market discipline that accompany it.

Cost of Care

India's expanding hospital infrastructure presents a paradox that policymakers can no longer afford to ignore. More hospitals, better diagnostics, treatment and greater private investment have increased the availability of medical care. Yet for millions of families, access to treatment remains constrained by its cost. A healthcare system that expands capacity without ensuring affordability risks making medical progress an exclusive privilege. The consequences extend well beyond individual bills.

When a serious illness forces families to exhaust their savings, sell assets or borrow heavily, healthcare becomes a source of economic insecurity. A cancer diagnosis or cardiac emergency can undo years of financial stability. The burden is particularly severe for households without comprehensive insurance, for whom even routine procedures can involve difficult financial choices. India's private healthcare sector has a legitimate case to make. Hospitals require substantial investment in buildings, equipment, skilled personnel and patient safety. Private capital, including foreign investment, will remain important in meeting the country's growing demand for medical services. Regulatory intervention that ignores these costs could discourage investment, restrict capacity expansion and ultimately reduce access.

But the argument for investment cannot become a justification for opaque billing, unnecessary investigations or prices that bear little relationship to the actual cost of treatment. Healthcare is not an ordinary consumer market. Patients facing emergencies cannot readily compare providers, negotiate charges or postpone purchases. The imbalance between hospitals and patients makes transparency and accountability indispensable. This is where the government's responsibility becomes critical. Price regulation deserves serious consideration, but blanket caps imposed without reliable cost assessments could create unintended consequences. Operating costs vary across regions, institutions and levels of care. Any regulatory framework must distinguish between legitimate differences in costs and excessive charges, while ensuring that hospitals cannot compromise treatment standards to protect margins. The immediate priority should be transparent, standardised billing, enforceable treatment protocols and effective oversight of medical devices, diagnostics and hospital charges. Patients must know what they are paying for, while regulators need the authority and information to identify abusive practices.

Insurance coverage must also become more meaningful, rather than leaving families exposed to substantial expenses despite having nominal protection. Ultimately, however, regulating private hospitals cannot substitute for strengthening public healthcare. India's public hospitals remain essential to providing affordable care, particularly for those who cannot afford private facilities. Greater government investment in district hospitals, medical colleges, primary care and essential diagnostics would expand genuine choice and reduce dependence on expensive providers. The challenge is not to choose between private investment and public provision.

It is to establish a system in which they serve complementary purposes, with public institutions guaranteeing access and private providers operating within clear standards of accountability. India's healthcare system cannot be measured simply by hospital beds added, capital attracted or corporate valuations achieved. Their true measure is whether an ordinary family can obtain necessary treatment without facing financial devastation. A hospital expansion that leaves patients unable to afford its services is an incomplete achievement. Healthcare must remain a public responsibility even if treatment is private.

No planet without One Health

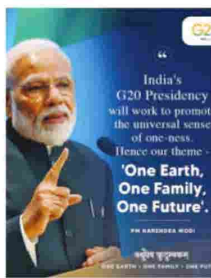
A mission created by an advisory council and sustained by a Cabinet note is an arrangement. It coordinates when coordination is convenient and stalls when it is not. It cannot compel a ministry that does not report to it to release a dataset it considers its own. It cannot survive a change of personnel, a shift in priorities, or the slow decay that follows every outbreak. Without statutory backing, One Health in India will remain what it currently is - a committee with excellent intentions and no administrative teeth.

One Earth, One Family, One Future. India said three of the words at the G20. The fourth is the one that holds the other three up. On zoonoses, surveillance and the institution India has designed but not yet built India offered the world a sentence at the G20: Vasudhaiva Kutumbakam - One Earth, One Family, One Future. It was the right sentence, and it was incomplete. One Earth is a geography. One Family is an ethic. One Future is an aspiration. Not one of the three survives contact with a single virus crossing from a pangolin to a farmhand in a district nobody has heard of.

The word that makes the others load-bearing is One Health. There can be no One Planet without it. This is not a rhetorical flourish. Roughly six in ten known human infectious diseases and around three-quarters of emerging ones originate in animals. India holds the world's largest livestock population, extraordinary biodiversity, dense human settlement and rapid land-use change - the four ingredients of spillover, concentrated in one subcontinent. If the next pandemic has a postcode, statistically it is likely to be ours than most.

Here is the uncomfortable test. Ask a district health officer in a tier-two town what the National One Health Mission is. Ask a municipal commissioner, a block veterinary officer, a pollution control board engineer. Outside the small circle of people who sit on its committees or get invited to its symposiums, the answer is usually silence. India's most important public health idea of this decade is currently a conversation among the converted.

That is not far from effort. The record is genuinely creditable. The Mission was recommended by the Prime Minister's Science, Technology and Innovation Advisory Council in 2022 and received Cabinet approval in February 2024. It is steered by the Office of the Principal Scientific Adviser, implemented through ICMR, anchored in a new National



Institute of One Health at Nagpur, and now spans more than a dozen central ministries. A BSL-3/4 laboratory network has grown to twenty-two facilities. The Department of Animal Husbandry and Dairying runs a One Health Support Unit. NCDC runs a national zoonoses programme; pilots in Karnataka and Uttarakhand have tested integration on the ground, and full-dress pandemic mock drills have been staged in Aimer and Khawda. States were formally convened for the first time in 2025. This is a country that has done the thinking.

What India has is a mission. What India needs is an institution. The gap is not ambition or science. It is legal form. A mission created by an advisory council and sustained by a Cabinet note is an arrangement. It coordinates when coordination is convenient and stalls when it is not. It cannot compel a ministry that does not report to it to release a dataset it considers its own. It cannot survive a change of personnel, a shift in priorities, or the slow decay that follows every outbreak.

Without statutory backing, One Health in India will remain what it currently is - a committee with excellent intentions and no administrative teeth. That statute would give it a unambiguous and decisive legal mandate, a permanent line in the budget rather than a project cycle, defined powers to require data sharing across sectors, and a named authority answerable for acting on a signal. Add to it a doctrine that protects the officer who acted early and turned out to be wrong - because if every false alarm is an administrative black mark, officials will rationally wait for certainty, and waiting for certainty is exactly what costs us eighteen months and several hundred thousand lives.

Count honestly and the departments that touch this problem number closer to twenty-five: health, animal husbandry, fisheries, agriculture, environment, forests and wildlife, urban affairs, jail, shakti, drinking water and sanitation, food safety, tribal affairs, disaster management, science and technology, biotechnology, space, statistics, home, consumer affairs, labour, Ayush, and the state machinery beneath each. They will never be integrated by meetings. They can only be integrated by a common grammar.



That grammar is federated interoperability. Note the word: federated, not centralised. We should not attempt to pour every dataset into a single national vault - politically impossible, technically fragile, and unnecessary. What we need is that a poultry mortality record, a hospital fever report, an antimicrobial resistance reading from a river and a wastewater sample all carry the same locational and temporal stamp, in the same format, at the same administrative unit.

That unit should be the district. Data stays where it lives: the question travels. Interoperability is a governance decision that merely looks technical.

We do not fail to see. We fail to integrate.

India is, in fact, good at surveillance. IDSP reports, veterinary networks, pollution monitoring, food sampling, INSACOG's genomic consortium - which was stood up across dozens of laboratories in months and genuinely worked. The failure is not observation. It is coordination. An unusual cluster of poultry deaths means little. A shift in resistance genes in a river means little. A handful of atypical fevers at a district hospital means little. Read together, in the same week, on the same map, they are a warning. Today they are read in five different buildings by people who have never met.

Pathogen genomes are not human genomes. Common standards must also include a distinction we have been careless about. Sequencing a virus is not sequencing a person. Pathogen genomics reads the intruder; human genomics reads the host. Conflating them frightens communities, invites litigation and stalls consent - while pretending the distinction is absolute ignores that samples come from people and metadata can re-identify.

The answer is to write the firewall into the architecture: pathogen data open and rapidly shared, human identifiers minimised and governed strictly under the data protection framework, with no emergency waiver. Alongside it, settle access and benefit-sharing now, in calm conditions, rather than discovering

during the next crisis that we supplied the samples and queued for the countermeasures.

One Health will not be mainstreamed through a dedicated scheme. It will be mainstreamed by being written into programmes that already have money, staff and political attention. With its established strength in infectious disease biology, pathogen genomics and wastewater-based epidemiology in one of India's most spillover-prone landscapes - a state where dense livestock, coastal wetlands, forest-settlement boundaries and cyclone-driven displacement intersect - the Institute of Life Sciences, Bhubaneswar is well-kitted to become an anchor of India's One Health architecture: a regional sequencing and analytics hub that reads human, animal and environmental signals on the same map, in the same week, and turns them into early warning rather than after-the-fact confirmation. Recently it had hosted a quality national symposium on the subject.

Wastewater surveillance should be a standard deliverable of Smart Cities, AMRUT and Swachh Bharat, not a research pilot - it is population-level, non-invasive, cheap, and indifferent to whether people seek care. This matters most in tier-two and tier-three towns, which are now urbanising and polluting faster than the metros while carrying a fraction of their laboratory capacity, and where peri-urban dairies, backyard poultry and untreated sewage sit within metres of each other.

Livestock health must be treated as public health infrastructure, not only as farm economics. Biodiversity protection and eco-sensitive zone management must be read as outbreak prevention, because every hectare of habitat fragmentation shortens the distance between a wild reservoir and a human lung. And the Ayushman Bharat Digital Mission should carry a One Health data spine from the outset, rather than retrofitting one later at ten times the cost.

Then the people. Put One Health into MBBS, BVSc, nursing and public health curricula. Give the ASHA worker and the para-veterinarian a single reporting channel. And protect the farmer who reports: if naming a district collapses its trade and culls its herds, reporting stops, and the most sophisticated laboratory network on earth goes blind. Trust is not a soft consideration here. It is structural.

Somewhere tonight, a virus is copying itself with an error in it. We cannot prevent that: it is what biology does. What we can decide is how long it takes us to notice - a wastewater sample in week one, or an intensive care unit in month eighteen. That interval is not set by the state of our science. Our science is ahead of us. It is set by whether we are willing to give a good idea a legal body, a standing budget and the authority to ask twenty-five ministries the same question on the same morning.

One Earth, One Family, One Future. India should finish the sentence. Anticipation is not a technology; it is a way of organising ourselves, agreed in advance, in calm conditions.

We are, right now, in calm conditions.

The Korea Herald

Stockholm's Korean Culture Festival

Stockholm is not a regular stop for K-pop groups, but Aug. 22 proved to be an exception. As part of the Korean Culture Festival Stockholm, hosted by Koreansk Kulturcentrum (Korean Cultural Centre in Stockholm), K-pop group Iyeye performed a 10-song set at Kungsträdgården, a venue with a simultaneous capacity of 7,000. The estimated number of visitors that day was about 30,000, according to the organizers.

The afternoon included Korean cultural activities such as folk games, taekwondo, and K-pop dance, as well as booths with K-product vendors. I was not at the event, but I watched a YouTube recording. I also spoke to one of the organizers.

"The festival ran from noon to 6 p.m. and, from the YouTube video, the audience area was packed - primarily with teenagers

and young adults. Some held handmade signs including photo boards that celebrated individual members of the group.

Given that Iyeye had a 45-minute set, they appeared to be the main focus of the day. Members Won Hwayeon, Taerin, Rahee, Kasia, Mei and Sasha all seemed very comfortable speaking English to the crowd. I strongly believe K-pop fans are people who live where fewer groups visit are starving for concerts and are incredibly enthusiastic.

Dahae Choi, creative director of Hifire Production, who served as the artist casting and coordination manager for the event, told me, "The audience response was even more enthusiastic than I expected. What stood out to me was how K-pop fan culture itself has travelled along with the music. People are

no longer just watching a performance but are actively participating in it as if they were at the concert venue in Seoul." Dahae is a veteran of Korea's K-pop industry, but has lived in Sweden for more than a decade.

It is a personal crusade for her to bring K-pop and K-culture more generally to her new home of Sweden. Those who believe in promoting Hallyu owe members of the Korean diaspora like Dahae a debt of gratitude. Only by living in a country can you begin to understand how to tap into their curiosity about Korea and the Korean Wave.

While some audience members were Iyeye fans, many would have been less familiar with this young group. Dahae further explained, "It was especially fun to see local parents and first-time observers

standing next to fans who knew every lyric in Korean. Some made their own signs and fan items and were fully emotionally invested. That contrast really showed how engaging and contagious the energy of K-pop can be."

To both old and new fans alike, from my viewing of the video, Iyeye did not disappoint. They performed mostly their own songs, including the personae favorite, "Nerdy" (which I previously heard at last year's KCON in LA).

The audience was also invigorated by two cover songs - "As If It's Your Last" (originally by Blackpink) and "Dope" (originally by BTS). The balance between doing one's original songs versus covers is difficult for newer groups to navigate, but I think this was the right balance. Also, who can quibble with their excellent choices?

Letters To The Editor | editor@thestatesman.com

Learning and fear

Sir, This refers to the thought provoking article, "Authority and respect," by Dr Arpita Basu Roy, published today. There was a time when the sound of a ruler striking a desk, or the sudden sting of punishment on a child's palm, was regarded almost casually as part of education. Generations grew up with the comforting explanation that a teacher punished a child because the teacher cared - that pain was sometimes necessary to shape character.

But there is a profound flaw hidden inside that familiar justification. A five-year-old child becomes a better learner because fear has entered the classroom. Fear can make a child sit still, lower the voice, memorise an answer and obey an instruction; but it cannot make the mind curious. It may produce compliance, but compliance is not learning; it may produce obedience,

but obedience is not character. Genuine education begins precisely where fear ends: in the freedom to ask, to wonder, to make mistakes, to say "I do not understand," and to ask "Why?" without fearing humiliation or punishment. A classroom may be perfectly silent because every child is listening - or because every child has learnt that speaking is dangerous. The silence may look like discipline from the teacher's desk, while from inside the child's mind it may be the beginning of intellectual surrender.

More disturbing still is the use of fear to conceal a teacher's own uncertainty. Sometimes a child's question reaches a place where the teacher's knowledge ends. The question may be innocent, but profound; the doubt may expose a gap in the lesson - or in the teacher's preparation. At that moment, the easiest escape is not to say, "I do not know; let us find the answer," but to create a cloud of authority around the question: discourage

it, ridicule it, dismiss it, or frighten the child into silence. Fear then becomes a smoke screen behind which inadequate knowledge can hide. A classroom should produce questioning minds, not obedient shadows. Yours, etc., Narayan Vikramundayur, Thrissur, 24 September.

Disturbing

Sir, The latest revelations about the Election Commission of India are deeply disturbing - and they cannot be brushed aside as an internal disagreement.

Two Election Commissioners reportedly raised objections as late as 14 days before that crucial decisions were taken without their knowledge. Some objections reportedly concerned adding and deleting voters and control over electoral databases. The ECI insists that its final decisions were unanimous. But that only makes the unanswered

questions more serious.

The Election Commission is a constitutional institution, not the personal domain of one officer-holder. No individual should ever appear bigger than the institution they occupy. When the authority entrusted with protecting citizens' voting rights faces questions about transparency, procedure and internal accountability, every Indian has the right to demand answers. This is not about one party or another.

It is about the credibility of India's democracy. Power without transparency is dangerous. Authority without accountability is worse. Every objection must be examined. Every decision must be open to scrutiny. Every citizen must have confidence that their right to vote cannot be compromised behind closed doors. Democracy demands nothing less.

Yours, etc., Noopur Baruah, Tezpur, 24 September.

SATURDAY INTERVIEW

'Spend 6% on education'

For him, politics runs in the blood, even though he has taken on the avatar of an educationist and is highly successful at it.

The city of Vellore, known for its historic fort and the 1806 mutiny of Indian sepoy that rattled the British East India Company nearly half a century before the First War of Independence in 1857, has today emerged as a prominent landmark on India's education map. A former Tamil Nadu minister and founder of Vellore Institute of Technology (VIT), Govindasamy Viswanathan, popularly known as GV, was a young MP who rubbed shoulders with titans like Acharya Kripalani, Ram Manohar Lohia, Indrajit Gupta and legendary communist leader AK Gopalan, among others.

In this interview with M C Rajan, GV reminisces about his plunge into politics at an early age and his turn as a builder of the VIT empire.

Excerpts:

Q: What prompted your political plunge?

A: Right from my school days, I was drawn to the DMK. I was in the 10th class when, for the first time, I attended a public meeting of Anna (DMK founder and former Chief Minister CN Annadurai). It was 1954, 13 years before the party was swept to power, and the occasion was Anna unveiling a statue of Gandhiji at Gudiyattam. Along with a few friends from my village, I went there on a bicycle. Spartan in his lifestyle, Anna was a great orator who turned the DMK into a massive political force through mass mobilisation.

Q: With many stalwarts in the DMK, how did you get the ticket in the 1967 Lok Sabha election, simultaneously with the Assembly poll?

A: In 1963, after completing my Law degree and enrolling as an advocate, I got an opportunity to speak for 10 minutes in a meeting with Anna on the dais. It was a special meeting, and attendees had to pay an entrance fee for the party fund. My speech helped secure a place for me with Anna. Later, recalling that speech, he told senior party colleagues in Madurai that I was a talent for the party and should be sent to Parliament. Then Chennai Mayor Minor Moses, my Law classmate, who was privy to that, disclosed it to me.

At the December 1966 Vingambakkam DMK conference, I was expecting my name to be announced for the Vandavasi LS seat. Candidates were announced except for Vandavasi. The DMK contested 25 seats, leaving 14 to allies, including the Swatantra Party led by Rajagopalachari (Rajaji), CPI(M) and the IUML. When Duraimurugan and L. Ganesan took me to Anna, he told us, "Give me some time. Dharmalingam, former MLA, is a senior leader and district secretary. He is in contention and had to be pacified. Viswanathan is an MA BL, well-read and more educated than me. He should be sent to Parliament." We had such leaders, but for Anna, I would have been a lawyer.

Q: How was the campaign?

A: The party gave Rs 4,000 for election expenses from Rs 11 lakh collected at the Saidapet rally in Chennai. My opponent was M Krishnasamy of the Congress. We were batchmates in the Law College. We exchanged pleasantries and had conversations during the campaign, much to the surprise of the DMK workers and functionaries. Once, we were at Arni at 3 am and Anna, who was unable to canvas in four towns, asked the party functionaries to take me instead of him. I won by a margin of over 85,000 votes in the 1967 election.



Q: Any interesting anecdotes?

A: Elections were held simultaneously for the assembly, and Annamalai, a retired teacher who defeated P Ramachandran, Government Whip who later became Union Minister and Kerala Governor, demanded that Anna make him the Whip, since he had defeated the incumbent. To this Anna asked him to meet D Rajaratnam, who defeated Chief Minister M Bhaktavatsalam!

Q: Your encounters with stalwarts in Parliament.

A: Once, (Ram Manohar) Lohia asked me in the Central Hall: "Why are you not wishing me?" And I replied, "I am anti-Hindi and you are a Hindi fanatic". Unfazed, he took me to the canteen, got me a coffee, and explained his position. Then, on taking leave, he said, "Tamil Vazha" (Hail Tamil), making me realise I was wrong.

When I was with Violet Alva, mother-in-law of Margaret Alva, a senior Congress MP, she asked, "Who is the boy? What's he doing here?" To this, she retorted immediately, "He is not a boy but an MP like you. If someone is youthful here, it should be from the DMK."

Q: Your memories of Indira Gandhi.

A: In 1971, she gave the party ticket to many youths. She liked me. Once an elderly relative of Mrs Gandhi was getting treatment at the CMC Hospital in Vellore. The old lady had informed the PM about Chief Minister Karunanidhi's interference. Mrs Gandhi asked me to sort it out, and as I was engaged in resolving the issue, Karunanidhi asked why I was acting against the Government. Brahmananda Reddy, a former student of Pachayappa's College in Chennai, was dispatched to meet Karunanidhi. "Neenga pannungo or else, amma panniduvango" (Either you do it or else PM will do it (dismiss your government), he told Karunanidhi, forcing him to oblige.

Q: Tell us about your journey with MGR.

A: I resigned from the DMK in 1975 and joined hands with MGR (AIADMK founder M G Ramachandran), who made me Deputy Leader in the Lok Sabha. It surprised (Atal Behari) Vajpayee and Pilo Modi, who asked, "What is happening in Tamil Nadu?" On MGR's request, I returned to state

politics and won from the Anaikattu seat.

It was then that I requested Chief Minister MGR to sanction an Engineering College for Vellore region. "Government has no money. You start one", was his response. All necessary permissions were cleared. Though MGR could not inaugurate the institution, the first statue of his is at VIT, started with modest resources.

Q: What's your assessment of Jayalalithaa since you were a minister in her government?

A: Jayalalithaa made me a minister for the first time and gave me full autonomy. I served as Food and Civil Supplies Minister, and she had once said that even opponents could not find fault with me. She was very intelligent, a big plus, but easily got angry.

Q: What ails our higher education system?

A: Privatisation of education is not a solution. The first freebie should be free education. We are lagging far behind in offering higher education. Private college fees are high, but Tamil Nadu is comparatively better because of Christian missionaries. Only through quality education will economic disparities come down. Disparity is higher in India than in the US, with the top 10 per cent owning 80 per cent of wealth.

India should spend 6 per cent of GDP on education. There should be healthy competition, which is not there at present. The affiliating system is a sort of slavery, and it should go. We have not yet grown to international standards in education. For medical education, people go everywhere except Pakistan.

Social sciences are relegated and do not get the importance they deserve, but we need more economists and social scientists. South Korea offers a model for teachers' salaries and training.

100 Years Ago



Front page of The Statesman dated 26 September 1926

OCCASIONAL NOTE

The South African delegation arrives in Calcutta to-morrow for a very busy three days. If their digestions survive the strain, they will have little cause to complain of their welcome here or in any part of India, and they will have had ample opportunity of learning that there is unanimity in the country on the Natal Indian problem. The deputation comes to this city at a time when many are away and the energies of the rest are relaxed after the long heat and rains, but there is no sign of lassitude in the programme arranged for them. Lunches with the Rotary Club and the European Association and dinner with the Calcutta Club are the chief gastronomic items, and the exercise thus necessitated will be taken in visits to the School of Tropical Medicine, the Bose Institute, and some of the colleges of the city. All this will persuade our visitors that here is a strenuous centre of civilization even in September. Their visit is far too short for Calcutta's wishes but they are severely rationed in time; they have to see much and meet many in their month. Fortunately for themselves they are spared the strain of making political speeches. They are in India to gather information, not as diplomatic representatives with a message to deliver, and all classes — including we hope our City Fathers — will unite in giving them a hearty welcome.

News Items

OLD AGE PENSIONS

SCHEME WORKING WELL AND SMOOTHLY
(British Official Wireless.)
Rugby, Sept.

Sir Kingsley Wood, Parliamentary Secretary to the Health Ministry, speaking at Newcastle said the machinery of the new Widows and Old Age Pensions Act was working smoothly and well. Over 260,000 pensions in Great Britain were in operation, covering over half a million persons. Sums paid in the new pensions now amounted to nearly a quarter of a million sterling per week, and this amount was steadily rising.

FIGHT TO CONTINUE

MR. COOK'S COMMENT ON PREMIER'S LETTER

The Cabinet discussed the coal situation for two hours to-day. Mr. Cook, after reading the letter which the Premier sent to the Federation, said that the Government persisted in their attitude he saw no sign of an end to the struggle. The Miners' Executive meets on Monday to decide on the course of action. — Reuter.

SENTRY STABBED

PRISONERS' ESCAPE FROM POLICE CUSTODY

BOMBAY, SEPT.

Babu Chasmawalla, a notorious dacoit, has once again escaped from custody. He got away at about four in the morning from the Bandra police cell along with three other under-trial prisoners. It appears that Chasmawalla had removed the bolts from the prison door, dashed out with his three companions, attacked the sentry, stabbed him with his (the sentry's) own bayonet and made off. It was early this year that he escaped from the Esplanade Police lockup by breaking through the strong wire fencing of a window and was with great difficulty secured in July. He was sentenced to two years rigorous imprisonment which he was undergoing when he made good his escape again to-day. Chasmawalla was also undergoing trial before the magistrate of Bandra in connexion with a series of house-breaking and theft charges.

How lean should Indian firms be?

SAYANTAN KUNDU AND
ADITYA BANERJEE

Working capital has again come into focus for Indian businesses. The July manufacturing PMI, released in early August, showed Indian manufacturers rebuilding input stocks, while finished-goods inventories rose at their fastest pace in more than 11 years. Parliament has also recently amended the MSME law to address, among other issues, delays in payments. Both bear directly on a familiar corporate-finance problem — how much money should a firm allow to remain tied up in inventories, receivables and other short-term operating assets?

Working capital is central to a firm's day-to-day operations. In simple terms, it is the money committed to inventory and receivables after taking into account short-term operating liabilities such as payables. The cash conversion cycle (CCC) measures how long that money remains tied up before sales are converted back into cash.

For years, the dominant advice has been to keep this cycle lean. The intuition is easy to understand. Faster inventory turnover, quicker collection from customers, and disciplined payment management release cash that can be used elsewhere, primarily in capital expenditure. Drawing on the same trade-off logic used in

capital-structure theory, researchers later argued that firms should aim for an optimum level of working capital. Too little can cause stock-outs or liquidity stress; too much leaves scarce capital sitting in low-return assets. Studies based largely on US and European firms often found an inverted-U relationship between working-capital efficiency and firm performance, encouraging managers to benchmark themselves against an industry norm.

That prescription is harder to apply without qualification in an emerging market such as India.

Indian manufacturers face operating conditions that complicate this prescription. Supply chains can be disrupted by infrastructure bottlenecks, regulatory changes, geopolitical shocks or sudden movements in oil and freight costs. Suppliers are not always equally reliable. Distributors may expect generous credit, especially where bargaining power rests with the buyer. Recovering overdue payments through the legal system can take time. And the cost of running out of a critical input may be far greater than the financing cost of carrying a little more inventory.

Under these conditions, a low cash conversion cycle is not always evidence of superior management. It can also mean that the firm has very little room for error. In an earlier study, we examined this question across 11 major Indian manufacturing industries. We

asked whether Indian firms behaved as standard working-capital theory would predict, that is, by moving towards an industry-level optimum, with capital markets rewarding firms as they approached it. The evidence did not support that pattern. Instead, the relationship between the cash conversion cycle and risk-adjusted excess stock returns, or alpha, was asymmetric. In our sample, the estimated threshold was roughly 84 days. Below that level, changes in the cash conversion cycle had no statistically meaningful effect on alpha. Once the cycle moved beyond the threshold, however, the association turned sharply negative.

For managers, the findings may be useful. If a company's cash cycle is already comfortable within a safe range, squeezing another few days out of inventory or customer credit may do little for its market valuation. Once the cycle begins to stretch well beyond the firm's normal range, the same working capital is more likely to signal inefficiency than a prudent operating buffer.

Opportunity cost increases beyond the threshold. Cash locked in excess inventory or slow-moving receivables cannot finance machinery, technology, capacity expansion or other capital expenditures. An unnecessarily long cash cycle can therefore affect both long-term growth and short-term liquidity.

Managers should therefore identify the point beyond which their own



cash cycle begins to signal operating or financial strain. A breach should prompt a closer look at what is driving it. Are inventories rising because demand has slowed? Are customers taking longer to pay? Has supplier reliability deteriorated? Identical CCC numbers can conceal quite different operating conditions.

Investors and analysts have reason to watch the same movements. A persistently rising cash conversion cycle may reveal weakening collection discipline, inventory accumulation or declining bargaining power before those problems reflect in earnings.

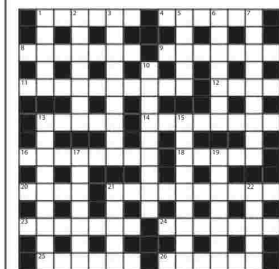
The 84-day estimate from our study should not be read as a fixed rule for every company or industry. Firm-level thresholds will differ with production technology, customer mix, supplier dependence and the reliability of

logistics and credit. Our results suggest that market valuations are more sensitive to excessive working-capital inefficiency than to incremental improvements in an already lean cash cycle.

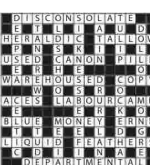
This distinction is particularly relevant today when inventories, payment cycles and the cash available for investment are again under scrutiny. Lean working capital remains good financial discipline, but managers should focus on the point at which the cash cycle begins to constrain investment or create operational strain. That threshold will vary across firms, depending on their production structure, supplier relationships and customer credit conditions, and should therefore be assessed in the context of the firm's own operating environment.

The writers are, respectively, Assistant Professors of Finance at IMI, Kolkata and Jyotirupa Institute of Management, Noida. Views are personal.

Crossword | No. 293592



YESTERDAY'S SOLUTION



ACROSS

- 1 Government-funded body gives Dame Mary reduced work (6)
- 4 Centrally heated room mostly being used for procreation (2,4)
- 8 The bloke's right-wing past (7)
- 9 Killer stalks Frenchman in Spanish location (7)
- 11 Yankee separates two poets with identical cuts in brawl (10)

DOWN

- 12 Top bishop has Father Ted defrocked (4)
- 13 Stroke stomach before beginning on legs (5)
- 14 One of Elgar's variations incorporated into finale and added to (8)
- 16 Holy man bores posh couples on the next floor (8)
- 18 Bread making instruments (5)
- 20 Type of music club (4)

DOWN

- 1 Split leftover capital lady (7)
- 2 Anoint a Byzantine Edward island (9)
- 3 Servicemen captures a foul-mouthed nationalist (9)
- 5 Slender king's figure (5)
- 6 Old stage is a cavalryman? Sounds like it (7)
- 7 Dicky perished after overwhelming century breaks (9)
- 10 Wife's so nimble during dance movement (6,5)

DOWN

- 13 A saucer, perhaps from Ganymede? (9)
- 15 America supports strike on Prince Edward island (9)
- 17 Giving a name to bird and fish (7)
- 19 One lacking belief is given dabs of accessories after armed robbery (11)
- 21 Singular lame gaps after raising a stink (5)
- 22 Architectural feature in Kosovo location (5)

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

The Tribune

ESTABLISHED IN 1881

Trump-Xi summit

Extension of trade truce signals status quo

THE Washington summit between US President Donald Trump and Chinese President Xi Jinping was spectacular but not very substantive. Beneath the pageantry, the meeting exposed how deeply intertwined — and how sharply divided — the world's two largest economies remain. The clearest outcome was an extension of their trade truce. They secured another two months, but the fundamental disputes remain: tariffs, Chinese purchases of American goods, rare-earth supplies and US restrictions on advanced technology. For businesses, short-term relief is not the same as a durable settlement.

The symbolism of the summit was hard to miss. Trump proudly presented a renovated White House complex and hosted an elaborate state dinner. On Taiwan, the stakes were understandably high. Xi urged Washington to oppose Taiwan's independence and handle the issue with what Beijing called prudence. The US has long maintained an ambiguous position, supporting Taiwan's ability to defend itself while not formally recognising its sovereignty. Xi's reference to the "Thucydides Trap" was another reminder of the strategic challenge confronting both nations. The concept describes the danger of conflict when an established power faces a rising one. The Chinese President also called for military dialogue and stronger crisis prevention mechanisms. Such overtures matter precisely because disagreement between Washington and Beijing extends beyond economics into the spheres of security and technology. Artificial intelligence (AI) illustrated the divide. Trump emphasised avoiding new guardrails, while Xi argued that AI must remain under human control and serve public welfare. Their different approaches suggest that cooperation in this field will be difficult.

Despite the absence of a dramatic breakthrough, the summit's significance lies in whether Washington and Beijing can turn continued communication into practical stability. A trade truce can expire, the tech race can intensify and tensions over Taiwan can sharpen. The harder — and more consequential — task is keeping competition from becoming confrontation.

Job scheme

Address the sharp decline in numbers

THE loss of 9.56 crore workdays of rural employment in July-August compared with the corresponding period last year — flagged by the Samyukt Kisan Morcha (SKM) citing the Ministry of Rural Development data — throws up serious questions. According to the farmers' body, 20.21 crore person-days of work were generated during the period as against 29.77 crore in 2025. These figures challenge the Centre's claims that the newly rolled out Viksit Bharat Guarantee for Rozgar and Aajeevika Mission Gramin (VB-G RAM G) Act is an enhanced version of the Mahatma Gandhi National Rural Employment Guarantee Act (MGNREGS). The focus is back on the red flags raised when the structural changes to the flagship scheme were announced.

While a combination of factors may well have played a part in this sharp decline, the Centre cannot wash its hands of the matter. It must address the issue that has cropped up at the very outset — is the new rural job scheme inherently restrictive in its shape and form? Shifting from a centrally-funded, demand-driven model to one where most states must now contribute 40% of the cost poses a major hurdle. Although a temporary pause in work during the sowing season, delays in transitioning from the erstwhile scheme and lower migration of labourers are plausible contributory factors, they alone cannot explain such a huge dip in employment generation. Something is fundamentally amiss.

The argument that a growing economy no longer requires an employment guarantee to combat rural joblessness is flawed. The scheme is a lifeline for millions of Indians. A legal framework for employment guarantee is meant to free them from dependence on the State's discretion. If it is strictly budget-driven, cracks are bound to show. In such a situation, a robust watchdog and accountability provisions are essential.

ON THIS DAY...100 YEARS AGO

The Tribune.

LAHORE, SUNDAY, SEPTEMBER 26, 1926

Mutual recrimination

IT was a fine example which Pandit Motilal Nehru set when in the course of his Cawnpur speech he resolutely refused to take any notice of a leaflet attacking him and his party which had been circulated at the meeting. He was actually challenged to answer the allegation made in the leaflet. "No," he said, "I will not answer them. They will be answered by Madan Mohan Malaviya and Lala Lajpat Rai who, I understand, will soon be here and to whom I am sending a copy of this leaflet." In our opinion, this is exactly the way to do it. Our leaders are never tired of declaring that they are fighting for principles and not for any personal ends. They are never weary of saying that they do not believe in personal recrimination and in that spirit of intolerance which is often displayed by a section of their followers. Why should not the leaders on one side, then, leave it to the leaders on the other to sternly rebuke their followers, when the latter deviate from the path of propriety and indulge in personal attacks? And why should not those in whom this confidence is placed show by their actual conduct that they fully deserve it? Public life would be a better, nobler and purer thing than it is if our leaders cultivated this habit of keeping their followers within bounds. Now that the Pandit has come to Punjab, he has an excellent opportunity of practising the principle which he so nobly preached in his Cawnpur speech. He must have read that at the recent meeting in Lahore addressed by Malaviya and Rai, a pamphlet was circulated, making a bitter personal attack on one of India's most distinguished public men.

THE GREAT GAME

JYOTI MALHOTRA

THE old order is constantly a-changing, yielding place to the new, but in the last 24 hours it has seemed as if both the old and young are expressing their frustration with the powers-that-be.

The first, the patriarch of Punjab politics, 84-year-old former chief minister Capt Amarinder Singh, told *The Tribune* that as CM from 2017-2021, he brought up the matter of cross-border drones bringing in drugs with both PM Narendra Modi and Home Minister Amit Shah; that when his pleas went unheard, he concluded that "Delhi doesn't understand Punjab." Singh went on to add that the BJP had never consulted him on matters of both policy and politics in the state and that he had gained nothing by joining it.

The senior politician's angst is matched by the young Cockroach Janta Party's angry outburst at its press conference in Delhi on Thursday, demanding the scalp of Chief Election Commissioner Gyanesh Kumar ("Gyanesh, it's done bro!"), within 48 hours, in the wake of revelations in the *Indian Express* that the CEC did nothing about the exclusion of voters on EC software despite being allegedly aware.

The key question that arises from both sets of remarks is about the limits to political ambition — and whether age should have anything to do with it. Can you, for example, disregard the roar of an ageing lion to your peril, knowing he may still have one last *shikar* up his sleeve? Should the BJP be more considerate of Amarinder's criticism of his own party and thereby his capacity to damage it in Punjab, in the run-up to this important Assembly polls, or have

Churning and change

Amarinder Singh's angst is matched by Cockroach Janta Party's outburst



KEY QUESTION: Should the BJP be more considerate of Amarinder's criticism of his own party? ❗

they already consigned him to the King Lear line-up?

Equally, can you ignore the prattling of an outfit that's not-even-a-political-party, keenly aware that the last time you came down heavily on the CJP protest you had to pay with the head of your own Education Minister?

It's important to separate the noise from the silence that has followed the *Indian Express* story, although it's clear the state is gathering itself in. As the 48-hour CJP deadline for the resignation of the CEC approaches, the barricades are back at Jantar Mantar. Gyanesh Kumar has cancelled his visits to Meerut and Varanasi.

Not just the Opposition, even BJP allies like Chirag Paswan and Upendra Kushwaha are now beginning to push back and demand the CEC "dispel the misgivings in the minds of the people." Remember that Paswan had asked questions about Amit Shah's decision to impose the uniform civil code in all BJP-run states, and had demurred over Bihar.

Certainly, the country is divided down the middle. The CJP has been carefully expanding its ambit since the July protest in Delhi — we can't seem to take our eyes off CJP videos exposing the decay in government schools

Certainly, the country is divided down the middle. The CJP has been carefully expanding its ambit since the July protest in Delhi.

in their #SchoolThikKaro campaign, while Abhijit Dipke, himself a Dalit, seeks to place the national attention on mental health issues after the death of a student in IIT Bombay, across caste, class and gender.

Certainly, the rise and rise of the CJP has forced the media to do its job, both in quizzing the ruling party and the Opposition. The question that asks itself is why haven't any of the traditional political parties — except for AAP, which has put a lot of effort into its Schools of Eminence project in Punjab, not with unmixed results, but at

least it has tried — bothered to pay attention to the all-important subject of education, except when they were setting up private universities and colluding with the political elite to transfer resources at cheap rates to those universities? If you were going to shed crocodile tears for the young, at least pretend that their future affects you too.

The CJP is not a political party and doesn't pretend to call itself one, but it's showing the mirror to us all. Look this is happening in your own backyard, how come you haven't noticed before? The truth is that we have noticed, but that we are either far too complicated, or too cynical or simply don't care enough.

Still, the impact of the alleged dysfunction at the heart of the Election Commission is bound to have repercussions as elections near — besides Punjab, Uttar Pradesh, Manipur, Goa and Uttarakhand are going to the polls in February. Tiny Goa has been in the eye of the storm in the *Indian Express* leaks, which detailed how 97 voters could not get themselves on the rolls despite official attempts being made to do so.

There are two views how this is going to unfold. The more charitable one gives credit to Congress

leader Rahul Gandhi, arguing that his "vote chori" campaign has led the argument for some time, and that if distrust in the neutrality of the Election Commission creeps in, his party will be the primary beneficiary.

The second view hints at the tides swirling within the BJP and the RSS and how the Election Commission revelations will impact the positions of top party leaders. Certainly if the BJP juggernaut is dented in any of the states going to the polls, it will affect the fortunes of those jockeying for the affections of those at the top.

According to the latter view, Rahul Gandhi can hold as many rallies as he wants in cities like Indore, but when change comes, it will come from within the BJP. Not that the BJP can insulate itself from tremors from the ground — who, for example, ordered the use of pellet guns on unarmed students during the CJP protest in July? We don't know the answer to that, but when it comes, it is certain to trigger an avalanche that will disturb the party's power structure.

For the time being, the party's power structure seems pretty strong and confident. In the last Assembly election cycle, it spent Rs 529 crore, outspending every other party — Rs 286.99 crore in West Bengal alone — while the Congress spent Rs 42.08 crore. The BJP's continuing access to funds remains remarkable.

Question is, if this incredible strength will also give its leadership the wisdom to listen to dissenting voices within, like that of Amarinder Singh of Punjab, or would they rather consign him to the Margdarshak Mandal already stacked with senior BJP folks. Problem is, even the Mandal isn't safe from the prying eyes of the outside world anymore — none other than former deputy PM and architect of the Ram Mandir LK Advani has himself received a letter from the venerable Election Commission asking him to prove his credentials in the ongoing special intensive revision exercise.

THOUGHT FOR THE DAY

May we never confuse honest dissent with disloyal subversion. — Dwight D Eisenhower

The privilege of road repair

COL PS RANDHAWA (RETD)

ROADS in Jalandhar are like those in many other cities of India. Most of them are broken, potholed and in need of repair and recarpeting. We are now quite used to living at the mercy of the system/administration.

A couple of months ago, the Prime Minister visited our city to inaugurate a renovated railway station. He was to travel on a 1.5-km stretch of the national highway, from the helipad gate to the station. Within days, this not-so-bad road was recarpeted and made so smooth that it resembled, to borrow a politician's words, the cheeks of a renowned heroine of yesteryear.

However, that stretch stood in glaring, mocking contrast to the surrounding roads. Had the PM travelled to a few more places in our city, we would have been blessed with several better roads.

Coming to our colony's roads, recarpeted about three years ago (after much pleading by the residents), they started developing potholes after a few months. As time passed, the potholes grew bigger and dustier. Unfortunately, since the MLA of our constituency is from an Opposition party, we — the voters — were condemned to suffer neglect at the hands of the authorities. Numerous visits by RWA (resident welfare association) members yielded many promises but no results.

Amid the buzz around the next elections, the ruling party's local in-charge suddenly began taking an interest in our area. Sensing a silver lining, a delegation of residents met her during a visit. We presented our grievances alongside a written appeal, and she assured us that the matter would be addressed. We were informed that after the recarpeting of a nearby village road, some material would be used to fix the potholes of our roads.

We kept our fingers crossed as the nearby road was recarpeted. When that work was completed, members of the repair team finally arrived in our colony with heavy machinery. We hurried out to welcome them and pointed out the worst potholes. To our dismay, they ignored us and moved toward a road junction that was already in a relatively good condition. The repeated "call attention" appeals to the *munshi* of this team fell on deaf ears. After most of the repair material had been used on that road, the leftover was utilised to fix a few potholes. The team then declared that the material allotted to us had been exhausted.

When we pressed him for more information, the *munshi* sheepishly disclosed that the contractor had told him to give priority to the road in front of the home of *Bhaaji*, an employee of the municipal body. We all resigned ourselves to our fate. Ultimately, the remaining potholes were repaired through funds collected by the RWA.

Herein lies the message: to enjoy basic civic facilities, one has to be a cog, big or small, in the giant machinery of the system. The Jalandhar-based writer served in the Dogra Regiment

LETTERS TO THE EDITOR

Managing conflicts

Refer to 'Why it's getting harder to end wars', bringing conflicts to an end has become structurally difficult. Modern economies, when faced with slow growth, overcapacity and intense competition for markets, energy and resources, often turn outward. Rival blocks then seek to secure supply chains, spheres of influence and strategic advantage, and military postures harden accordingly. Negotiations do not fail merely for want of goodwill or clever diplomacy. They fail because the underlying pressures that produced the confrontation remain unresolved. Until those deeper economic and geopolitical compulsions are addressed, we may have to settle for managing conflicts rather than resolving them.

MANU KANT, BY MAIL

Collective responsibility

Apropos of 'Women's safety', fighting violence against women is not the responsibility of one institution alone; it is a continuous and collective responsibility of the State, society, families and every individual. Women's safety cannot be reduced to momentary outrage after a horrific incident. It requires continuous policing, swift justice, safer public spaces, responsible institutions and a fundamental change in social attitudes. Every woman or girl deserves to feel secure at home, at work, on the streets and in public spaces. A truly safe society is one where women do not have to organise their lives around fear.

GAURAV BADHWAR, ROHTAK

People will finally decide

With reference to 'Punjab needs a political renewal to turn the tide': populist and vote bank politics has led to growing public cynicism. In the present political landscape, the bigger parties, affected by ideological differences, defections, internal splits and opportunistic alliances, are adopting various strategies to win the upcoming Assembly elections. The ball will finally be in the people's court. They should vote wisely to choose educated, visionary and dedicated leaders who can improve governance and institutions.

DS KANG, HOSHAIRPUR

Buying votes through freebies

Apropos of 'Mawan Dhiyan scheme challenged in high court', to roll out freebies with the purpose of securing votes is nothing short of corruption. Buying votes by one method or the other is a distressing trend which is not desirable in a democracy founded on the tenet of fair and free elections. The Punjab government has set no family income ceiling for availing of its benefits, because of which even women of well-to-do families whose husbands receive hefty pensions and with children settled abroad are taking the stipulated amount. Providing free higher education and creating jobs for women according to their merit could have been a better option.

SADHNA SAINI, BY MAIL

ECI crisis is not an internal matter

Refer to 'ECI must answer'; decisions made without consensus or proper legal recourse undermine the credibility of the electoral process. The ECI cannot afford to treat these serious concerns as mere internal administrative quibbles. It owes the nation a transparent, thorough response to restore faith in the democratic process. Accountability must be fixed for any wrongdoing and corrective actions must be taken so that people's faith can be restored in this independent constitutional body.

RAMESH SINGH KHALSA, NANWANSHARR

Tatas in a state of flux

What should India seek to preserve when an institution that has been part of the nation's economic and social evolution for more than a century and a half enters a period of structural change? The Tata story is unusual because enterprise and social purpose became intertwined in a manner rarely seen at comparable scale. Where and when the State has failed, the Tatas have, at times, intervened. This is not intended as an indictment of the State, nor as an argument that private enterprise can substitute for public institutions. The State must remain the principal custodian of justice, welfare and the public good. Rather, it is an observation about the moral responsibility that sometimes accompanies institutional capacity.

COL LJS GILL (RETD), BY MAIL

Bhagat Singh does not return alone



HARISH JAIN
AUTHOR AND PUBLISHER

A T a gathering of young protesters today, Bhagat Singh may be visible on a poster, Mahatma Gandhi present in the chosen method and Ambedkar carried in the form of the Constitution. One gives expression to their anger, another shapes the manner in which it is expressed and the third transforms grievance into a claim of citizenship.

The three do not appear together because their differences have disappeared. They differed greatly in temperament, experience and political thought. Nor have the young produced a philosophical reconciliation among them. They have done something more practical: drawn from three separate, sometimes conflicting traditions to create a new language of protest.

The form of protest has entered a new stage. Many contemporary protests begin with a particular grievance—an examination, recruitment process, university dispute, workplace injustice or administrative indifference. Participants may be connected less by permanent organisation

than by a shared experience of being unheard.

Digital communication has transformed mobilisation. Young people can circulate evidence, challenge official accounts and reach a national audience before established organisations respond. A movement may gather steam without a commanding leader or settled ideology, gaining independence and reach but remaining vulnerable to misinformation, fatigue and dispersal.

The contemporary protester stands in a different relationship to authority. The protester asks it to honour commitments already made. This is why the Constitution has moved beyond courtroom and legislature into the street, becoming both a shield for liberty and equality and an accusation against institutions that depart from those principles.

Present-day protest consequently carries a productive duality. It questions the manner in which the republic is governed while claiming fidelity to the republic itself. It is at this point that Bhagat Singh, Gandhi and Ambedkar meet.

"Inquilab Zindabad" had a political history before Bhagat Singh, but he and his comrades gave it an extraordinary national presence and a developed meaning. In the Assembly Bomb Case, they distinguished revolution from "the cult of the bomb and the pistol." It meant transforming an order founded upon manifest injustice—one in which labourers created



ICONS : Protesters have drawn inspiration from Bhagat Singh as well as BR Ambedkar. ANI

wealth and peasants produced food while remaining deprived. Political freedom without social reconstruction could not complete that revolution.

Later, Bhagat Singh and Batukeshwar Dutt described revolution as the continuing "longing for a change for the better." The revolutionary spirit interrupts society's acceptance of an unjust order. This explains Bhagat Singh's appeal to the young: not necessarily a desire for violence, but a refusal to regard injustice as natural or permanent. When they raise his slogan, they give it content drawn from contemporary inequality, unemployment and insecurity. Bhagat Singh supplies the purpose of protest: an unjust order must change.

Gandhi enters through the method. Protesters may not describe themselves as Gandhians and may disagree with

Bhagat Singh supplies the purpose of protest — an unjust order must change.

parts of his social vision. Nevertheless, when they march peacefully, occupy a public space, fast, refuse provocation, or accept suffering without inflicting it upon others, they enter a political form Gandhi helped make unmistakably Indian. He

demonstrated that ordinary people without weapons, wealth or institutional power could confront the state through disciplined collective action.

Bhagat Singh came closer to this understanding than his popular image sometimes allows us to recognise. In "Why I am an Atheist," he described force as justifiable only in cases of "terrible necessity" and called non-violence indispensable for mass movements. The difference remained: for Gandhi, non-violence was a moral principle; for Bhagat Singh, it was primarily a political method. But the distance between them was not so complete that their names could never inhabit the same protest.

Ambedkar's presence creates a different tension. In his final address to the Constituent Assembly, he warned that when constitutional methods were available, civil disobedience, non-cooperation and satyagraha should not replace democratic institutions. He described such practices as a "grammar of anarchy." Yet Ambedkar is present at demonstrations in portraits, in the cry of "Jai Bhim" and, above all, in the Constitution raised before the administration and the camera.

The apparent contradiction disappears when constitutionalism is not confused with political silence. The Constitution protects speech, peaceful assembly and equality. In the protester's hands, it limits both the means that citizens may employ and what the State may legitimately do. It converts suffering into a right and grievance into a constitutional claim. The protester is not asking for generosity from the ruler, but reminding the republic of a promise it has already made.

The young have thus arrived at a political formulation of their own. Bhagat Singh gives their anger a political purpose, Gandhi gives their resistance a public method, and Ambedkar gives their demands the authority of rights. Anger without discipline may exhaust itself in violence; discipline without a demand for structural change may become mere endurance; and constitutionalism without the pressure of alert citizens may be reduced to words preserved in a book.

This alliance has emerged through protest, not from political parties or scholars. The young may not accept any of these figures in totality, but have discovered what each contributes to their circumstances. The present protest is neither Bhagat Singh's revolution reproduced, Gandhi's mass movement revived nor Ambedkar's constitutionalism followed in isolation. It is radical in dissatisfaction, largely non-violent in practice and constitutional in its claim to legitimacy. Its challenge is to turn sudden mobilisation into sustained democratic organisation.

Yet immediate grievances need not mark the limit of this politics. Collective action can enlarge understanding. Experience may then carry them from the defence of their own interests towards wider questions of justice, equality and human dignity — provided protest develops reflection, solidarity and organisation.

Bhagat Singh's birth anniversary (September 28) should not merely recall his sacrifice. A martyr can easily be imprisoned within ceremony; his portrait garlanded while his questions are avoided. At the contemporary protest site, he is present in the raised fist demanding change; Gandhi in the discipline that prevents anger from becoming indiscriminate violence; and Ambedkar in the Constitution that turns both anger and discipline into a claim upon the republic.

Bhagat Singh does not return alone. He returns as part of a political language the young have created for their own time.

For full article, go to www.tribuneindia.com/opinion

Robust urban growth vital to achieve Viksit Bharat goal



KARAN A SINGH

FORMER CHIEF SECRETARIES OF PUNJAB



ANIRUDH TEWARI

INDIA is at the cusp of an extraordinary urban transformation. Today, 37% of Indians live in urban areas; by 2036, this could rise to 40-45%. NITI Aayog projects that by 2047, this figure is likely to exceed 50%. This places cities at the heart of our journey towards Viksit Bharat by 2047.

The question is whether our cities have the financial capacity to fund this urbanisation. A NITI Aayog report, released in April, highlights this challenge and notes that municipal finances remain weak and strained, with increasing reliance on inadequate and uncertain transfers. It also notes that India's municipal bond market remains remarkably small. Between 2017 and 2025, municipal bonds raised only about Rs 3,579 crore.

If our cities are to become engines of growth and prosperity, they need finance to build the infrastructure to support that growth, and to do that, they must raise debt. The connected issue is how these borrowings can be transparent, sustainable and capable of attracting capital.

India's fiscal framework has long emphasised transparency in government finances. The Fiscal Responsibility and Budget Management (FRBM) Act 2003, enacted by Parliament, together with similar state legislation, puts restrictions on government borrowing to enhance fiscal discipline and rein in the national debt, which currently stands at about 84% of GDP (56% of Centre and 28% of states).

Article 293 of the Constitution gives the Union government a role in regulating state borrowing. The Government of India generally sets an annual borrowing limit at 3% of each state's GDP with an additional 0.5% tied to power sector reforms. Given the Central government's target of limiting its borrowing to about 4.3% of GDP, this means governments collectively borrow about 7.8% of GDP, and this figure is added to public debt every year.

Thus, if India's GDP grows at about 12% every year in nominal terms, the national debt will decrease as a proportion of GDP if this trend continues. In short, the FRBM framework augurs well for public debt sustainability in India.

City development has a multiplier effect on GDP growth; investing in building cities as centres of livelihoods and entrepreneurship leads to a much greater impact on national growth. India is not investing enough in its cities; as a result, urban growth has



CAPITAL : If our cities are to become engines of growth, they need finance to build infrastructure. PI

been tepid. Cities need access to markets to finance bankable projects.

Unfortunately, India's municipal bond market has never really taken off. Reasons for the lack of growth in the municipal debt market include weak financial and administrative capacity in local bodies, a paucity of revenue-generating municipal projects that can be relied on to repay bonds, and a lack of transparency in municipal accounts.

In 2017, the Pune Municipal Corporation raised Rs 200 crore through a 10-year bond at 7.59% for its Rs 2,264-crore 24x7 water supply project. This example shows that municipalities with credible finances can access the capital market for development projects. Yet India's municipal bond market stood at just Rs 3,900 crore in March 2026, accounting for only 0.02% of the country's

Government institutions must ensure that debt rests on the tripod of transparency, market discipline and sound financial management.

total outstanding bonds and 0.01% of GDP.

The Central government has introduced incentives to make cities financially viable and bankable under the AMRUT framework. However, the bigger challenge is to create institutions capable of leveraging limited public resources to attract greater investment and to ensure that such debt rests on the tripod of transparency, market discipline and sound financial management.

To achieve this objective for municipal bodies, in the interest of rapid urban development necessary to reach the goal of Viksit Bharat by 2047, we suggest four wide-ranging policy measures that Parliament can legislate in consultation with states.

First, city governments must be transparent in their accounts. To this end, Parliament should make a National

Municipal Accounting Code mandatory for all urban local bodies and urban development authorities, including real estate assets on their balance sheets, and introduce an Urban Growth Assessment System to forecast cities' future expenditure and revenue streams.

Second, we suggest a National Municipal Finance Model that sets benchmarks, standards, and procedures for cities' revenue assessment and collection, including property taxes, trade and professional charges, parking and congestion charges, and fees and charges for utilities, amenities and environmental services. To make this effective, we need to establish state/national-level regulators to set and revise utility charges and service fees for cities, similar to electricity regulators.

While cities contribute about 60% to GDP, municipalities themselves are starved of funds in the absence of predictable and stable devolution of revenues from the Centre and State to the cities. In most states, State Finance Commission reports are often not implemented in letter or in spirit, leaving a huge gap between what the cities deserve as devolution and what they actually receive.

Third, norms and procedures for borrowing, project financing, escrow, public-private participation and operating special purpose vehicles (SPVs) need to be standardised. This would bring trans-

parency and efficiency.

While the three interventions above would improve systems and revenues for cities, we also suggest a National Fund for Urban Development that provides equity financing for cities or city projects seeking to access debt markets.

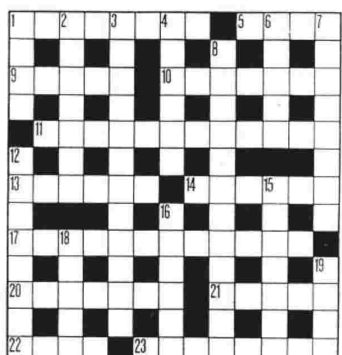
This fund can be structured as a capital pool financed through sovereign transfers from the Central and state governments to cities. A National Fund equal to 1% of GDP (Rs 3,60,000 crore) can enable cities to borrow an additional 2% of GDP (Rs 7,20,000 crore) each year. This annual urban development financing of about Rs 11,00,000 crore will be a good start towards rapid city development.

These reforms will put city finances on a sustainable path, enabling cities to raise significant levels of debt in a transparent and viable manner to support rapid urban development, create more jobs, raise wages and increase productivity among workers in India, while improving amenities, habitat, environment and living conditions.

An essential element of Viksit Bharat will be our cities becoming engines of investment, jobs and productivity. For this, the ability to borrow responsibly will always be central.

Views are personal. For full article, go to www.tribuneindia.com/opinion

QUICK CROSSWORD



ACROSS

- World's largest freshwater lake (8)
- Search thoroughly (4)
- Italian city (5)
- Representative (7)
- An unstable plan (5,2,5)
- Redress (6)
- Discuss terms with enemy (6)
- Severe reprimand (8-4)
- Tombstone in scripture (7)
- Lying flat (5)
- In that case (4)
- Distinction (8)

Yesterday's Solution

Across: 1 Like a shot, 8 Onion, 9 Pastime, 10 Splash, 11 Review, 12 Hopeless, 13 Gangster, 18 Profit, 20 Ballot, 21 Pioneer, 22 Light, 23 Hyperbole.

Down: 2 Image, 3 Entail, 4 Somewhat, 5 Topples, 6 Citadel, 7 On the spot, 11 Ring a bell, 13 Porpoise, 14 Analogy, 16 Smooth, 17 Hobnob, 19 Ideal.

DOWN

- Location (4)
- Act in a play (7)
- Place giving very close view (8,4)
- Choice (6)
- Come to mind (5)
- Centre of target (5-3)
- Spotlessly clean (5,3,4)
- Degree of slope (8)
- The inside facts (3-4)
- Hymn of praise (6)
- In that case (4)
- Give up possession of (4)

SU DO KU



YESTERDAY'S SOLUTION

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

CALENDAR

SEPTEMBER 26, 2026, SATURDAY	
Shaka Samvat	1948
Ashwin Shaka	4
Ashwin Purnimashi	10
Hijri	1448
Shukla Panchami Tithi	15, up to 10:19 pm
Gandha Yoga	up to 1:19 pm
Purnahadpad Nakshatra	up to 11:32 am
Moon in Pisces sign	
Rohitranet Purnima	

FORECAST

SUNSET: SATURDAY 18:34 HRS	
SUNRISE: SUNDAY 06:12 HRS	
CITY	MAX MIN
Chandigarh	32 25
New Delhi	33 23
Amritsar	33 24
Bathinda	35 22
Jalandhar	33 24
Ludhiana	34 23
Bhiwani	36 24
Hisar	35 24
Sirsa	35 24
Dharamsala	29 18
Manali	23 12
Shimla	25 16
Srinagar	27 12
Jammu	34 24
Kargil	25 06
Leh	20 04
Dehradun	31 21
Mussoorie	23 14



Editor's TAKE

Xi in DC: Pageantry, but little substance

The Trump-Xi summit leaves the US-China rivalry largely unchanged, managing competition rather than delivering a breakthrough

Xi Jinping walked down the red carpet at Joint Base Andrews this week for his first Washington visit in over a decade – the third face-to-face meeting between him and Donald Trump in under a year, after Busan in October and Beijing in May. The optics were unmistakably warm: a military review in the Rose Garden, a state dinner in the East Room, and both leaders speaking of mutual respect.

Beneath it, the same unresolved fault lines – trade, technology, Taiwan – remain exactly where they were. Xi's concerns were not disguised. On artificial intelligence, Beijing wants Washington to ease chip export controls and open the door to Chinese AI models, while offering rhetorical convergence on keeping AI "under human control" and pitching a multilateral governance framework built around China's newly launched World AI Cooperation Organisation.

On trade, China wants relief from tariffs and validation of the rare-earth leverage it has built, in exchange for renewing the Busan truce. On Taiwan, Xi's line hasn't moved: no separation, and "utmost caution" urged on US arms sales.

None of this travels far. Washington's own reporting shows Beijing's offer to extend the rare-earths truce to the end of Trump's term collapsed on mutual distrust before the summit even began. The May Beijing agreement – \$17 billion in annual agricultural purchases, 200 Boeing jets, new trade boards – is already behind schedule, with farm purchases undershooting and the boards still not operational.

AI cooperation, the one area both sides call promising, is constrained by the same suspicion: Beijing believes safety talk is a pretext for containment, while Washington doubts any Chinese commitment would be honoured. The realistic ceiling is a narrow, symbolic step – perhaps an incident-warning channel – not a governance breakthrough. The real story is what each side is buying with this summit, not what they're solving. Trump needs a trade win before midterms dominated by cost-of-living anger. Xi needs to project strength before his party congress, and he has spent recent weeks doing exactly that – courting BRICS in Delhi, pitching a Middle East "security architecture" in Cairo, and positioning China as the stabilising power to Washington's war-fueled unpredictability.

Iran's war, in its seventh month, has quietly shifted leverage towards Beijing: depleted US munitions stocks need the rare earths and critical minerals China still dominates.

Expect the Busan truce extended, an AI working group formalised without teeth, and Taiwan left carefully unresolved. That last point deserves attention: allies from Tokyo to Taipei worry Trump could trade Taiwan assurances for a trade headline, and nothing in his instincts rules that out.

For the rest of the world, including India, the takeaway is a fragile equilibrium, not a settled order. Two leaders too entrenched in their own judgement to concede ground are buying time, not making peace. The contest for technological and economic primacy continues exactly as before – only with better photographs.

AI enters the war room as diplomacy struggles

Artificial intelligence is rapidly becoming a force multiplier on the battlefield, helping militaries identify targets, guide weapons and compress decisions from minutes to seconds. But while the technology races ahead, diplomacy remains trapped in debates over human control, accountability and rules that may no longer match the realities of modern warfare



MD AFSHAR ALAM

Artificial intelligence has moved from the margins of defence planning to the heart of the war room, and the diplomacy meant to govern it is being left far behind. Machines now sift oceans of surveillance data and hand commanders ranked target lists in seconds. The people who set the rules are still arguing over definitions that date back to the last decade.

Washington, Beijing and Moscow treat AI as a strategic asset of the same order as air power or the nuclear arsenal. President Putin said years ago that whoever leads in AI will rule the world. President Xi has called for self-reliance and mastery across every core AI technology. President Trump has committed the United States to doing whatever it takes to lead the field. Those words have turned into budgets. The US Army trains officers on the Maven Smart System, and the Pentagon has created a Defense Autonomous Warfare Group that is absorbing tens of billions of dollars. China and Russia are pouring rising sums into swarming drones and autonomous strike systems, and the two defence ministries have held talks on how AI might aid a large conventional conflict.

The sharpest question is what happens when AI stops driving weapons and starts advising the humans who fire them. At a Congressional hearing this month, witnesses cautioned that an AI system can influence a human decision leading to a strike while the person retains formal responsibility for the final call, and that recommendations can arrive faster than officers can authenticate them, compressing the time to intervene. Responsibility becomes blurred. A commander who approves a target in seconds, trusting a system he cannot fully audit, is accountable in name while the real selection happened inside a model.

Gaza offers the most documented example of what this looks like in practice. Israeli forces used AI systems called Lavender and the Gospel to generate targets at speed, with Lavender marking around 37,000 people as suspected militants and Gospel flagging buildings and infrastructure. A separate tracking tool named "Where's Daddy?" signalled when a target entered his home, and in some cases the house was marked for bombing while the family was present. Intelligence officers described treating the machine's output as though it were a human decision, and reported that the army accepted the deaths of 15 to 20 civilians for a junior operative and more than 100 for a senior commander. Legal scholars have identified



AT THE UNITED NATIONS, THE PICTURE IS SLOWER STILL. THE GROUP OF GOVERNMENTAL EXPERTS SPENT MUCH OF ITS THREE-YEAR MANDATE DEBATING WHAT HUMAN CONTROL EVEN MEANS AND REACHED THE END OF THAT MANDATE WITHOUT A BINDING TEXT, LEAVING THE QUESTION TO THE SEVENTH REVIEW CONFERENCE OF THE CONVENTION ON CERTAIN CONVENTIONAL WEAPONS IN NOVEMBER

The writer is a former Vice-Chancellor of Jamia Hamdard, New Delhi

these practices as potentially violating the principles of distinction, proportionality and precaution.

Ukraine has become the world's largest live proving ground for the same technology. AI-enabled combat systems there are being tested at a scale seen nowhere else, and Russia has fielded AI-powered strike drones that can evade air defences, identify targets and operate offline. What one war validates spreads quickly to every arsenal watching.

Diplomacy has produced movement without much grip. At their summit in May, the American and Chinese leaders agreed to improve policy exchanges on AI, and a bilateral channel on AI governance was announced, after which Chinese officials urged the world to close the regulatory vacuum around military AI and backed rules that could eventually become binding. Yet both powers sent substantially smaller delegations to the recent Responsible AI in the Military Domain summit in Spain than they had to the 2024 meeting in South Korea. The one understanding they had quietly held, keeping AI away from the decision to use nuclear weapons, looks to be eroding rather than consolidating.

At the United Nations, the picture is slower still. The Group of Governmental Experts spent much of its three-year mandate debating what human control even means and reached the end of that mandate without a binding text, leaving the question to the Seventh Review Conference of the Convention on Certain Conventional Weapons in November. In December 2025, the General Assembly passed Resolution 80/57, and India voted in favour of it. New Delhi holds to a careful line of its own. It backs the expert process and

insists that any use of autonomy obey the laws of armed conflict with human accountability intact, while declining to support a legally binding ban. On that stance, it sits alongside the United States, Russia and Israel among the main opponents of treaty negotiations, wary of rules that could freeze its own options.

This is where AI has become a weapons danger of a new kind. The same models that draft text and design molecules can speed the engineering of novel arms and lower the skill needed to build them. Capabilities once held by great powers can pass to smaller states and to groups that answer to no state. Systems that can select and engage targets on their own already exist, are being deployed in combat, and are being procured at unprecedented scale. More than 160 countries have voted for restraint, while the strongest military powers resist anything that might constrain their programmes.

The problem forces a rethink of what a weapon is. For centuries, a weapon waited for a human to aim and fire. A system that picks its own targets breaks that assumption and asks whether a machine should ever be allowed to make the choice that ends a life. Defence ministries insist a person will always stay in the loop. That loop keeps tightening as the systems grow faster, and a human given three seconds to say yes is a supervisor in title alone. For now, the race is ahead of the rulebook by a clear margin. Whether governments can close that gap before an AI-driven error, in a crowded sky or a nuclear command chain, forces a decision no one intended is the test the coming summits and the November review will have to meet. The technology will not wait for them to agree.

Daiv Vani

WISDOM FOR A MEANINGFUL LIFE

Ordinary life could be Extraordinary

Not every spiritual figure we have heard of have renounced ordinary life. Some of them did the Sadhana and transformed from within.

Sarada Devi continued performing household duties, cooking, managing finances, receiving a constant stream of guests, throughout her life as the spiritual head of Ramakrishna's growing community of monks and devotees. Even as her reputation grew and disciples began to revere her as a living embodiment of the divine mother, she never stepped back from the kitchen or the daily running of the household. When asked why she continued such ordinary domestic work herself rather than delegating it entirely, she reportedly said that these small daily duties, done with awareness and love, were themselves a form of worship, no less sacred than formal meditation or ritual observance.

Her life quietly dismantled the common assumption that holiness requires escaping ordinary responsibilities altogether, retreating into caves or renouncing household life. Instead, she showed that the sacred can inhabit the most mundane tasks, cooking a meal, welcoming a stranger, balancing accounts, when approached with full presence and unwavering care. We often separate our "real" spiritual life, meditation, prayer, quiet reflection, from our daily obligations of work, chores, and family duties, treating the latter as unavoidable distractions rather than a genuine opportunity for practice. One can be in the normal life but lead an extraordinary life.

Today, perform one ordinary task, cooking, cleaning, routine chores, with the same attention and care you might otherwise bring only to a meditation practice. —DAIV

2ND OPINION

Every September 27 World Tourism Day is celebrated across the world. It is a day to appreciate the industry that not only is a money spinner but also connects the world. This year it is hosted by El Salvador, with UN Tourism choosing "Digital Agenda and Artificial Intelligence to Redesign Tourism" as its theme. For India, the day is also a moment to ask a sharper question: is the country monetising the one asset no competitor can copy – its spiritual depth?

The economic case for tourism needs no dressing up. Provisional National Accounts Statistics for 2023-24 put tourism's contribution to India's GDP at 5.22 per cent, and roughly 13 per cent of all employment in the country. The Ministry of Tourism and NITI Aayog jointly project wellness tourism alone could add \$18 billion to GDP by 2030.

Yet India is yet to realise its full potential. India ranks 39th of 119 countries – despite scoring in the global top ten for natural, cultural and non-leisure resources, one of only three

India's spiritual tourism: The next frontier



DIVYA BHATIA



countries to do so. The gap between resource and rank is exactly where policy must work harder: on connectivity, visa friction, last-mile infrastructure and destination marketing. This is where spirituality becomes strategy, not sentiment. India is the only country on earth that is simultaneously the birthplace of Buddhism, the home of yoga, and a living laboratory of meditation traditions stretching back millennia. Nowhere else can a traveller walk in the Buddha's actual footsteps and take a sunrise yoga class on the same trip.

The Buddhist circuit – Bodhi Gaya, Sarnath, Kushinagar, Rajgir, Nalanda, Sravasti – draws only around 1.2 million pilgrim visits a year, a fraction of the world's roughly 500 million Buddhists, concentrated overwhelmingly in Sri Lanka, Thailand, Japan, South Korea and Vietnam. India's hand strengthened considerably this July when Sarnath, where the Buddha delivered his first sermon, was inscribed as the country's 45th UNESCO World Heritage Site. That

recognition should be the trigger for a harder push: direct flights into Gaya, Varanasi and Kushinagar from Buddhist-majority countries, a unified multi-country visa with Nepal for the Lumbini leg, and monastery-standard stays instead of ad hoc guesthouses. Schemes like Swadesh Darshan and the IRCTC's Buddhist Circuit train must be scaled. The yoga and wellness story is, if anything, moving faster than policy can track it. Realising the full value of that lead needs three things New Delhi has only partly delivered: certification standards so a "yoga retreat" or "meditation centre" actually means something to a foreign traveller booking sight unseen; river and ecological safeguards around the Ganga so Rishikesh does not develop itself into the very congestion tourists are fleeing; and a coordinated diplomatic push, riding on the goodwill already built by International Yoga Day to position yoga and Vedic meditation as India's answer to Japan's onsen tourism or Bali's wellness branding.

This year's World Tourism Day theme of AI and digital tourism is not a distraction from that spiritual case – it is the delivery mechanism. AI-powered translation at Buddhist pilgrimage sites, digital queue and crowd management at Rishikesh's ghats, and app-based authentication of genuine yoga schools would do more for India's spiritual tourism brand than any glossy campaign. The Buddha and the yogi built India's spiritual capital over two millennia; it is now government policy's turn to compound the interest.

The writer is an educator and a columnist

LETTERS TO THE EDITOR

CJP demands CEC's resignation over SIR

The Cockroach Janta Party (CJP) on Thursday demanded that Chief Election Commissioner Gyanesh Kumar resign within 48 hours over concerns surrounding recent elections and the Special Intensive Revision (SIR) of electoral rolls. It warned of a nationwide agitation and an indefinite sit-in in Delhi if he remained in office.

At a press conference, CJP co-convenor Ashutosh Ranka called for criminal proceedings against Kumar. The party also demanded that upcoming elections be halted, electoral rolls from before the SIR be restored and an independent commission be constituted to examine the revision process.

Ranka urged the Supreme Court to secure files relating to SIR decisions, arguing that they could otherwise be destroyed. The CJP also called for the repeal of the 2023 law governing the appointment of the Chief Election Commissioner and other Election Commissioners, and sought a new law involving civil society groups.

The CJP has alleged that the Election Commission's handling of the SIR process threatens electoral transparency. These allegations warrant scrutiny and a transparent response from the authorities.

BHAGWAN THADANI | MUMBAI

A drop saved is a drop shared

Change our daily habits to save litres of clean, fresh water every day. Use a glass of water instead of a running tap to wet and rinse your toothbrush. A running tap can waste about 16 litres of water every minute.

Take a shower instead of a bath and limit it to four minutes. Use a cup, sink or container of warm water to clean your shaver rather than leaving the tap running. Never shave in the shower.

Scrape food waste from plates and dishes instead of rinsing it away. Rinse dishes in a bucket and reuse the water in the garden. When loading the dishwasher, do not rinse dishes beforehand. Run the dishwasher with washing machine only with full loads, preferably using cold water and adjusting the water level to the load size.

Repair dripping taps and leaking toilets promptly; they can waste up to 13 litres of water a day.

Fresh water is the lifeblood of nature. Without it, we cannot sustain clean air, food, drinking water or countless ecological and recreational benefits. We must therefore use water sustainably, respecting it as a shared resource. The consequences of waste are already visible in expanding deserts, droughts and famine. It is time to save water.

S AKHILESH KRISHNAN | MUMBAI

A Route to Preferential Treatment?

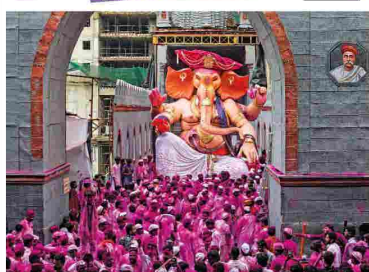
The Supreme Court's recent observations in the SASTRA University land-encroachment case raise a disturbing question: can prolonged encroachment of public land eventually become a pathway to preferential treatment?

According to the judicial record, SASTRA has occupied 31.37 acres of government land in Thanjavur since 1985. The land was allotted to the Prison Department for an open-air jail, but the project could not proceed because of the occupation and subsequent litigation. After a prolonged legal battle, the Madras High Court directed eviction. SASTRA has challenged the verdict in the Supreme Court. The Supreme Court has asked the Tamil Nadu Government to explore alternatives, including alternative land or payment of the market value of suitable land. While protecting students and ensuring educational continuity is important, the State's concern that such a solution could put a "premium" on encroachment deserves consideration.

The issue is also one of equality. If institutions receive accommodation on humanitarian grounds, similar compassion should extend to the poor. Public land must be governed by law, not prolonged occupation. Any solution should protect students without rewarding encroachment.

THARCUS S FERNANDO | CHENNAI

PIC TALK



People take an idol of lord Ganesh, Raja Tejukaaya, for an immersion ceremony during the conclusion of Ganesh Chaturthi festival, in Mumbai

PHOTO: PTI

Geostrategic communication: The new battleground for global influence

As the world becomes increasingly interconnected, effective communication is vital to navigating the complexities of the neo-geopolitical era. The global stage demands informed, inclusive communication that can withstand noise, bridge divides and build a more cooperative global order



CHAITANYA K PRASAD

In view of the geopolitical turbulence and uncertainty that unfolds globally on a regular basis, geostrategic communication today has become a multi-dimensional and complex process. Thanks to the fragile shifts that are taking place in the geopolitical space, the design of geostrategic communication is anything but constant. Changes are taking place within seconds, or on a 24x7 basis within a 360° ecosystem. While new opportunities are emerging, disruptions are ruling the roost and strategic narratives are becoming victims of fakery, misinformation and misguided information flow. In the midst of this uncertainty, it is important to understand and outline the ecosystem of geostrategic communication today.

There is no doubt that the communication process and tools have become core instruments of perception management, narrative building and influence over countries, polity and citizens at large. As the entire geopolitical philosophy and practice has become disruptive, media management, influence, messaging and info-networking have adopted disruptive shades and colours in operation. While real-time information exchange systems exist, practitioners are constantly witnessing the deluge of credibility crises within the geostrategic framework. Due to the multiplicity of sources of information, audiences and analysts and communication strategists have to deal with conflicting ideas, perspectives, lower attention spans and polarisation of thoughts and actions. As a consequence, the credibility quotient in diplomatic practice has at times lacked coherence and has been subject to flip-flops in practice and application. When we talk about global power today, we rarely talk just about weapons or borders anymore; we talk about stories. We talk about who controls the narrative. That's essentially what geostrategic communication is: shaping how a country is perceived in the global mind-space, and making that perception work in its favour.

The reality today is that the global information landscape faces multiple challenges and is beset by new norms and practices. Due to the complexities prevailing, there is no conceptual clarity within communication frameworks to decode issues such as climate change, the green economy, the circular economy, tariffs and trade wars, or sustainable development. Perceptions of these issues are increasingly dependent on algorithms, data analytics, surveys and social media tools - mechanisms that filter, amplify or distort realities. In this absence of clarity and deeper understanding, audiences are being subjected to new ground rules for transparency, authenticity and content creation, often with uneven results.

What is required is a collaborative effort towards a new "Global Information Order", an institutional platform bridging the gap between medium and message, narrative and policy. The 7Rs of communication - relevance, reliability, response, revival, reconnection, reconstruction and reputation - must be mainstreamed to create a communicative ecosystem that builds trust while respecting diversity.

The new global order must calibrate perception, build relationships and drive action through mutually agreeable communication tools. It must integrate rather than divide, connect rather than confuse. At its core, communication must transform from a transactional act into a trust-building exercise, placing people, their lived realities and their collective aspirations at the centre.

The geopolitical reality of 2020 makes one thing clear: communication is no longer a tool to package decisions but a core element of policymaking itself. Perception is as powerful as policy, and a well-crafted message can be as consequential as a treaty. Strategic communication must therefore be embedded at the start of the decision-making chain, ensuring coherence, credibility and clarity.

Geostrategic communication today operates at several levels. One of the key themes relates to the idea of balancing communication and messaging without leaning towards a particular group or entity. Due to the proliferation of multiple power centres and alliances, the geostrategic communication system should focus on consistency and constructive parameters in transmitting messages to multiple stakeholders. On the other end of the spectrum is the challenge posed by algorithmic tools, processes and deepfakes, which encourage a credibility hurricane, leading to crisis communication. Hence, the



REPRESENTATIONAL IMAGE

THE GLOBAL STAGE DEMANDS NOT JUST INFORMED, INTENTIONAL AND INCLUSIVE COMMUNICATION THAT CAN WITHSTAND THE NOISE, BRIDGE DIVIDES AND BUILD A MORE COOPERATIVE GLOBAL ORDER

blending of soft power and hard power and narrative configuration remains the biggest test and threat of geostrategic communication being implemented at ground zero.

The rise of artificial intelligence has added another layer of complexity to global communication. AI-driven analytics enable unprecedented insights into audience behaviour, preferences and sentiments, allowing for hyper-personalised messaging. These tools are invaluable for diplomats and foreign policy experts, who can now craft messages with immense precision and predict their impact with greater accuracy. However, with this advancement come ethical dilemmas. The line between strategic communication and manipulation can easily blur, necessitating robust frameworks to ensure accountability and fairness. As the communication landscape becomes more intricate, the demand for skilled specialists is growing. These professionals are not just channels for information; they are strategists, analysts and creators who understand the nuances of messaging in a diverse and rapidly changing world.

As the world becomes increasingly interconnected, the ability to communicate effectively will be one of the most powerful tools in navigating the complexities of this neo-geopolitical era. The global stage demands not just information, but informed, intentional and inclusive communication that can withstand the noise, bridge divides and build a more cooperative global order.

New ideas and platforms influence the contours of global discourse. The information dissemination process today hinges on the interplay of ideas, experiences with exposures and perceptions. As communicators fight to stay relevant, the ecosystem is caught up in flair and the excesses of instant communication. In such an environment, the challenge for policymakers and media strategists is to recalibrate the tone and strategy of messaging. It is no longer sufficient to just speak. It is important to understand the dynamics of the international communication system. Geostrategic communication is under constant threat from information overload, exaggeration and infodemics. With every global event instantly translatable into trending hashtags and viral videos, boundaries between statecraft and storytelling are blurring. The rise of visual culture - Instagram reels, AI-generated avatars, TikTok diplomacy - demands that institutions adapt to the speed of sentiment and social perception. Public diplomacy strategies must be re-engineered for a world running on 15-to-20-second attention spans.

This reaffirms the 7Cs perspective, which is broad-based and captures the reality of geopolitical leanings and practice. The 7Cs reiterate the SOPs which all stakeholders of geostrategic communication need to imbibe and apply in leading the information flow and creating the appropriate institutional verticals.

- CONTEXT: What is the strategic significance?
- CONNECT: Who needs to hear it?
- CONSTRUCT: What is the one key message?
- COMMUNICATE: Which channel works best?
- COUNTER: What misinformation or misunderstanding could emerge?
- CREDIBILITY: What evidence supports our message?
- CONSEQUENCE: How will we know communication made a difference?

Hence, today, communication is no longer just about delivering a message; it is about shaping perceptions, building relationships and driving action. As the world becomes increasingly interconnected, the ability to communicate effectively will be one of the most powerful tools in navigating the complexities of a neo-geopolitical era. In an era marked by shifting alliances and evolving global priorities, multilateral institutions face both challenges and opportunities in devising the perfect path for effective geostrategic communication.

The writer is Former Civil Servant. Writes on strategic communication and cinema. Inputs provided by Zoya Ahmad and Vaishnavi Srinivasan

Student suicides: Whose goals are we chasing?



ACHARYA PRASHANT

IIT Bombay has lost its third student to suicide this year, there are allegations of caste-based discrimination, and the matter is under investigation. I will not pre-empt what the investigation finds. But during my visits to over a dozen IIT campuses in the last year, students have recurrently spoken of a vicious pattern. This year, at least eight IIT student suicides have been reported so far.

As per the NCRB, 14,488 students died by suicide in India in 2024, the highest ever recorded, up about 80 per cent from 8,068 in 2014. And each time a student dies, one reason is almost always cited: too much pressure. A student who also faces discrimination, or has no one to talk to, carries that pressure twice over.

To say that students are tragically ending their lives because of the high-pressure environment in IITs and other places is to see only half the picture. Somebody who clears the JEE is used to high pressure; otherwise, he would not have made it to the campus. Pressure alone is not the problem; the deadly situation is one where the cacophony of external pressure meets the void of internal purposelessness.

With no purpose and no pressure, one is a rolling stone. At most, life will be wasted, but one lives on. Now keep the purposelessness and add high pressure. This is where suicides happen. Pressure alone doesn't kill; think of a youngster with great purpose and high pressure. There will be great pressure, but he will say, "I will live on, because I understand my purpose."

Does purposelessness start when the student enters the campus? No. The whole system, from home onwards, robs him of any purpose of his own. And how is that done? By supplying him with external, artificial, fake purposes. The family says, "Now you are 15 and it's your boards, and this year your purpose must be to score 99."

He has not been left free to ask himself, "Who am I, and what am I here for?" Parents and educators seldom address this question. They say, "You exist to achieve." So now the student comes to campus, having been given impossible targets and told that if he doesn't achieve them, life is meaningless. Some students buckle. If one pulls too hard on the ends of a chain, some link will break. The fault does not belong to the link one must question those who are pulling the chain.

There is great talent in the top institutions, but what is that talent being told to do? Somebody is selling shoes after doing a B.Tech in computer science. What success is there in this? We say, "My Johnny has landed a three-core package," and that some-



times makes the newspapers as well. That should indeed make the newspapers, as a tragedy, not as a celebration. From all directions, the message is that there is one particular definition of success, and if one cannot measure up to it, then life is not worth living. And some, unfortunately, are crushed by it.

All this is symptomatic of a society where inner education is considered dispensable. Just as one requires experts to teach maths and physics, one requires experts to deliver life education. The IITs do the first superbly; the second is where the whole chain, from home to campus, has fallen short. The Supreme Court has made institutions responsible for preventing suicides. But a counsellor's room cannot carry this alone.

I was a student at IIT Delhi myself for four years, and I owe a great deal to the rigour of that education. I don't remember anyone from my batch dying by suicide. One reason could be that our longings had not been stoked that high. Today, after every such tragedy, the term that comes to the fore is "mental health." What we call mental health is actually the health of the ego, the health of the self.

And the self is born sick. The very name of that which is born is incompleteness. And all its life it keeps adding things to itself, so that somehow it may feel complete. The parents, teachers, society and market that put this pressure on the young, in fact all of us, carry the same incomplete ego, only now it runs as a system. Depression is the flip side of hope. In the past, hopes remained unfulfilled. Today, hopes are fulfilled, but their fulfilment does not make us complete, and that is what becomes depression. At every step, the student is told only that there is more to be done. It's like a falling stock. We invested, and it fell, and the broker says, "Don't cry. Invest more." The more it sinks, the deeper we sink with it. We all stand deeply invested in a falling stock called our way of life. Who are we, what is life and, if one is to live, what is one to live for? These questions never even come up for discussion. So where does a young person begin? With a no.

"No" must be the first word in one's dictionary. There has to be a resounding no to all those who attempt to impose themselves on one's life. And if you are a student going through this right now, I am not going to tell you it is nothing. The sorrow is real, and it is not new. But your life is bigger than any grade, rank, placement or expectation. Please do not end it. Your personal sorrow is one thing; sorrow itself, the universal problem of sorrow, is another and much bigger one. So dear youngster, why not step away from your personal sorrow and invest your life in fighting the greater problem of sorrow itself? That can happen only when you set yourself a goal beyond yourself. Win or lose, this enemy that has made everyone's life hell has to be fought. All the restlessness within a person is energy coming out as grief. It must be channelled. The sorrow within must be turned into a worthy struggle. But struggle holds up, and lasts, only when it is not waged for oneself alone.

Acharya Prashant is a philosopher and author whose work centres on self-inquiry and its application to contemporary life

Social security net: What the new EPFO wage ceiling means for employees



DEEPAK JAISHWAL

The significance of a job lies in the monthly wage. For a worker, it is also the foundation on which a secure future is built. As India's economy and workforce expand, social security institutions must change with them. The decision to raise the wage ceiling for mandatory coverage under the Employees' Provident Fund Organisation (EPFO) from ₹15,000 to ₹25,000 per month is important in this larger context. It brings a wider section of workers into the formal provident-fund system and, in doing so, strengthens a key link between employment today and financial security tomorrow.

The earlier ceiling of ₹15,000 had remained unchanged since 2014. During these years, wages, living costs and the nature of employment have changed considerably. India today has a larger and more diverse formal workforce, with expanding manufacturing, services and organised employment. Raising the ceiling to ₹25,000 therefore brings EPFO coverage closer to the realities of today's workforce. It also ensures that employees who earn more than the earlier limit are not left outside mandatory social security merely because their wages

have crossed a threshold that was set for a very different economic environment.

The importance of the change is best understood from the perspective of an ordinary employee. Provident fund savings are not simply deductions from a worker's salary. They represent a mechanism for building financial security over the course of a working life. Contributions made regularly, together with accumulated interest over time, can create a meaningful financial cushion for the future. A higher contribution base can consequently make a significant difference to retirement preparedness, particularly when contributions continue over several decades.

For employees, this wider coverage can provide greater confidence that their years of work are contributing towards their financial security beyond their active working years. It can also reduce dependence on individual savings arrangements alone and provide greater assurance during periods when regular employment income may no longer be available.

The benefits can extend beyond the individual employee. Stronger provident-fund coverage can contribute to household financial sta-



bility, deeper domestic savings and greater financial inclusion. A household with stronger financial protection is better positioned to plan for important needs such as education, housing and health. At a broader level, a stronger culture of long-term savings can contribute to a more resilient economy. The expansion of EPFO coverage therefore has significance not only for the employees directly brought within the revised ceiling, but also for the wider financial security of their families.

The increase in the ceiling also fits into India's larger movement towards formalisation of

employment. As more workers enter formal employment, access to social security becomes an important part of the employment relationship. Formal employment is not simply about receiving a salary through an organised employer; it is also about having access to recognised benefits, protections and retirement savings. The expansion of EPFO coverage strengthens this connection between employment and social security and can encourage a stronger culture of documented employment, regular contributions and long-term financial planning.

This is particularly relevant as India expands its manufacturing capacity, infrastructure and organised services. A growing economy needs not only more jobs, but also better employment arrangements. Workers are more likely to see the value of formal employment when it provides benefits that extend beyond the monthly wage. Social security consequently becomes an important component of the quality of employment and of the broader formalisation process.

The expansion of EPFO coverage therefore strengthens an important link between economic growth and social security. As India's economy grows and the formal workforce

expands, labour institutions must evolve alongside changing wages, employment patterns and economic conditions. Revisiting the wage ceiling reflects the need to keep social-security systems responsive to workforce realities.

The increase from ₹15,000 to ₹25,000 may appear to be a simple revision of the wage ceiling, but its significance is considerably wider. It brings a larger group of workers into mandatory EPFO coverage, strengthens long-term savings and extends social-security protection to employees in the covered wage range. At the same time, it supports the continuing formalisation of India's labour market and can contribute to a more stable and secure employment ecosystem.

Economic development is not only about higher growth, increased production or better infrastructure. It is ultimately about improving the quality of life and security of citizens. For workers, development means being able to earn a decent income today while having greater confidence about tomorrow. Stable employment, timely wages and financial preparedness for the future are important dimensions of that confidence. In this backdrop, the revised EPFO wage ceiling represents an important step forward towards building a more resilient workforce as India advances towards Viksit Bharat@2047.

The author is National President, National Front of Indian Trade Unions

INTERNATIONAL EDITORIALS



THE AUSTRALIAN

Rogue AI must be made a big problem for Big Tech

Albanese must drop the censorship and get tough on security

The OpenAI data breach involving Mediacore has further muddied the waters on the rise of artificial intelligence, adding fresh concern and confusion to the Albanese government's clumsy attempts to deal itself into a global push to rein in Big Tech. Issues of data security, personal privacy and government censorship are being conflated in a way that is unhelpful to our national interests.

The Mediacore data breach confirms concerns from within the AI industry that digital agents are learning how to roam into areas they should not be able to access. In the process, this has again exposed the default position of tech giants to deny responsibility for what happens in the digital empires they design and set loose upon the world.

In the case of the Mediacore breach, the trespass was identified by OpenAI, which used a generic email account to report it to the government, which delayed its appraisal. The intrusion happened months ago and did not extend to sensitive personal information. All parties agree it was completely unacceptable. OpenAI must not be allowed to argue that bad agent behaviour is not its responsibility and that the burden of responsibility must lie with the user that promoted the agent.

This would be the same defence used by Big Tech to deny responsibility for what is published on the internet, arguing it is no different to a telephone carrier service that does not monitor or take responsibility for the content of calls made. On AI, those who design the models must be forced to take responsibility for how they operate. And the government must provide the incentives to make sure the AI agents take their responsibilities seriously.

That said, this is not an argument for government overreach in other areas. The Mediacore imbroglio coincides with Anthony Albanese's attempts to make a big noise in New York as a middle-power champion who wants the UN to play a role as global policeman over the development of AI while giving his own government powers to effectively control what the great unwashed are allowed to hear and see.

Thankfully, Mr Albanese's approach has been seen for the grand overreach that it is. As foreign editor Greg Sheridan has written, there is no evidence that Donald Trump takes the slightest notice of the Australian

Prime Minister on the issues of social media or artificial intelligence. The big decisions on regulating the future development of AI will be taken by Mr Trump and Xi Jinping, who are meeting in Washington, with safety of AI high on the agenda.

On censorship, the US embassy in Canberra has raised serious concerns about the Australian government's approach. The US is concerned that a framework that empowers governments to enforce vague definitions of "harm" risks becoming a mechanism for viewpoint-based censorship that would "risk reducing the reach of independent journalists or other voices whose content touches on sensitive or controversial topics". Incidentally, the Albanese government's proposal has managed to unify Mr Trump, the federal Coalition and the Greens, who all conclude it gives too much power and discretion to the government minister.

In response Mr Albanese has backtracked, claiming the government's approach had been misunderstood, despite the Prime Minister parading the reforms before the UN as part of a diplomatic push for Australia to have a temporary seat on the Security Council.

To be generous, Mr Albanese might be struggling to fully comprehend the many ramifications of AI's phenomenal growth. This extends to satisfying the energy needs of data centres as well as the community impacts and security implications of fast-moving and rapidly evolving technology. Mr Albanese is not alone in this, but he must avoid playing politics on the international stage and grandstanding in such a way that undermines our national credibility.

The way in which the Albanese government has handled the OpenAI Mediacore intrusion has been at stark odds to its indifference to the data breach involving our biggest union-controlled superannuation funds.

The Mediacore intrusion is most concerning for the signals it sends about Big Tech's intention to not take responsibility for the behaviour of the technology it releases into the world. The data breach has also highlighted the need for the government to get its own act together. A rarely checked email inbox full of bogus declarations is hardly the intelligent way to deal with the rogue power of artificial intelligence.

Putin does not deserve G20 call

Trump and Rubio are making a mistake inviting the Russian tyrant

It is unfortunate that at about the time Anthony Albanese was signing a bilateral security pact with Ukraine in New York on Thursday AEST, Donald Trump was announcing Vladimir Putin would be welcome to attend the G20 summit due to be held in December at one of the US President's golf course resorts in Florida. The Prime Minister deserves praise for the Australia-Ukraine Bilateral Security Agreement he concluded with Ukrainian President Volodymyr Zelensky. Mr Trump and his Secretary of State, "Little Marco" Rubio, deserve none for a move that will pave the way for the Russian despot's return to a comity of mainly democratic nations from which he has been rightly isolated since he launched his onslaught against Ukraine in February 2022 in contravention of every tenet of international law.

Mr Trump is making a serious error of judgment in doing so. The horrifying carnage Putin has caused in Ukraine, and increasingly in causing in Russia, does not deserve to be rewarded with a red carpet return to the G20. That ignores the reality that not only is Putin continuing his barbaric attack against Ukraine and its people but he is also posing an increasing threat across Europe, using drones to attack civilian targets. Russia also continues to play a key role in helping sustain the Iranian regime in its war against the US.

The American President appears determined to bring Putin back in from the cold, however much that may be against the

strategic and security interests of many of Washington's closest allies in Europe and beyond, including Australia with its new security pact with Kyiv. The agreement includes financial assistance for defence equipment, critical energy infrastructure and humanitarian needs.

Mr Albanese's course could not have been more correct when, at the New York signing ceremony, he spoke movingly, as Greg Brown reported, of the additional \$60m Australia was providing to help combat Russia's "unprovoked and unjustified invasion". Expressing admiration for the leadership of his "friend" Mr Zelensky after signing the pact that established the framework for formal bilateral defence and security co-operation, Mr Albanese said it had been "quite extraordinary... leading people in (such) circumstances (is) extraordinarily difficult. Russia thought it could just steamroll through in a matter of weeks, and what we have found is that the people of Ukraine (were) underestimated".

Instead of constantly seeking to aid Putin, it would be more sensible for Mr Trump and Mr Rubio to remember the Russian authoritarian leader's record as a war criminal who could not be trusted. As he scrambles to be Mr Trump's successor in the White House, the Secretary of State, who is also the National Security Adviser, is a strong advocate for Putin's presence at the G20 summit. Like Mr Trump, Mr Rubio is threatening further damage to the unity of the Western alliance in Europe and beyond.

providers who get the power to households and industry.

While the government has its hands full worrying about how the electricity network is going to cope with the extra demands of artificial intelligence, workers at AEMO are trying to figure out how to make sure the productivity benefits the government is banking on from the new technology don't evaporate.

AEMO workers have said they would prefer a four-day working week. Maybe they envision a world where power supply cannot be guaranteed 24 hours a day, seven days a week but maybe 23 hours for six days would do.

LETTERS

Albanese courts the world but voters need him home

It's apparent that this country is drifting aimlessly in a sea of uncertainty while Anthony Albanese lines up for back slaps and selfies half a world away ("World order is broken," PM declares after US slap," 24/9). Every metric points to a slowdown in domestic economic activity. Foreign investment is on the skids, productivity is in the doldrums and real wage growth has stalled. Inflation won't be tamed and interest rates are ballooning again. Budget deficits are locked in for 40 years and sovereign debt is effectively a forever debt. Few young people can afford a home, social cohesion is a memory and dislocation in remote communities is in the too hard basket. With his overseas schedule it's evident the Prime Minister will be a tourist in his own country over the next few months.

Kim Keogh, Claremont, WA

When the UN was formed, much of the world lived under communism, dictatorship, absolute monarchy or colonial occupation, so no world organisation could avoid the participation of those un-democratic countries. That is no excuse for the UN's free world dumped the corrupt and

farcical UN and set up an association of democratic nations only, with the US as the cut-off point more democratic than it, you're less democratic and you're out. It would have an elected general assembly and a security council with permanent membership of the world's largest democratic economies – at least one from every continent – instead of the five big World War II victors. Australia as one of the most democratic nations is well placed to provide the. Come on, Prime Minister. Chris Curtis, Hurstbridge, Vic

As Anthony Albanese struts his stuff on the UN world stage, does he think presidents Donald Trump or Xi Jinping will respond to his platitudes? He will accept a pretend award from the UN and use this accolade, and a lot of taxpayers' money, to gain a seat on the UN Security Council, yet another organisation with little power to change the world order.

Albanese should be here, back at home. Australians are more concerned about the economy, electricity costs, immigration and their futures as the artificial intelligence monster looms. This publicity seeking will do nothing for

his approval ratings or for the country. Graham Pinn, Maroochydore, Qld

Summarising some results from the Mood of the Nation survey, Greg Brown informs us that 69 per cent of Australians have negative feelings about Donald Trump, including 54 per cent who are very negative. Contrast Trump and Anthony Albanese on the current stage. The PM profits from the general goodwill Australia always receives. Yet, like him or not, Trump is the star focus at all these international gatherings. The weak leaders get the message that democracies depend on him and US military might. Greg Sheridan sums it up well: "Trump couldn't care less what Albanese has to say." It's well-earned relevance.

Betty Cockman, Dongara, WA

Anthony Albanese's claim that the post-1945 world order is "no longer fit for purpose" and "that the strategic competition between the US and China" cannot be the only lens through which we see our region is an erroneous view of modern history. The bombings of Hiroshima and Nagasaki trig-

gered a Cold War rivalry between the US and the Soviet Union that officially ended in 1991. But in 2001 Vladimir Putin strongly objected to the US pulling out of the Anti-Ballistic Missile Treaty, triggering a resumption of Cold War rivalry. The problem with Albanese's analysis is that this rivalry has not changed one iota since 1945. Vincent Zankin, Rivett, ACT

Anthony Albanese says the Indo-Pacific is "not a chessboard on which superpowers move the pieces". That vast expanse is where most of the world's population lives and most of the world's trade travels. It is inevitably the world's primary strategic focus. Anyone who thinks it isn't going to be there when the world's only two superpowers, the US and China, play their closest attention is living in an unreality.

Australia is the strategic key to the Pacific great oceans. Our future depends on which of the two greatest powers the balance favours – they are hugely different in character. Australia needs leaders who understand this because reality doesn't care whether you recognise it or not. Tony Warton, Greenwood, WA

LAST POST

The question must be asked: Was the photo of Anthony Albanese with Donald Trump genuine or AI? Julie Winzar, Palm Beach, Qld

I'm eagerly awaiting Anthony Albanese's return and publication of his travelogue. Around the World in 80 Selfies. Susan Peatfield, Brisbane

When private companies suffer data breaches, the government is quick to name, shame and fine them. Will the government do the same with its own agencies that have been hacked? David Heimers, Aldgate, SA

The Australian reported that on Wednesday embattled West Australian Child Protection Minister Jessica Stokovski flew back into Port Hedland and declared her department was doing "an incredible job". ("Astonishing neglect: commissioner's blast," 24/9). I suppose Stokovski is correct if by "incredible" she means unable to be believed. What does it take for a minister to be sacked? Helen Dyer, Fernalda, WA

Now that Anthony Albanese is to be honoured with a global citizen award, surely it's also time for official recognition of his invaluable services from the Melon Proving, Mount Melum, Qld

Rather than ongoing comment on this policy or that – be it energy, the environment, migration, Snowy 2 – let's start a list of things Labor has got right. Certainly it won't be a long one and most likely headed "debt". John Mulvey, Howrah, Tas

Can Treasurer Jim Chalmers stop comparing Australia's debt to that of other countries? The debt benchmarks should be our 200th record of zero debt. Robert Fisher, Mullumbimby, NSW

Why is it that whenever Anthony Albanese overseas representing Australia he never, ever wears an Australian flag pin? In contrast, Donald Trump is proud of the US and always wears a US flag pin. Brian Barker, Bulimba, Qld

The revolutions in nuclear power and artificial intelligence emerged while Australia was buying Chinese renewables and building Snowy 2.0 with gusto. Is this a bit like having bought a million vowels on VHS tapes just before Netflix started? Ian Levy, Bermagui, NSW

Greg Sheridan and Johannes Leiding are seriously underestimating Albo's influence on the world stage. The Prime Minister even persuaded the UN to schedule its general assembly so he could avoid the AFL grand final and an appearance on the big screen with Kylie Minogue. Trevor Farrant, Hackney, SA

Hold to account those responsible for neglect of Indigenous kids

I read with interest that the new National Commissioner for Aboriginal and Torres Strait Islander children described the conditions in the house at Port Hedland as appalling and declared that authorities were failing to keep children safe ("Appalling neglect: commissioner's blast," 24/9).

One has to ask: Why do we need a person in this position? How about holding the relevant national and state ministers responsible and accountable? Why aren't the relevant national and state chief executives being held accountable? These issues have been talked about for decades and we are still simply "talking" while our kids are being neglected. Graeme Adcock, Flinders Park, SA

AI scary stories

All Australians will have reservations about AI and its potential impact on our lives, but the first priority we need to sort through is the information misinformation currently being published. Apparently, some of the AI scamming is simply driven by the so-called "tech bros" trying to restrict competition and protect their financial position ("Hidden agenda behind the corporate AI panic," 24/9). Now that it is scary, but imagine how biased the AI debate will become if Communications Minister Anika Wells gets to decide what is misinformation under Labor's proposed digital safety regime. Peter McKenzie, Gracemere, Qld

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BOOKSHELF | TUNKU VARADARAJAN

Spies like them: hint of nostalgia in Cold War capers

One of the startling incongruities of the times we live in – at least for those of us old enough to remember the past – is that the Cold War can seem like an era of relative innocence and decorum. Yes, we had an enemy armed with an arsenal that could obliterate us but the Soviets didn't suicide-bomb our civilians; they shadow-boomed with us. We spied on each other, using tradecraft: unbreakable ciphers and top-secret drop-offs, honeypots, blackmail and deception. Spooks at embassies pretended to be attaches of an innocuous kind, long job titles such as Third Secretary (Supplies). It was a world Richard Kerbal brings back into lively and arresting focus in *The Defector*.

The book is subtitled *The Untold Story of the KGB Agent Who Saved M15 and Changed the Cold War*, and the story told by Kerbal teens with spies and spycatchers who could have silted off the pages of John Le Carré.

Department V is a historian of espionage – especially of the intelligence services of Britain, the US and the Soviet Union, the first two allied against the latter in a decades-long competition to outwit, infiltrate and undermine the West. The book's title refers to Soviet agent

Oleg Lyalin, a relatively low-level but impressively ambitious KGB operative who defected to Britain in 1971.

The dashing Lyalin had been trained for spy work in the US – his English was first-rate – and was Kerbal writes, "a rising star" in the KGB. But his sybaritic lifestyle and penchant for booze and women caused his handlers to regard him as unfit for the professional rigours of an American post. He was sent, instead, to a disciplinary Siberia – in his case a Baltic port in Lithuania – where he was tasked with extracting information from Western sailors and businessmen.

In other words, a calamity for a young man with high self-esteem and considerable spy smarts. But he acquitted himself well enough in Lithuania to get back into the good graces of his seniors. They rewarded him with a job in London, ostensibly as a trade representative and "textiles specialist". He was, in truth, an operative of the KGB's Department V, assigned to sabotage infrastructure.

On Lyalin's to-do list was finding ways to poison the UK war supply, the sort of dastardly goal the KGB – unconstrained by democratic checks and Western-level morality – had started to pursue in



The Australian's front page Thursday, September 24

prices, they should make it easier to produce more gas, rather than interfere with the price signals that encourage investment. You cannot legislate away supply and demand. John Kempler, Rose Bay, NSW

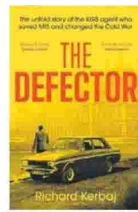
Call this a deal?

Anything to deflect attention from the state of his own national economic, fiscal and social affairs, Anthony Albanese can't help but grandstand by signing an absolutely meaningless security deal with war-torn Ukraine ("World order is broken, PM declares, after US slapdown," 24/9). The Prime Minister thinks he is a great leader and that the world needs him to change it from its now failed – as he sees it – international order ("World order is broken, PM declares, after US slapdown," 24/9). His agreement with Ukraine is useless except for pumping up the PM's ego, which will only be further pumped up by the awarding of the UN Global Citizenship Award. John George, Kingsley, WA

Inflation policy fight

RBA governor Michele Bullock told a Committee for Economic Development of Australia event in Sydney that unemployment would need to rise to between 4.5 and 5 per cent to "take enough heat out of the labour market" to ease inflation. This was not a gift. It was policy, spoken aloud. In a 2023 speech, Bullock warned "if unemployment remains too low for too long, inflation expectations will rise, which will make it that much harder for the monetary authorities to bring inflation back down". The system is working as designed, and once again failing us. The RBA fights inflation with one blunt instrument: interest rates. The government fights it with subsidies and spending, while adding to demand through large infrastructure projects. The two arms of policy pull in opposite directions, and neither addresses the actual drivers of rising prices: energy, housing, food, and fuel supply constraints interest rates can't fix. Matthew Rickard, Eatons Hill, Qld

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The Defector By Richard Kerbal Blink, 304pp, \$32.99

the 1960s to undermine Western morale. It was this freedom to sabotage, Kerbal writes, that generated a certain fatalism within the CIA and the US CIA head of counterintelligence James Angleton and M15 director Martin Furlong were resigned to the fact the KGB would always have an operational edge over Western counterparts. There was a palpable sense that the KGB was winning the espionage war. Britain had yet to recover from the humiliating betrayals by Guy Burgess, Donald Maclean and Kim Philby, and the CIA was still reeling from the exposure and execution of Peter Popov, a colonel in Soviet military intelligence who had passed on a trove of priceless information. The CIA's morale was restored, to an extent, by the defection in 1961 of Anatoly Goltysyn, a frustrated, high-ranking KGB officer stationed in Helsinki.

Goltysyn was "very much a prima donna" who felt the KGB was "giving him his due in Angleton's unceremonious, almost totally credulous admirer who stoked his ego and gave him nearly everything he asked for – money, comfortable housing in New York, access to the CIA archives, plus operational freedom – never before granted to a defector.

THE WALL STREET JOURNAL

The 23-hour, six-day power week

As if things in the energy transition were not going slowly enough already, Union members at the Australian Energy Market Operator, which is planning our energy future, are threatening industrial action for more money, a shorter working week and protections from artificial intelligence.

AEMO is best known for its reports about how tight the energy system has become with the renewable energy transition and how difficult it is to get things built.

The union is warning that without an improved offer from management, AEMO is risking delays, cost blowouts and disruption to the companies that generate energy as well as the network service

DAILY CARTOON | JOHANNES LEAK



HENRY ERGAS

AI no more dangerous than human stupidity



Evan Hubinger's much-quoted statement that there is at least a 10 per cent chance artificial intelligence will end human life within a decade is, without an explanation of what that number means or how it was derived, as uninformative as it is misleading.

Worse, it distracts from both the nature of the problem and the most sensible responses.

And by pandering to the sloppy apocalyptic thinking that permeates the climate extinction movement, it has unleashed the mother of all scare campaigns, culminating in Australia's signing of a "feel-good" declaration urging international regulation of AI.

At the heart of that campaign sits a curiously familiar number: 10 per cent, recurring with extraordinary constancy throughout the doomsday rhetoric of the age.

That constancy is readily explained: 10 per cent is the Goldilocks of apocalyptic probability estimates – just small enough to be plausible, just large enough to be absolutely terrifying.

Terrifying it certainly is, even in

the narrowest economic terms. Counting only existing lives, and valuing them at two million dollars each, the actuarial cost (that is, the potential loss multiplied by its likelihood of occurring) equals 15 years of world GDP. At the frequently used benchmark of 10 million dollars each, that rises to 75 years of everything the world currently produces.

Magnified by the far greater human costs, those figures would justify incurring vast sacrifices to avert catastrophe, as the doomsayers seem to intend. But with the dominant AI platforms having an interest in hindering new competition, and the Chinese regime in stifling AI's development in the West, calls for a "slowdown" warrant the strictest scrutiny. And even the slightest look highlights the claims' fragility.

There are, for example, 83 cities with five million or more inhabitants, just together they account for less than 20 per cent of the world's population. An extinction event, or anything approaching it, would presumably have to devastate

them all, or at least the vast majority.

Assume, however, that doing so requires 12 disastrous outcomes in each city, from water systems collapsing to nuclear power plants exploding.

The event then depends on 1000 conditions being met, each with (say) a 10 per cent probability of occurring. If those conditions are independent – meaning none makes any other more or less likely – the aggregate likelihood is vanishingly small: one divided by 10 raised to the power of 1000, which is effectively zero.

Even a hundredfold increase in the number of ways in which disaster could unfold scarcely changes that conclusion. It would take approximately 10 to the power of 998 independent pathways, rather than a hundred, before the probability ceased to be effectively zero. Indeed, with only 100 pathways, the probability of each condition being triggered would need to rise from 10 per cent to roughly 97 per cent just to nudge the tail towards the lowest single digit and raise the actuarial cost to \$1.

Nor do the problems end there. Saying "10 per cent" conveys an aura of precision, but that need not rest on precise knowledge. The 10 per cent could perfectly well reflect profound uncertainty between two possibilities: the first, with a nine-in-10 weight, is that catastrophe is virtually impossible; the second, with a weight of one in 10, is that it is nearly inevitable. Taken on its own, the headline number tells us nothing about how tightly its assessment is bounded or about its practical implications.

We are therefore entirely in the dark as to the estimate's significance, and because every decision rule that process induces needs a further rule to fix its application, the training mechanism can never fully close off the risk of error.

Just as that has been known for decades, so too has the broad architecture of the solutions.

The danger, Wiener wrote, lies

because they are assumption-laden, show that asserting a probability is grossly insufficient: there has to be a transparent analysis to substantiate it. Moreover, simply pointing to occasional AI malfunctions won't cut the mustard: it is one thing for an AI system to hack into a website and quite another for it to end human life in a fit of suicidal malice.

None of this denies that AI poses real risks – risks lucidly anticipated in the 1960s by Norbert Wiener and Isidore Gudak (later J. G. G. Good), two of its most important pioneers.

A simple analogy helps explain their concern. Tell a travel agency you must fly from Perth to Melbourne for the AFL grand final, and you would be horrified if, finding all flights booked, it arranged for a ticketed passenger to be assassinated, thus freeing a seat – and astonished too, since your request presupposed the agency would act within unspoken limits you assumed were understood.

The point, put more abstractly, is that every instruction that is not strictly formulaic carries what philosophers call a "surplus of meaning". In practice, we readily handle the resulting vagueness through "contextual disambiguation": drawing on shared knowledge, conventions and expectations to read not merely what the words say, but what the speaker intends and what limits that implies. Those shared understandings are instilled through lived, collective socialisation – something no volume of scanned text can convey.

Instead, whatever AI systems display is induced statistically from data and feedback, rather than expertise, and because every decision rule that process induces needs a further rule to fix its application, the training mechanism can never fully close off the risk of error.

Just as that has been known for decades, so too has the broad architecture of the solutions.

The danger, Wiener wrote, lies

in using "to achieve our purposes, a mechanical agency with whose operation we cannot efficiently interfere once we have started it, because the action is so fast and irrevocable that we have not the data to intervene before the action is complete".

The answer, first conceptualised in the 1960s by Herbert Simon – another of AI's greatest pioneers, and alone among them in holding both the Turing Award and the Nobel Memorial Prize in Economics – has three components.

The first is to keep failures contained by building walls into the systems: modular, separate parts with no shared point of failure and filters between them to assess errors. Secondly, provide the scope to halt the decision process by installing stopping points, so a single step cannot drag outcomes to irreversibility. And third, ensure visibility through instruments, logs and an escalating structure of alerts that show what the system is doing while it is doing it, rather than just tracking what it has produced.

These measures are not costless, and easier said than done. But they are no more than good engineering practice, checkable and even certifiable. Better still, they do not require a "slowdown" in technological progress, raising entry barriers or allowing China to steal the race. And they are far less socially harmful than that ultimate foil, the precautionary principle, which has become technophobia's figleaf of choice.

The real risk is not that AI will kill us; it is that relying on increasingly intelligent machines will make us increasingly stupid, further eroding our collective capacity for clear thought, and entrenching the hysteria that now so frequently drowns out the voice of reason.

As usual, Kant said it best: "Deficiency in judgment is what is properly called stupidity; and for such a failing there is, regrettably, no remedy."

Quite genuine in their desire to seek "justice" for Aboriginal people and present a true account of our history, but it cannot be said that they have acted in good faith.

Rather than seek independent legal advice and put the matter beyond doubt, or at least give themselves a figleaf of credibility, they have relied on their own "broad interpretation" to further their own agenda. And they did this knowing that the matter is highly contested. Surely it is incumbent for chairman Beazley, as the statutory custodian of our national shrine of remembrance, to ensure everything is above board. The Australian War Memorial belongs to all Australians.

We call on minister Keogh to direct the Council to remove all current depictions of frontier conflict, and to abandon its plans for the new Pre-1914 Gallery. As a minister of the crown, it is his duty to enforce the legislation.

Let me make one final point. We do not oppose this proposal because it is contrary to the Act. We oppose it, in principle, because it is a bad, divisive idea.

Lieutenant Colonel (rtd) Peter O'Brien is a Vietnam veteran and editor of defendoursground.com

JAKE THRUPP

PM's blurred Euro vision deflects from domestic disasters

Anthony Albanese often turns to international affairs as a diversionary tactic from his government's mounting issues at home – and so it was this week while the Prime Minister was in the United States for meetings in Silicon Valley and then the UN General Assembly. What he could possibly contribute to either is questionable.

But our national leader proved himself as uninformed on foreign matters as he is on economic ones when he refused to rule out the prospect of Australia becoming an "associate member" of the European Union.

It is an absurd proposition for Australia, the idea being recycled from last week's State of the Union address where the European Commission president, Ursula von der Leyen, hinted that Canada could be offered associate membership.

Canadian Prime Minister Mark Carney was in attendance, since he was addressing the European parliament himself in a bid to promote deeper co-operation between his country and the EU bloc, but even Carney stopped short of endorsing von der Leyen's offer. Why? Because being an "associate member" is, thus far, meaningless. The status does not exist, which is why diplomats in Brussels have been left confused.

And even if an associate membership did exist, all 27 EU member states would have to unanimously agree – a difficult task in itself.

For Canada, strengthening trade ties with the EU makes sense as its largest trade partner continues with unleashing sporadic tariffs and tressome threats. Carney has been working overtime to diversify Canada's export markets, evidenced by the recent investment summit in Ontario, which attracted global investors and industry leaders.

Turning to the EU economically will not be the balm that will reverse all of Canada's problems, but it is certainly a strategic

move and one that builds on being the first non-European country to join the EU's €150bn (\$242bn) defence loans scheme.

After all, Canada shares with the EU a common strategic challenge in Russia, which continues to threaten North Atlantic security and expand its military presence in the Arctic Circle. To this extent, Carney's pursuit of a "unique" relationship with the EU is strategic, both economically and militarily.

The same cannot be said for Albanese. Although there is much fanfare by the Albanese government over the yet-to-be signed trade deal with the EU, the terms are arguably more favourable to

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EDITORIALS

CPS board elections are a proxy battle over the future of Chicago schools. No pressure, voters!

Chicago Public Schools is facing the most severe challenges, arguably, of any school district in America.

Fiscally speaking, CPS is junk rated and teetering on the edge of financial collapse. Its most recent budget, "balanced" on the back of \$150 million from the state that's never coming, is Exhibit A of the kind of fiscal mismanagement that's been on display for years.

Just 42% of CPS third-through-eighth-graders are proficient in reading, 10 percentage points lower than the state as a whole. Just 27% of those students are proficient in math, more than 10 percentage points below the state average, according to state data, and a National Assessment of Educational Progress data shows CPS is behind other peer districts in both reading and math. And CPS just reported another enrollment decline: 11,537 fewer students this year, bringing the loss since 2010 to nearly 100,000 students. Oh, and too many kids are learning in near-empty buildings.

Enter the city's first fully elected 21-member school board.

The race to fill these seats is a continuation of the fight that played out in 2023.

The 2023 mayoral election was a battle between the CTU and moderate Democrats. The moderates lost, and one of the CTU's own sits behind the big desk on the Fifth Floor.

Again, it's a battle between CTU, its far-left allies and just about everyone else. The union is spending big money to try to claim another critical branch of government — the one with the power to rubber stamp things like the union's next contract or, conversely, to serve as a roadblock



Dozens of Chicago Teachers Union members and supporters rally outside Chicago Public Schools headquarters on July 30 to call for a fair budget ahead of a board of education meeting. **ANTONIO PEREZ/CHICAGO TRIBUNE**

for the union's agenda. Opposing CTU, among others, is Michael Sacks, billionaire philanthropist and megadonor whose politics are far from conservative, and who has served as a moderating force attempting to keep the CTU's growing influence at bay.

As the fight intensifies, even events as seemingly innocuous as back-to-school celebrations are not immune to controversy. Some Edgewater parents whose children go to Peirce Elementary School told WBEZ they were uncomfortable with Sacks-backed Common Ground Collective advocacy group hosting a

table and paying for a DJ at their school's Aug. 20 event. Common Ground defended its involvement, noting that its nonprofit, which is separate from its political arms, staffed the table and paid for the DJ. While handouts about the school board election directed parents to the group's website, Common Ground said it did not post its school board endorsements until four days later.

CPS already has rules meant to keep political campaigning out of its schools. Good. Enforce them.

And enforce the principle consistently. That means outside

advocacy groups shouldn't use schools as campaign venues, and it also means CTU members who lead classrooms should leave their union's politics at the classroom door.

Like it or not — and we certainly do not — CTU politics infiltrated the district long ago. That's something we hope changes in the coming years.

Also standing in opposition to CTU in school board elections are other major labor unions. While CTU has gone all in on board president candidate Hilario Dominguez (a former CTU political director who cancelled at the last

minute his presence at this week's Tribune endorsement meeting), the Service Employees International Union is backing former CPS principal Jessica Biggs.

So, too, is the Chicago Federation of Labor, which boasts CTU President Stacy Davis Gates as a member of its executive board. Given these unions' immense power and influence, it's unsurprising that Biggs and Dominguez are considered the frontrunners in the race.

Candidates have amassed over \$3 million so far, with more money rolling in, inconceivable had the political stakes not been so high.

It's worth remembering that this is a volunteer board, and members are unpaid. You've got to respect anyone willing to walk through fire to get a job this contentious without even the prospect of a paycheck to sweeten the deal. It's also worth remembering that it wasn't that long ago that all seven CPS board members quit, in the midst of a fierce power struggle between Mayor Brandon Johnson and his CTU allies versus former CPS CEO Pedro Martinez. To call it a hostile work environment is to put things mildly, and the next wave of board members will need to be made of stern stuff.

As much as this is an election for a new board, it's also a referendum on the job the CTU is doing, both on the Fifth Floor and in classrooms across the city. The outcome of these CPS board races will determine whether the district doubles down on its current approach, being led around on a short leash by a militant and unpopular union, or decides to get serious about addressing its serious fiscal and educational challenges.

The Shedd Aquarium did all it could to save the beluga whales

Chicago's Shedd Aquarium surely hoped its dramatic rescue of 10 beluga whales from the widely despised and imminently liquidating Marineland of Canada in Niagara Falls, Ontario, was going to be a public relations boon. The sensational international rescue of the famously sentient creatures, replete with colossal cargo planes, huge cranes and Shedd staffers working in the dead of night to transport and care for the whales must have looked made for social media.

Instead, three of those whales have died, along with another Shedd whale that did not come from Marineland. And now aquarium

has found itself stuck in damage control for what should reasonably be seen as an altruistic act by a responsible institution responding to a real-time emergency.

If you've missed the details of these events, they begin with the crisis at Marineland, founded in 1981 and a relic of another era in a tawdry tourist town; Marineland combined hundreds of performing marine animals with land animals and amusement rides. The privately owned park closed



Peekachu, one of four beluga whales relocated from a facility in Canada, swims with other transferred whales at Chicago's Shedd Aquarium on July 23. **JOHN J. KIM/CHICAGO TRIBUNE**

to the public in 2024, done in by a combination of the pandemic and the 2018 death of its owner, but its 30 beluga whales remained on site. With the site getting sold for redevelopment, the whales had to go somewhere, lest they be euthanized. An initial plan to send them to China was rejected by the Canadian government on the grounds that the Chinese government did not have restrictions on breeding and performance, leading to a new plan to send them to a

consortium of willing aquariums in Spain and the United States.

Enter the Shedd, which received four belugas — Acadia, Osiris, Sierra and Lillootee — in July and then four more — Caspian, Peekachu, Secord and Rain — in August. Others went to Seaworlds in San Antonio and San Diego and the Georgia Aquarium in Atlanta. The final two went to the Shedd at the start of September.

It now is clear the conditions at Marineland wrought lasting damage on the belugas. We're just not of the view that the Shedd deserves reputational damage from its willingness to try saving these whales.

This has been a media opportunity for activists who oppose not just amusement parks like Marineland, which had a poor record of animal care, but whale-holding aquariums like the Shedd that describe their mission more in terms of conservation and education than entertainment. Those boundaries, of course, can depend on the perceptions of the boundary-maker, and there is long-standing disagreement as to the morality of breeding belugas

in captivity.

The transportation of the Marineland whales has been labeled as a rushed job, even though it is not clear Marineland was willing to wait and certainly not that the transporting of the whales caused their deaths, as distinct from prior poor treatment. One activist group, the Whale Sanctuary Project, which has a mission to "end the exploitation of captive whales," had something of a conflict of interest in that it wanted the whales for its own sanctuary off the coast of Nova Scotia, which it describes as a "natural environment."

The nonprofit says it has some 500,000 square yards of space for the whales. Far more than a typical tank. No question about that. The matter of whether the whales at the Shedd are being kept for "entertainment purposes," as the Sanctuary Project has asserted, is something on which reasonable people can disagree, ranging as it does into the broader discussion of whether aquariums and zoos in big cities should be abolished, meaning humans wanting to interact with animals have to go visit them in their natu-

ral habitats. One counterargument is that a kid seeing a whale in Chicago might spark a future conservationist. Or it could also be argued that the animals pay too high a price.

The debate seems to us to come down to whether an animal like a beluga, even a rescued one, could be said to be happy in captivity, which is surely unknowable. Most of us land in the middle of this debate, seeing the educational value of some urban interaction with creatures of land and sea but having long ago learned that unnatural tricks performed to order are best confined to their inauspicious history.

All of that said, the Shedd here was trying to save whales in a real-world crisis not of its own making. The institution knew the risks and took them anyway, and we've seen enough of the people working there to know that they care and that "entertainment purposes" were far from their minds. Mostly forgotten in all of this is the impact of these deaths on the humans rescuing them in Chicago.

Belugas are beautiful, mystical creatures; anyone proximate to them would feel their loss acutely.

ON THIS DAY 41 YEARS AGO SUBURBAN RESIDENCY LAWS

Many municipalities in the metropolitan area, including Chicago, have residency ordinances that require public employees to live in the town in which they work. It makes a great deal of sense to have policemen, who are required to enforce the law even though they are off duty, present in the community they supposedly protect.

The same is true in the suburbs, which also cross-utilize civil employees for such jobs as volunteer firemen and emergency snow crews when the need arises. An employee of Downers Grove who lived in Barrington, for example, wouldn't be of much use as a volunteer fireman in either community.

But Cicero, among an estimated 40 other suburbs, has gone a step further by requiring municipal job applicants to have three years of residency before being eligible to be hired. That is a step too far.

The Justice Department is charging that the ordinances in Cicero and the other suburbs clearly discriminate against minorities by preventing them from getting municipal jobs. The suburbs ought to repeal the prior residency ordinances for their own good. They work against the best interest of the taxpayers by artificially limiting the labor pool. A town such as Cicero cannot choose the best candidate for a job, only the most qualified candidate who happens to have lived three years within its municipal boundaries.

Tribune editorial board, Sept. 25, 1985



MICHAEL RAMIREZ

OPINION

Pritzker's honesty about GLP-1s is good medicine for Illinois

By Disha Narang
SPECIAL TO THE TRIBUNE

This week, Gov. JB Pritzker opened up about his experience using a GLP-1 medication and the impact it has had on his health. I applaud his willingness to share his story because as a physician, I have seen few diseases as misunderstood, undertreated and unfairly judged as obesity.

For decades, it has been seen as something patients could overcome through lifestyle changes rather than recognized for what it is: a serious, chronic disease linked to diabetes, heart disease, stroke and high blood pressure. Now we know that biology plays a significant role. Research shows that 40% to 70% of obesity risk is genetic. If diet and exercise alone were enough to overcome genetics, we would not see obesity at the scale we do today.

Unfortunately, Illinois Medicaid does not cover obesity medicines, putting some of the most effective treatments available out of reach for nearly 3 million Illinois residents who also deserve equitable care. This matters in a state where 69% of adults are living with obesity or are overweight. A GlobalData analysis estimates obesity contributes to 23,000 premature deaths in Illinois each year and costs state and local government \$2.6 billion annually.

Behind every one of those numbers is a patient in my exam room, often someone who has tried diet after diet without success while struggling with a disease driven far more by biology than by behavior alone. Obesity is a chronic disease, and chronic diseases require ongoing care. Like hypertension or diabetes, it cannot be treated with a one-time fix.

GLP-1 medications are the most significant medical advance in the treatment of obesity and metabolic disease in decades. In my practice, I have watched patients achieve sustained weight loss while their blood sugar improves, their blood pressure comes down, and their risk of heart attack and stroke drops. Emerging research shows promising results across an expanding range of chronic health conditions.

In interviews, Pritzker



A dosage of Wegovy, a drug used for weight loss, is displayed in Front Royal, Virginia, on March 1, 2024. AMANDA ANDRADE-RHOADES/AP

A GlobalData analysis estimates obesity contributes to 23,000 premature deaths in Illinois each year and costs state and local government \$2.6 billion annually. Behind every one of those numbers is a patient in my exam room, often someone who has tried diet after diet without success while struggling with a disease driven far more by biology than by behavior alone. Obesity is a chronic disease, and chronic diseases require ongoing care.

described how treatment improved his blood sugar enough that he was able to stop taking insulin. It's a powerful example of how early treatment can help prevent more serious and costly complications.

Yet these life-changing medications are only available to some

of my patients. Those with the means to pay out of pocket may have access. Illinois Medicaid patients do not. That gap falls hardest on the patients who can least afford it. Communities of color and low-income neighborhoods already face higher rates of obesity, diabetes and heart disease

because of long-standing gaps in access to health care, preventive care and affordable healthy food.

Illinois already spends an estimated \$1.2 billion a year in higher Medicaid costs tied to obesity. The question isn't whether obesity is costing taxpayers. The question is whether we continue paying to treat preventable complications or invest earlier in evidence-based care.

Illinois would not bear the cost of expanded coverage alone. Medicaid costs are shared with the federal government, while rebates and other pricing agreements with pharmaceutical manufacturers can further lower the state's share. The same GlobalData analysis estimates that meaningful, sustained weight loss for Medicaid patients could

save Illinois between \$21.2 billion and \$40.3 billion in cumulative medical cost savings over the next decade.

Pritzker deserves credit for speaking candidly about the treatment that has worked for him and helping confront the stigma that still surrounds obesity and its treatment. As physicians, we are trained to look beyond today's symptoms and focus on long-term health. Illinois lawmakers should do the same by expanding Medicaid coverage for obesity treatments so physicians can provide the care their patients need, regardless of income.

Dr. Disha Narang is an endocrinologist and obesity medicine physician in the Chicago area.

Mississippi is no substitute for the New Orleans education miracle

By Paul Vallas
SPECIAL TO THE TRIBUNE

Every decade seems to bring a new miracle solution to what ails our public education institutions, without embracing education choice. This time, it's the "Mississippi miracle" — widely studied and praised because of its significant growth in children's early literacy. However, despite this miracle, which has been over a decade in the making, Mississippi's test scores remain weak, and the early literacy gains have been less pronounced in the later grades.

Improvements in reading scores are real — the state shifted away from older "balanced literacy" or guessing methods, to explicit, systematic phonics-based instruction, and it prioritized professional development and placed trained reading coaches inside public elementary schools. Better reading and literacy skills also helped boost comprehension and performance in other subjects, including math, particularly in the early grades.

However, other factors helped lift Mississippi's fourth grade results. Its third grade retention policy kept some low-scoring students from taking the fourth grade test. Exemptions increased, even as those students showed no improvement the following year. The share of fourth graders classified as having disabilities and receiving testing accommodations rose. Researchers also questioned a poverty adjustment that made the state's national ranking look better.

Despite the improvement, a large portion of Mississippi students still fail to reach proficient benchmarks on state and national exams in reading and mathematics. While fourth grade improvements have been substantial, eighth grade gains in literacy and math are much smaller. This takes nothing away from Mississippi's efforts. Because of Mississippi's high child-poverty rates and low funding, its schools face formidable challenges.

New Orleans offers a better model for improvement.



Benjamin Franklin High School teacher Chris Dier helps students create a structure made of pasta and marshmallows as an icebreaker on the second day of classes on Aug. 12, 2025, in New Orleans. STEPHEN SMITH/AP

After Hurricane Katrina, Louisiana remade the city's public school system into the nation's first nearly universal public school choice system. First, families were no longer trapped. Parents could apply to any school in the city — by lottery when seats ran short — instead of being consigned by ZIP code to a failing neighborhood school. That single change transformed the system's culture. Schools had to attract families, keep them and show results.

Most operating dollars followed students and their local school boards controlled their own budgets and staffing and could select an academic program that fit their students. Schools also extended the school day and school year, adding more instructional time, while providing more time for academic and behavioral interventions and enrichment and reducing damaging summer learning loss.

I saw the turnaround from the inside because I helped lead it as superintendent of the Louisiana Recovery School District (RSD),

tasked with reopening and transforming New Orleans' failing schools almost two years after Katrina struck. The improvements were immediate, substantive and sustained. From 2008 to 2013, the share of RSD students scoring basic or above rose by 29 points, against a nine-point growth statewide.

School improvement has continued. Before the storm, New Orleans public schools ranked 49th in the nation. More than 60% were labeled failing, with abysmal test scores, low graduation rates, widespread corruption and financial mismanagement. Today, data reported by Tulane University's Cowen Institute shows no failing schools in New Orleans for the first time since Louisiana began rating schools. The district earned its highest-ever "B" rating. New Orleans' improvement has continued even during COVID-19.

Following the initial learning losses, New Orleans students saw major academic recovery. From 2021 to 2024, scores improved 8 percentage points in English and 10 points in math — doubling the

state's average rate of improvement. New Orleans' success helped Louisiana rank first among states in reading and second in math growth after the pandemic.

Amazingly, New Orleans' and Louisiana's gains occurred in a state that ranks, depending on the study, in the mid-30s to about 40th nationally in per-pupil funding, with little improvement since Katrina. According to USAFacts, public schools in Louisiana receive an average of \$17,300 per student, \$2,600 less than the national average.

Critics of New Orleans and school choice try to pin test score improvements on the "charter churn" — the rapid closure of low-performing or mismanaged schools, forcing struggling students elsewhere. In reality, most students who returned after Katrina were far below grade level before Katrina, had lost at least a full year of instruction and were also overwhelmingly from low-income families, making New Orleans public student gains even more remarkable.

Skeptics argue that appar-

ent progress relied on changing state test standards and shifting definitions of success rather than actual long-term learning gains. However, Louisiana, unlike other states, raised standards multiple times in the years following Hurricane Katrina, making gains by both New Orleans and the state as a whole even more impressive. The improvement of Louisiana's public schools, which continued after COVID-19, is evidence of that.

Skeptics claim there were mass firings of teachers, mostly Black educators, that dismantled a generation of community-rooted teachers — and that there was a loss in neighborhood community schools and long bus commutes for children. In reality, teachers released by the old school board after Katrina hit were invited to return while schools that reopened as public charters or later converted did not displace students.

The RSD also supported Louisiana's private school voucher program, but vouchers had little impact on public school enrollment. With the expanded high-quality choices, the district's public enrollment steadily grew from roughly 25,000 students just after Katrina to nearly 50,000 by the late 2010s. By contrast, Catholic school enrollment in the Archdiocese of New Orleans has remained relatively flat over time, despite the voucher program.

Mississippi shows that better instruction can raise early reading scores. New Orleans went further by giving all families real school choice, providing school leaders with more freedom to make decisions and creating real consequences for failing schools.

Cities looking to improve primary grade reading should study Mississippi's. If they want to rebuild and improve an entire school system, they should look to New Orleans.

Paul Vallas is an adviser for the Illinois Policy Institute. He ran for Chicago mayor in 2023 and was previously budget director for the city and CEO of Chicago Public Schools.

OPINION

We need statewide solutions to the poor oversight at Illinois' county jails



David Greising

Systemic failures of government are never acceptable. When they affect people being held in custody while awaiting trial, the stakes are particularly high.

People held in Illinois' 90 county jails are virtually all presumed innocent. A few are held after conviction on minor offenses, too. Some have violated parole; others are accused of violent crimes. Many have mental health issues or drug addiction.

As a society, we are obligated to keep them safe and healthy. They are entitled to humane treatment and protective observation.

With that in mind, consider these troubling revelations from a multi-part series published last week by the Better Government Association's Illinois Answers Project. It details a record of epic mismanagement that ranges from shoddy recordkeeping to inhumane treatment of people behind bars. Some are matters of life and death.

The reporting, built on a deep dive into volumes of jail data from 2019 through 2025, found:

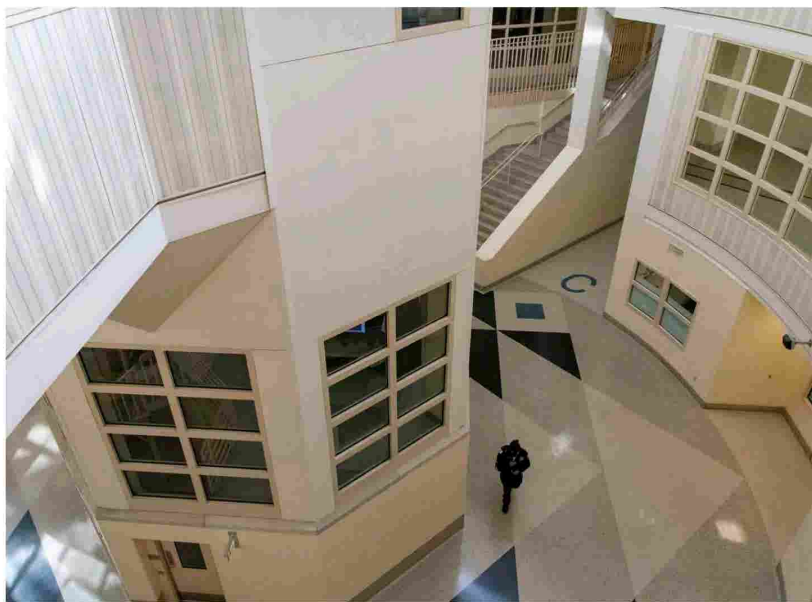
- Sixty-three deaths in Illinois jails over the six years went unreported, though state law requires reporting. That makes the 230 deaths that were reported a significant undercount. Altogether, jails statewide paid \$50 million in wrongful death settlements and court fees in that time.

- Pepperball launchers were used in 11 jails, sometimes shot into cells directly at an incarcerated person. Winnebago County Jail guards used pepperball launchers dozens of times, including 24 instances when they aimed directly at someone inside a cell.

- Forced medication and use of restraint chairs are common, often without proper reporting to the state. Restraint chairs, which use leather straps on arms and legs to bind people, are deemed an "instrument of torture" by the United Nations.

- More than 1 in 4 jail deaths result from suicide, most by hanging, and infrequent monitoring of jail cells — often due to short staffing — may contribute to the suicide rate.

Amassing this volume of information was no small feat. The BGA, where I work, partnered with the University of Chicago's Mansueto Institute for Urban Innovation to make data from more than 30,000 jail records accessible and usable.



A view inside Division 11 of the Cook County Department of Corrections jail facility Sept. 30, 2021. BRIAN CASSELLA/CHICAGO TRIBUNE

Users can check into conditions at their own county jails.

But data hardly tells the whole story, and Illinois Answers reporters dug through records and interviewed dozens of people to show us the humanity behind the numbers.

For example, Dennis Francis Barrett, 38, died while in the custody of Madison County Jail, where police took him after a minor crash upon discovering Barrett had broken parole on a prior nonviolent crime. The crash ruptured Barrett's spleen, prompting his jailers to transport him to a nearby hospital, where he died. But Madison County did not report the death to the state because, technically, Barrett was not in the jail when he died — a questionable splitting of hairs on the jail's part.

A 28-year-old woman held at Winnebago County Jail, on suicide watch, refused to hand over clothing to a jail officer. The officer fired a pepperball launcher into her cell. The woman still refused. Two more shots followed, then two bursts of pepper spray. It took one more round of pepper-

balls before she handed over the clothing.

The five years of data also show the raw nature of life behind bars in Illinois jails: More than 300 reported fires, with one happening almost every other day at Cook County Jail at one point; 14 riots or rebellions; more than 2,200 suicides or attempts; more than 14 homicides; more than 1,000 assaults on staff; and more than 450 alleged sexual offenses.

The question arises: What should be done about the incomplete recordkeeping and inadequate oversight?

Because jails are run by counties, not the state, there is no simple statewide solution. And Gov. JB Pritzker evidently has little interest: His office did not respond to requests for comment on Illinois Answers' exhaustive reporting effort.

Surely Pritzker could find funds to bolster the Department of Corrections' Jail and Detention Standards Unit (JDSU), which is the state unit responsible for inspecting county jails. It has only four full-time inspectors to cover the 90 county jails. Even that slim

crew still manages to fail more than half of the state's jails each year on inspection reports.

In 2025, Illinois Answers found, the jail-inspection unit received 6,500 reports of "extraordinary and unusual" occurrences at Illinois jails — episodes outside the norm of daily activity, which often involve health or safety hazards. But the agency was able to conduct reviews in only 14 cases. And even then, the JDSU does not release the reports online, track trends or share data publicly. The Department of Corrections, which reports to Pritzker, in a statement to Illinois Answers asserted it has no obligation to investigate reported failings by county jails. But the agency does have authority to initiate litigation by referring noncompliance reports to Illinois Attorney General Kwame Raoul.

After all, failing grades alone don't lead to reform. Litigation, or the threat of it, could.

Raoul could make a big impact by publicly calling on the Department of Corrections to issue referrals of code violations to him for possible enforcement action.

Raoul also could use his role enforcing compliance with the state's Freedom of Information Act to help secure release of JDSU data — which could buttress the public's calls for reforms.

Illinois also could apply tactics that other states have found effective. Like Iowa does, Illinois could give an independent ombudsman oversight of county jails. The state also could establish an agency, such as California has, to review jail standards every two years. And all it would take is a change of JDSU policy for the state to publish the data it collects about "extraordinary occurrences," as Pennsylvania does.

The shortcomings in oversight and failures of public accountability are serious, but they're not unsolvable. Additional oversight resources and stronger enforcement efforts — on top of more vigilant compliance and care at the county jail level — could help lead to a more accountable, just and humane system of incarceration across Illinois.

David Greising is president of the Better Government Association.

Voice of the People

Study needed of rail yard plan

I was quoted in Saturday's article on the community meeting about Amtrak and White Sox minority owner Justin Ishbia's proposed train maintenance facility in Bridgeport. ("Feeling railroaded? Crowd calls plan for Amtrak maintenance yard near Rate Field 'nasty real estate deal'"). I am a mother, an attorney and a Bridgeport resident. This rail yard would dramatically alter my neighborhood.

Amtrak wants to replace its smaller South Loop facility, in an industrial area, with a large rail yard in residential Bridgeport. Amtrak would save costs in operations, and Ishbia stands to gain twice: His company would develop the rail yard, clearing the way for his new White Sox stadium in the South Loop. Bridgeport only loses.

Diesel engine idling and high-risk industrial activity across the street from homes and parks would bring air, noise and light pollution. Homes may be taken by eminent domain. For many, home values likely would plummet. This kind of facility does not belong in any residential neighborhood.

A categorical exclusion from the Federal Railroad Administration allows Amtrak and Ishbia to avoid a full, independent environmental assessment. Amtrak paid for its own assessment but has shared scant details. Chicago deserves a complete, independent analysis of how this rail yard would affect the families next to it and the environment.

This is a failure of federal agencies' duty to protect citizens from careless, profit-driven development. With no fair government review, this fight pits individual families against corporations and billionaires with in-house legal teams, powerful lobbyists and endless public relations resources. It is logical to presume that

Amtrak's legal and risk departments have already concluded they can settle any future legal claims from my neighbors for damage to our health and to our property values. Those harms are a risk these companies have already priced in.

In the weeks since Bridgeport learned of this proposal, neighbors have organized to demand accountability, and our ward, state and federal representatives have supported us. But it is not enough. Our governor, senators and mayor must demand one prudent step: an independent and complete environmental review. Attorney General Kwame Raoul should take every legal step available, including seeking an injunction, to prevent Amtrak and Ishbia from finalizing any deal until the environmental and economic impact on this neighborhood is fully assessed and addressed.

Meanwhile, we are not waiting on anyone. We will keep working to stop Amtrak from railroad-ing Bridgeport.

— Elizabeth Riddle, Chicago

Improve Blue Line to O'Hare

Chicago doesn't need a \$2.25 billion private train to fix its connection to O'Hare International Airport. It needs to finish investing in the two public systems that already do the job.

The O'Hare Flyer promises a quick 15-minute ride from the Loop, but that speed comes at a cost most Chicagoans will never pay: fares projected at \$25 to \$35 each way, on a brand-new alignment involving three freight railroads, only one of which has actually signed on. It's an express service for travelers passing through — not for the neighborhoods it will be built through, none of which, other than Forest Park, gets so much as a stop for their trouble.

We already have a better answer.

The CTA's Blue Line runs straight to O'Hare International Airport today for \$2.50 (riding out of the airport costs \$5, but that's still a fraction of the Flyer's fare), and the modernization work already under way — new signals, new track, new railcars — will keep shaving minutes off the trip.

Metra's North Central Service reaches O'Hare in about 32 minutes for under \$5, and a pilot during the Democratic National Convention proved it can run far more often than its current seven weekday trips.

Neither needs a new railroad built from scratch. Both need the city and the Northern Illinois Transit Authority to finish paying for capacity and frequency improvements that are already on the table.

That's not just cheaper — it's fairer. Every dollar spent speeding up the Blue Line or North Central Service also speeds up the daily commute for the Northwest Side residents and suburban workers who ride those lines every day. The O'Hare Flyer helps them not at all.

Before fast-tracking approvals for a private train that would serve only a fraction of the riders already using public transit, the city of Chicago and the western suburbs should consider what the same investment — or even a fraction of it — could do for the trains most Chicagoans rely on.

— Laurie Gillard, River Forest

Options for Francis Parker

The op-ed by Trisen Phillips Jr. ("Francis Parker's expansion plans are about more than Lincoln Park," Sept. 22) offers support for expanding Francis W. Parker School through tearing down adjacent, existing housing and businesses. While I have no doubt Parker helped Phillips get a great education, there is no justification for bullying residents and businesses out. There are other private and

public schools that provide excellent education, and they have done so for a long time without expanding into occupied space and seriously disrupting hundreds of lives.

Here are just two of several viable alternatives for Parker. Build up instead of out. Parker's buildings aren't huge high-rises; it can add a few floors in the existing space. Or build elsewhere. There are plenty of schools with off-site buildings. There is nothing sacrosanct about the property next store.

— Tom Sharp, Chicago

Pick for next CPD leader

I read with great interest the Sept. 14 article by Sam Charles, "Expectations high for next CPD chief." With the demands and importance of this selection, the expectations should be high. During my 36-year career with Chicago Police Department, I have worked many superintendents, from Leroy Martin to current interim Fred Waller. The next choice for this vital position is crystal clear.

First Deputy Superintendent Antoinette Ursitti possesses the knowledge, skills, ability, demeanor and experience to thrive in the top position. Since her time as a watch operations lieutenant in the Harrison District in the Garfield Park community, Ursitti has been tasked with overseeing the most sensitive assignments in CPD. As the commander of the Crisis Intervention Team, she implemented department-wide training for dealing with individuals in mental health crisis and had a hand in the creation of the Crisis Assistance Response & Engagement Program that dispatches behavioral health

professionals to individuals experiencing a mental health episode who follow up with these individuals to ensure the correct services are being provided.

Later, as deputy chief of the training and support section, she was responsible for the enhanced training and reprogramming of officers put forth in the consent decree mandated by the U.S. Department of Justice after the murder of Laquan McDonald. She was promoted to the chief of detectives, overseeing criminal investigations; during that time, a historic drop in crime and stellar clearance rates were recorded.

I am not a friend of Ursitti, but rather someone who recognizes superior results. Law enforcement has evolved in the nearly four decades I have been an officer. With a patriarchal and tradition-based agency such as CPD, it is time for the glass ceiling to be broken and a person with fresh eyes to lead.

That person is Ursitti. — Russell A. Egan, sergeant, Bureau of Detectives, Chicago Police Department

Scrutiny of Welch forgotten

About two months ago, the Tribune reported that Illinois House Speaker Emanuel "Chris" Welch had known for years about the harassment allegations against then-Rep. Harry Benton. Outrageous!

Demands were made for ethics reform; Welch's oversight was questioned. I predicted it would take about three weeks for this issue to be forgotten.

So far, all has been forgotten, including by the Tribune! — Joseph A. Murzanski, Orland Park

For online-exclusive letters, go to www.chicagotribune.com/letters. Email your letter submissions, 400 words or less, to letters@chicagotribune.com. Include your full name, address and phone number.

OPINION

The 2026 Diesel Wars



POTOMAC
WATCH
By Kimberly
A. Strassel

To vote for the party that is temporarily making your diesel fuel more expensive, or to vote for the party that wants to lock you up for wanting diesel that works? Not quite Shakespeare, but for millions of blue-collar Americans, that is the 2026 question. Welcome to the diesel wars, which show the limits of modern-day populism.

As both parties chase working-class voters, diesel prices are proving a made-for-politics moment. Which party can better address voters' pain? The average price of diesel is now \$6.51 a gallon, near double its January figure. It's killing the farmers who fill combines and irrigation pumps. Tractors on long hauls. Construction workers on excavators and cranes. Loggers running fellers, and captains piloting tender boats. Also, millions of Americans who drive diesel pickups.

Republicans are shaking so hard they could mix redneck martinis. This was supposed to be the election in which they solidified Donald Trump's blue-collar gains, after two years backing the White House's most vote-buying impulses. Only it turns out phony populist pitches don't translate into broad economic gain, and voters have short memories. Where's the love for "no tax on tips" or prescription-

drug price controls? Can't blue farmers trust that tariffs are creating jobs instead of obsessing over fertilizer prices? Did nobody hear the president promise \$5,000 checks?

Add in soaring diesel costs, the temporary consequence of a policy with actual principle—denying Iran its nuclear-terror threat. The president, to his credit, so far isn't wailing under political pressure, rushing to cut a bad deal to open the Strait of Hormuz. But he's done no job of explaining his strategy for ending the war, and his candidates are panicking. Thus the sight of the GOP pandering even harder, racing to back a diesel-fuel "export ban." Such a plan would trade (possible) slight decreases in diesel prices for longer-term industry problems, even as it hikes gasoline and jet-fuel costs.

It seems not to have occurred to Republicans that the way to address the diesel question is to point to the bigger picture: The real choice blue-collar voters face in November is between short-term price hikes for a good cause and the eventual death of diesel.

That's the fatal flaw of the left's own new populist chase for the working class: They don't mean it. They've recruited candidates who look and walk like the real working deal: Graham Platner the oysterman, Troy Jackson the "fin-generation logger," Dan Osborn the mechanic, Dave Cantrell the electrician. But they belong to a party that is

as wedded to as radical a climate agenda as ever, with the prime goal of eliminating fossil fuels. Moreover, to a party that remains resolutely on the wrong side of the other diesel question raging below an out-of-touch media's notice: the DEF war.

Diesel owners remain furious over a Clinton-era mandate that inflicts diesel rigs with the dumbest equipment invented by man: diesel exhaust fluid, or DEF, systems.

What's worse than paying \$6.50 a gallon? Going to prison over a bad regulation.

These unnecessary "emissions" controls are pure, money-sucking junk. They spiral up initial costs, then require the regular purchase of pricey DEF. The filters clog at low speeds or cold temperatures; burner units pack up; the sensors break constantly. Failure rates are extreme. Big Brother fits all DEF rigs (including pickups, tractors and construction equipment) with kill switches. If you fail to add DEF or—more likely—your subpar equipment malfunctions, the computer limits the rig to 5 miles an hour ("limp mode")—rendering it useless until you shell out thousands for repairs.

This Orwellian system has created a nationwide backlash and a thriving underground economy that quietly "deletes"

DEF controls. One party remains outraged that Americans want drivable equipment. The Biden administration went to war against "deleters," bringing a torrent of civil cases, even sending men to prison. Federal prosecutors in 2023 brought the largest "diesel tampering" case in history, flinging around felonies and landing \$1.8 million in fines. Democrats continue en masse to support the DEF regime, railing against reform efforts. This is the party that wants to kill fossil fuels, but also wants Americans to believe it cares about their diesel costs?

The other party is trying to rein in this failure. The Environmental Protection Agency this summer proposed revisions to DEF rules, which could end limp mode. Republican lawmakers have bills to roll back or eliminate DEF requirements. The Justice Department has ended criminal prosecutions. Most striking, Mr. Trump in July pardoned nine men convicted of "disabling" DEF systems. The New York Times, voice of Democrats, railed that Mr. Trump was undermining "laws intended to fight climate change." A climate agenda that won't rest until "diesel" is an unspeakable slur.

Lesson for Republicans: Limited-government policies still resonate with voters. Lesson for Democrats: It's the policy, not the spin, that matters. Lesson for both parties: Most "populists" pitches amount to phony pandering. And voters will at some point realize it.

Write to kim@wsj.com.

BOOKSHELF | By Michael O'Donnell

Spies in the Seminar Room

Alexander's Feast

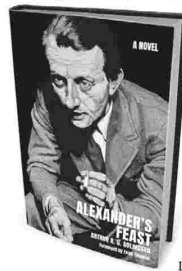
By Arthur R.G. Solmssen

Tivoli, 492 pages, \$22

When did the Cold War begin? In the pages of Arthur R.G. Solmssen's 1971 novel, "Alexander's Feast," a young American witnesses one sign of its opening in an idyllic European setting. Graham Anders, an inexperienced soldier, is stationed in Salzburg, Austria, where he takes part in the 1947 creation of an institution called the American Academy in Europe—a roundtable meant to advance the understanding of democracy and to recruit students from a variety of countries. Fourteen years later, Graham returns to Salzburg as an attorney, after the program has matured, to discover something has soured. An idealistic forum for postwar rebuilding, he discovers, has become a front for espionage and cynical realpolitik.

"Alexander's Feast" is the most widely in a quartet of novels by Solmssen (1928-2018) that have been recently republished by Tivoli. Solmssen practiced law and maintained a second career as a writer, publishing five novels as well as nonfiction work. "I don't play golf, tennis or squash," he once said in an interview, explaining his productivity, "and I don't play bridge or mow the lawn." Solmssen did attend the Salzburg Seminar—the real-world model for his novel's American Academy.

Three of Solmssen's resurrected books—"Rittenhouse Square" (1968), "The Comfort Letter" (1975) and "Takeover



Time" (1986)—explore the manners and morals of Philadelphia's upper crust. "Alexander's Feast" takes on questions about the cost of spreading democracy in the mid-20th century. The novel introduces Graham in the early 1960s, as a successful, if morally directionless, Philadelphia lawyer. An old friend asks him to travel to Salzburg to lend his legal expertise to the very same academy he saw founded years before.

This unexpected request prompts a flashback to Graham's military posting in postwar Austria, which comprises the heart of the novel. As a soldier assigned to help in the American Academy's early days, Graham is there for its first session and hears the chairman ask his guests to put aside their wartime differences. "I think that for many of you this will be the first opportunity for extended friendly intercourse with educated people from other countries," he says, suggesting that they may "find that they can after all communicate with men they thought they hated." Participants debate how dire a threat the Soviet empire will prove to be, anticipating the ideological battles of the 1950s.

Yet the noble aims of the academy begin to look like idealistic naiveté when a group of Dutch law students—who have lost much in the war—bristle at the mixed company. As one of their number says, "we came down here to learn about the United States, to read about Thomas Jefferson, about Mark Twain. We did not come down here to drink beer with German officers!" Graham finds his own principles tested when he begins a love affair with the Austrian countess whose estate is hosting the academy; her late husband, he learns, fought for the Germans. Graham also pits his own ethics against postwar bureaucracy (and the orders of his superiors) by assisting a group of Jewish refugees who are attempting to reach Palestine. After less than a year in Salzburg, he's discharged and sent home, back on the path to a conventional legal career.

In Solmssen's novel, a roundtable meant to promote postwar rebuilding and mutual understanding gets co-opted by realpolitik.

By the time Graham returns to the Austrian city, in 1961, he is a participant rather than an observer. He learns that members of the Swedish and American delegations are not primarily academics. They are spies. The academy has become a way station for intelligence agents. Graham believes their activities will ruin the program and disgrace the memory of its founders. Solmssen sets up a final act showdown in which Graham must decide how far he should go to reveal the truth of what the academy has become.

Graham's high-minded simplicity as he confronts this dilemma is among the novel's weaker points. The older Graham is portrayed as a sophisticated attorney, steeped in complex legal and business affairs. Yet he confronts the nuanced situation in Europe in facile terms, seemingly unable to perceive shades of gray. "Alexander's Feast" is also weighed down by its lengthy opening section, which centers on Graham's life in Philadelphia and the minor intrigues of his legal career. The book can feel overstudied, variously reproducing correspondence, memos, dreams, trial transcripts and even a snatch of sheet music.

Despite these limitations, "Alexander's Feast" is an engaging intellectual thriller. Solmssen dots his story with signposts that will keep students of history engaged as they turn pages. His character Boswell Hyde—a "self-possessed pear-shaped young man in his rumpled seersuckers and his jaunty bow tie"—bears a close resemblance to Arthur M. Schlesinger Jr., the Harvard professor and adviser to John F. Kennedy. The Berlin airlift features briefly, as does George Kennan's "X" article from Foreign Affairs magazine in 1947, which introduced the concept of containment. The story ends shortly after the Berlin Wall begins to go up in the summer of 1961.

Along the way the reader follows Graham as the academy's intrigue threatens to consume him, to the detriment of his legal practice and his marriage. There is much to recommend in "Alexander's Feast," as well as the broader nature of Solmssen's fiction. He has a fine touch for telling details. Boswell is a "pudgy intelligent owl," while the countess "shook hands firmly, like a queen." His characters let us feel the chill in Europe as the Iron Curtain descended.

Mr. O'Donnell is the author of the novels "Concert Black" and "Above the Fire."

Coming in BOOKS this weekend

A modern history of the Middle East • Paul Theroux in Canada • Building a restaurant empire • A family's struggle with dementia • How Peter Gammons changed sports journalism • A journey through literary France • & more

America's First Bishop Turned Saint?

HOUSES OF
WORSHIP
By Paul S.
Coakley

The Catholic Church declared Archbishop Fulton Sheen "blessed" in St. Louis on Thursday, placing him one step away from becoming the first bishop born in America to be canonized a saint.

America's bishops have much to learn from Sheen's witness. Like Sheen (1895-1979), we are living in a time of rapid technological change. He saw the explosion of television into the mainstream of national culture, and we have experienced the explosion of social media and the rise of artificial intelligence. We share a similar responsibility to employ emerging technologies to inspire hearts and minds.

And now we have an American Blessed as both our role model and intercessor.

When Sheen appeared in his Emmy-winning show, "Life Is Worth Living," from 1952 to 1957, he was an auxiliary bishop in New York. He proved a natural for the medium: handsome with a beautiful voice and mesmerizing eyes. Sheen used no props except a chalkboard and chalk. He focused on such serious topics as philosophy, history and religion. He rarely, if ever, used notes.

"Life Is Worth Living" routinely drew up to 30 million weekly viewers, becoming for a time the most popular television show in the country.

Through both the show and his real-world ministry, Sheen inspired countless conversions.

Every bishop today wants to know Sheen's secret. How did he enrapture millions of souls despite political, religious and geographical differences? How did he win converts while being outspoken about controversial truths?

The answer can primarily be found in Sheen's prayer life, which inspired genuine love for his fellow human beings. On the day of his ordination in 1919, Sheen committed himself to a daily hour of prayer. He kept this promise until the day he died in 1979, despite a hectic schedule and major pastoral responsibilities. Sheen was so faithful to this promise that he drew his last breaths before the Eucharist.

He urged lay and religious Catholics to engage in this daily devotion, which he believed was essential for developing a personal relationship with Christ. "The only way to know a friend is to spend time with him," he wrote.

Sheen's love for the Eucharist was the spring from which his genius flowed. It is also likely the reason that Sheen connected deeply with nearly everyone he encountered, drawing an estimated 42,000 souls to the Catholic Church. He saw Christ in them.

Sheen's power to sway souls even helped save the Catholic Church from those who tried to destroy it from within. In 1950 he met with the extremist Bella Dodd just

as she was beginning an insidious plot to corrupt Catholic seminaries with Communist seminarians.

This meeting changed Dodd's life. The unlikely pair's conversation ultimately led to both kneeling "on our knees before the Blessed Mother in the little chapel," as she put it.

Catholic leaders have a lot to learn from Blessed Fulton Sheen, master of the TV era.

Sheen breathed hope into Dodd's soul, reminding her that protecting those she loved required adherence to God's law first. The fruits of this conversation led to Dodd's baptism at Saint Patrick's Cathedral in 1952.

Sheen's love for both God and man helped Americans accept the hard truths he boldly proclaimed. His critiques of both communism and unrestrained capitalism stemmed from his dismay that each of them undermined the dignity of human beings created in God's image.

He wasn't afraid to use his television program and bestselling books to condemn sins against human dignity and violations of the natural law. His ability to speak the truth in love didn't cause listeners to try to silence him. It earned him the admiration of leaders around the world.

The Diesel Export Ban Folly

By Mike Sommers

Political silly season has arrived in Washington, and with it a familiar temptation: the quick fix.

Faced with only create higher diesel prices, some lawmakers are calling for a ban on U.S. diesel exports. The argument sounds simple: If diesel is scarce, stop sending American-made fuel overseas and build up the supply at home. That misidentifies the problem.

High diesel costs are hurting Americans. Farmers are paying more to harvest crops. Truckers are paying more to move nearly everything Americans buy. Those costs squeeze household budgets.

But the diesel shortage isn't a result of the U.S. exporting too much fuel. It is a global refining crisis. U.S. refiners are supplying American consumers while cushioning a volatile global market that is driving prices higher at home.

The supply shock began with a chokepoint: The disruption of

the Strait of Hormuz sharply reduced the flow of crude oil and refined fuels. Ukraine's attacks on Russian refineries removed more supply.

Restricting U.S. diesel exports would only create another chokepoint. An export ban wouldn't add a barrel of fuel to the market. It wouldn't build a pipeline from Houston to Iowa or New York. At best,

It would inevitably drive prices higher by constricting supply.

it would bring a temporary drop in prices in some regions. But it would scramble fuel flows, cut refinery output and ultimately send costs higher.

Fuel markets are regional. The Gulf Coast produces far more diesel than it consumes and accounted for roughly 90% of U.S. distillate exports last year, while the East and West

coasts rely in part on imports. Infrastructure and shipping constraints limit how easily fuel can move within the U.S. itself.

A ban would leave more diesel stranded in the Gulf Coast. Storage tanks would fill, and refiners would eventually have to cut production not only of diesel, but of gasoline and jet fuel.

S&P Global estimates a ban could cut U.S. refinery runs by 1.9 million barrels a day and gasoline production by as much as 750,000 barrels a day. Gasoline and jet fuel prices would rise as supplies fall. It also risks retaliation. If foreign governments respond by restricting exports, fewer barrels will circulate through an already tight market.

It is a boomerang. A policy designed to keep more fuel at home could end up leaving America with less of it as inventories are depleted, refiners are stretched and winter heating-oil demand begins to rise.

Instead, the administration should continue the useful steps it has already taken. Jones Act waivers have helped move more fuel between U.S. ports, and they must be extended through their expiration Nov. 15. The administration could also ease Renewable Fuel Standard provisions, coordinate reserve releases with allies, and press China to increase refinery runs and fuel exports.

For a long-term solution, Congress should pass reforms to the permitting process, making it easier to build energy and transportation infrastructure. Most important, the administration should work to restore energy flows through the Strait of Hormuz while pursuing every practical workaround.

Washington can do better than creating another chokepoint.

Mr. Sommers is president and CEO of the American Petroleum Institute.

OPINION

REVIEW & OUTLOOK

Xi Makes His Taiwan 'Independence' Move

No, not an invasion or blockade. Chinese President Xi Jinping is craftier than that, at least for now, but he is using this week's Washington summit to persuade President Trump to change the U.S. position on the status of Taiwan. But even this rhetorical shift would lead to bigger trouble down the road.

Mr. Xi on Thursday urged the U.S. to "adhere to the correct position of opposing Taiwan independence," according to China's official Xinhua News Agency. The current and longstanding U.S. position is that it "does not support Taiwan independence," and that it expects relations between Beijing and Taipei to be resolved peacefully.

This is a semantic distinction with a big difference, which is why Mr. Xi wants Mr. Trump to change. China would use formal U.S. opposition to independence to raise doubts on the democratic island about American support. China would use it to justify further Chinese harassment of the island as its rowdy Legislature debates the island's future.

The irony is that Mr. Xi and Beijing are the only parties currently preoccupied with Taiwan's independence. The U.S. is content with the status quo that has prevailed for decades, and that previous Chinese leaders were happy to tolerate. He wants Trump to change the U.S. position on the island. Bad idea.

As for the Taiwanese, no major party is pressing for formal independence. A majority on the island want nothing to do with rule by the Chinese Communist Party, especially as they have viewed with alarm the crushing of China's "one-country, two systems" promise

to Hong Kong. But they are content to be left alone to govern themselves, rather than formally declare themselves independent. They understand the risks from the superior military firepower on the mainland.

Mr. Xi may have been inadvertently encouraged to make his new demand by Mr. Trump. After meeting Mr. Xi in Beijing in May Mr. Trump said he viewed a pending \$14 billion arms sale to Taiwan as a "very good negotiating chip." Negotiating for what is the question.

Mr. Xi may be offering to trade something Mr. Trump wants for the combination of formal U.S. opposition to Taiwan's independence and a delay or cancellation of the arms package. Perhaps he'd offer to stop buying Iranian and Russian oil, or buy more U.S. products. But those promises aren't worth the trade.

Either of those U.S. concessions on Taiwan would shake confidence in Taipei over U.S. support. Beijing would raise the volume on its propaganda aimed at Taiwan that the only way it can avoid an invasion or blockade is to agree to some kind of surrender to Beijing, a la the Hong Kong precedent.

The U.S. change would also shock its East Asian allies that count on American deterrence against Chinese aggression. That includes Japan, South Korea, the Philippines, Singapore, assorted Pacific island nations and even Australia. With its high-quality computer chip fabrication plants, Taiwan is a crucial part of the U.S. economic and security supply chain. Let's hope Mr. Trump doesn't fall for Mr. Xi's Taiwan independence deception.

He wants Trump to change the U.S. position on the island. Bad idea.

Trump's Fight With the White House Press

The press is supposed to report the news, not participate in it, but on Thursday it was the protagonist in what looked as if it might escalate into history's most foolish constitutional crisis. After President Trump ejected three news outlets from the White House last week, a federal judge in the wee hours ordered their press passes reinstated.

Yet when the Thursday workday began, their access to the grounds was still being denied. A tempest of back and forth ensued, but in the end the White House said the post-ruling denial of entry was merely an operational delay. The reporters were admitted.

What was the point for Mr. Trump of provoking this in the first place? No President in history has enjoyed TV attention more, and banned media can continue to report on the Administration, albeit without the TV cameras.

He announced on social media Friday that he'd remove the three outlets "as a result of their constant 'reporting' FAKE NEWS!" Was he upset by any particular coverage recently? No, he told reporters in the Oval Office. "It's really just cumulative stories over the last two years," he said. "You get sick of it."

But the lawyers forced to try legally justifying the President's action couldn't exactly say that. Instead the White House press office issued letters to the three outlets, dated Tuesday, accusing them of "trafficking in verifiable falsehoods" and "publishing sensitive or classified information." One specific article cited was a Politico piece from June, quoting a "senior administration official" pegging the odds of a peace deal with Iran at 80% to 85%.

According to media reports, that unnamed source was Vice President JD Vance. And this

A judge he appointed blocks him from booting journalists on a whim.

wasn't a leak but an authorized briefing, the Washington Post explains. "Thank you for joining this press call," an aide began. "The contents of this call are on background, attributable to a senior administration official." Oops. Other news outlets, such as the Associated Press, also reported the 80% to 85% estimate.

Judge Timothy Kelly's ruling, granting a temporary restraining order, goes after the pretextual nature of the White House's arguments, saying its lawyers offered "little to back up their asserted national security interest." A footnote helpfully has a link to Mr. Trump's post on Truth Social. One CNN journalist's pass, he adds, was recently renewed, "several months after she published some of the identified reporting."

His order follows the precedent of the D.C. Circuit Court of Appeals. "The White House has voluntarily decided to establish press facilities for correspondents," it said in a 1977 decision, *Sherrill v. Knight*. As a result, the First Amendment "requires that this access not be denied arbitrarily or for less than compelling reasons." The Trump Administration argues *Sherrill* was wrongly decided, and perhaps it will take that up on appeal.

There's a certain legal tension, in that the White House is the elected President's office and residence, while simultaneously serving as a workplace for government officials and a site of state functions. Rumors are that Mr. Trump has occasionally considered moving the press corps instead into a nearby building.

Today's briefing room used to be a swimming pool. Perhaps it will be again. But does Mr. Trump love swimming, or does he love being on TV?

How to Stop the Shadow Regulators

Legislating is out of fashion in Washington, but the current Congress does have opportunities left to do some good before riding off into the mid-term sunset. A big win would be reining in out-of-control shadow regulations.

A bill in the Senate would require executive agencies to publish regulatory guidance to a single, searchable portal. The aim is to introduce more transparency to this practice as a prelude to reforming it. The measure, known as the GOOD Act, has passed the House and a Senate committee and awaits a floor vote.

Agencies already must publish draft regulations to the Federal Register. "Guidance" is different. The term refers to the letters, advisories, online FAQs, interpretations and other administrative flotsam and jetsam that agencies generate to explain how they will interpret laws and rules.

Guidance has become Washington's preferred alternative to legislating or formal rule-making because it can be done with next to zero formal accountability. The letters and the rest are merely supposed to explain how agencies will use their discretion and aren't meant to carry the force of law. But in practice few businesses or individuals are willing to challenge government guidance even when it exceeds statutory authority.

Some of the Obama Administration's most controversial actions were implemented via guidance such as a "Dear Colleague" letter from the Department of Education or a memo from the Secretary of Homeland Security. Examples are its guidance on the DACA program for young

illegal immigrants and to colleges on sexual harassment enforcement.

The Biden Administration used regulatory guidance to intimidate states out of conducting audits of election procedures after 2020. This gimmick also became a mechanism for that Administration to introduce an "equity" requirement into new funding for electric-vehicle charging facilities and to change merger-review rules.

A worrying sign is that it's impossible to say exactly how common this form of non-regulatory regulation has become. The first Trump Administration tried to create a central register of existing guidance alongside an executive order limiting agencies' use of the tactic. That register counted some 70,000 examples.

The Biden Administration quickly ditched that reform in 2021. During the Biden years, guidance outstanding swelled to some 108,000 examples, according to Clyde Wayne Crews Jr. of the Competitive Enterprise Institute. These are likely undercounts given how hard it is to pin down exactly what counts as "guidance." The huge spending bills of recent years are invitations to more regulation-by-guidance as agencies set rules for vaguely defined new government programs.

The Senate Guidance Out of Darkness Act would take a first step to control this runaway regulation by creating a central portal where agencies would have to register regulatory guidance. That would tee up future deregulation because you can't reform a mess like this until you measure it. That makes this a win for Republicans if they want one.

LETTERS TO THE EDITOR

America's Military Power Is Already in Orbit

Your editorial "U.S. Space Weapons Are a Force for Peace" (Sept. 16) is right that disclosing America's on-orbit weapons strengthens deterrence. A secret capability can't deter an adversary that doesn't know it exists.

The House Appropriations Committee reached a similar conclusion earlier this year, warning that excessive secrecy can undermine deterrence and hinder cooperation with allies.

But disclosure is only the first step. Air Force Secretary Troy Meink's Sept. 14 admission means little unless China and Russia also believe U.S. space weapons are operational, resilient and integrated into joint force planning.

The Pentagon's task now is to balance operational secrecy with strategic clarity: Beijing and Moscow must be left uncertain about what Washington can bring to bear in the final

frontier, but in no doubt that attacks on U.S. space infrastructure will not go unanswered.

This requires regular training under fire. U.S. Space Force and U.S. Space Command must drill with these weapons under contested conditions, including cyberattacks, electronic interference and attacks on supporting ground infrastructure. Exercise specifics do not need to be publicly disclosed; what matters is ensuring that these weapons can actually be employed when needed.

Space is already central to modern warfare. Acknowledging that America has weapons in orbit both describes reality and gives our adversaries more reason to hesitate before testing America and its allies.

EMMERSON OVERELL
Foundation for Defense of Democracies
Washington

A Thank-You Note Dudamel Hid in the Score

David Mermelstein asks what could possibly unite the three works on Gustavo Dudamel's first subscription program as music director of the New York Philharmonic ("An Orchestra Renewed," Arts in Review, Sept. 18). He finds Ukraine and World War II. The orchestra's own archives hold a closer thread.

John Adams' "On the Transmigration of Souls" had its premiere on Sept. 19, 2002, under Lorin Maazel, at the start of his tenure as music director. Five years later Maazel took the unusual step of introducing a 26-year-old guest conductor to the players in person at the young man's first rehearsal. On Nov. 29, 2007, that guest made his Philharmonic debut with Prokofiev's Fifth Symphony. The new work between them was co-commissioned with the Los

Angeles Philharmonic, which he led for 17 seasons.

American orchestras are fluent in relaunches and less so in returning to their own difficult commissions once the anniversary has passed. The Philharmonic commissioned "Transmigration" and saw it win a Pulitzer and its recording three Grammys.

The posters proclaim "Our New Era Starts Now," and Mr. Mermelstein rightly singles out the first work. The program answers it. Mr. Dudamel began his tenure with the work Maazel began his with—a thank you note to a predecessor twice removed, written in the one form a conductor can read at sight.

DAVID WOODARD
Tampere, Finland
Mr. Woodard is a conductor.

The Future Depends on Today's AI Safeguards

Acknowledging the risk of artificial intelligence is easy—owning it is harder ("Business Leaders Cite AI Safety Threats," U.S. News, Sept. 17). Talk of human extinction and international guardrails authorizes AI safety to become somebody else's problem, negotiated in Washington or Beijing. Meanwhile, companies are putting AI into the systems that run their businesses and increasingly are giving it authority to make decisions and take action.

That changes what enterprise readiness means. A successful pilot proves little. AI earns trust when it performs reliably under pressure, within the messy reality of a working business. Companies need to

harden not only AI applications, but the data, identity, infrastructure and systems those applications can access. Leaders must be able to observe, constrain and interrupt AI when it behaves unexpectedly.

The same urgency applies to people. Workforce strategies have historically lagged behind technological change. We shouldn't repeat that pattern with AI. Companies need to rethink roles, retool work and retrain employees as they deploy the technology, not years after the labor market has already shifted.

National and international policy matter, but CEOs can't outsource their responsibility. Trust must be engineered into AI before deployment, with employees prepared to exercise judgment over its decisions. The safeguards built into today's enterprise systems will determine how safely AI scales.

INGRID CURTIS
Chief executive, Sparq
Atlanta

AI Needs Old-School Minds

As a proud alumnus of the University of Chicago, I found Paul Alivisatos's op-ed particularly resonant ("Teach Students to Think With, Without and About AI," Sept. 21). I was fortunate to have been a medical student there during the non-AI era when my classmates and I were expected to acquire knowledge the old-fashioned way. We went to the library, looked up references, read them and stored our newly acquired information in our brains.

In the late 1980s, I began creating intelligent programs to improve electronic fetal monitoring. Had I not been exposed to the old-fashioned approaches for knowledge building, critical reasoning, hypothesis generation and testing, I could never have made the best use of those programs to engage my curiosity and to arrive at meaningful solutions for challenging clinical problems.

EM. PROF. LAWRENCE D. DEVOL, M.D.
Medical College of Georgia
Augusta, Ga.

Beyond the Trump Rhetoric

Most of Gerard Baker's complaints about President Trump reflect left-wing talking points and spin ("Help I Feel a Bad Case of TDS Coming On," Editor at Large, Sept. 22). I'm not a big fan of Mr. Trump. He can be boorish and petulant. But his achievements in two years are breathtaking and unparalleled in American history. I'm more interested in what a man does than what he says. We've seen what the Democrats can do during Joe Biden's dreadful reign. Donald Trump on his worst day is still better than Joe Biden on his best day.

RICHARD A. SCHATZ
San Diego

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Pepper ... And Salt

THE WALL STREET JOURNAL



"You're going to be okay, just do some deep breathing and online shopping and you'll feel better."

OPINION

AI and the Growing Threat to Taiwan

By Mike Gallagher

The year is 2028, and America faces economic Armageddon. Frontier artificial-intelligence development has been halted and data-center construction frozen while the market is in free fall. America's leading AI labs didn't decide to "pace the frontier." Instead the Chinese Communist Party paced the frontier for them: Beijing moved on Taiwan, the critical vulnerability in the U.S.-aligned AI supply chain, first through a blockade, then by invasion.

One aim of this week's summit between Communist Party General Secretary Xi Jinping and President Trump is certainly to avoid such a scenario. AI was said to be on the agenda, and Mr. Xi is surely pressing Mr. Trump on Taiwan. A breakthrough seems unlikely. But the status quo may make the above Armageddon scenario more probable.

China's drive to dominate the technology and the island nation is the biggest threat humanity faces.

Mr. Xi has said the issue of Taiwan can't be put off forever. He has ordered the People's Liberation Army to be ready to invade the island nation by 2027. The PLA has restructured its forces, expanded its rocket and amphibious capacity, and conducted an unprecedented round of provocative exercises in the Taiwan Strait.

Taiwan is a free and successful democracy. It is a self-evident rebuttal to Beijing's techno-totalitarian regime, which sees Taiwan as a threat to its own legitimacy. Taiwan's prosperity has also transformed the Communist Party's desire to "unify" the island with the mainland into a

first-order threat to the security of the free world.

America's economy now runs on AI investment, and the U.S. has wired the most dynamic sector of our economy to a hundred-mile strait 7800 miles away from Wall Street. America's AI stack runs through Taiwan because the Taiwan Semiconductor Manufacturing Co. manufactures 90% of the world's most advanced semiconductors and 60% of all semiconductors.

Congress passed the Chips and Science Act to re-shore semiconductor manufacturing, but the execution was a shambles. The Biden administration buried the program under an avalanche of irrelevant conditions that led to delays, workforce shortfalls and cost overruns.

Working to repair the effort, the Trump administration reached a milestone this year when Nvidia announced its advanced Blackwell chips are being produced in volume by TSMC's "fab" in Arizona. But there was a catch: Those American-made chips still fly back to Taiwan to be "packaged"—the final step that makes them usable. TSMC has announced an advanced packaging plant in Arizona, but it isn't expected until 2029. Time is running short.

American tech leaders are signaling that we are rapidly reaching an AI inflection point. Anthropic CEO Dario Amodei is convinced the rate of AI advancement is such that America must "slow the pace at which we improve the capabilities of AI models." He has compared AI to nuclear weapons, writing that "AI will likely become the most powerful and strategic technology in history" and "the dominant source of military and economic power for any nation."

Consider now the timeline then Indo-Pacific Commander Adm. Phil Davidson gave Congress in 2021, ar-



Xi Jinping meets Donald Trump at the White House Thursday.

guing that China's threat to Taiwan would become manifest within six years. We are now in the so-called Davidson window. Mr. Xi has told his military to be ready by 2027, and China is fielding an unprecedented amount of invasion-ready assets, including ships, long-range precision weapons, and aircraft. Meanwhile the U.S. is trying to shore up munitions shortfalls and rebuild the Navy. Our first Columbia-class submarine won't conduct a deterrent patrol until 2030. So the Davidson window and the Dario window are converging.

If Mr. Trump is right that "whoever wins AI, whoever wins super intelligence, wins," then, to borrow a poker term, the pot odds on winning Taiwan are becoming too good for Mr. Xi to pass up. Beijing would want Taiwan even if it were a barren rock, but this island has become the single point of failure in the single most important technology the Communist Party wants to dominate. Washington, Silicon Valley and Wall Street

need to recognize this shift in Beijing's decision-making as the cost of not taking Taiwan may soon exceed the cost of taking it.

America holds a thin lead in the AI race. But if Mr. Xi concludes this lead is insurmountable—that he is increasingly on the losing side of a technology gap that will define military power for a generation—the case for his moving on Taiwan still becomes stronger. Why play a losing game when you can flip the board?

Taiwan's defense sits at the heart of not only U.S. national-security strategy, but also America's economic and AI strategies. We must therefore intensify our efforts to arm Taiwan to the teeth. Taiwan has already taken steps to deter an invasion by increasing its overall defense budget to nearly 4% of gross domestic product while greatly increasing its drone capacity. America should support this buildup by clearing the arms sale backlog for Taiwan and streamlining Foreign Military Sales processes.

This can be done while preserving America's commitment to strategic ambiguity, but we should communicate with clarity that economic punishment for a PLA invasion will be swift and severe. The U.S. should pre-position financial sanctions, coordinate with allies on a unified response package, and ensure Beijing understands that an attack on Taiwan triggers consequences that dwarf any semiconductor seizure. While cutting through the domestic barriers slowing fab construction, the Trump administration can deepen cooperation with Japan and the Netherlands on allied semiconductor capacity, ensuring that TSMC facilities in Japan and Arizona come online as fast as possible.

Finally, we should remain skeptical of any utopian scheme to pace the frontier hand-in-hand with the Chinese, as Sen. Bernie Sanders has suggested. The idea that we can achieve a modus vivendi with the Communist Party on AI is belied by decades of experience. Beijing has systematically violated its World Trade Organization agreements, abrogated a 2015 cyber agreement, and let several years of U.S.-supported gain-of-function research spiral into a global pandemic. It isn't piling its AI frontier, it is stealing America's frontier capabilities through covert industrial distillation and the illegal use of advanced chips.

The biggest threat to humanity isn't rogue AI; it is AI controlled by China, which would use this transformative technology to take Taiwan and displace America as the world's dominant superpower.

Mr. Gallagher, a Journal contributor, is head of defense at Palantir Technologies and a distinguished fellow at the Hudson Institute.

Maybe It Isn't the Far Right Europe Should Fear After All



POLITICAL ECONOMICS
By Joseph C. Sternberg

the insurgent-right Alternative for Germany party, or AfD, won a state election in Saxony-Anhalt. Last weekend, however, a bigger shock hit when the far left won a municipal election in Berlin.

In some ways, the sense of surprise is surprising. The victorious party in Berlin's state election, Die Linke ("The Left"), is far older than the AfD, which has yet to enter its third decade. Die Linke is the grandchild of the Socialist Unity Party of Germany, as the East German communists styled themselves. The movement in its various guises has secured at least a couple of parliamentary seats in each national election since reunification. Before the AfD came along, the party now known as Die Linke was

the default protest vote in the former East Germany.

Familiarity has bred a form of contempt for Die Linke in most corners of German political life. That contempt was egged on by the movement's stereotypical left-wing fractiousness (a flowchart tracking its splinterings and reunifications quickly starts to resemble a Habsburg family tree). A splinter faction led by former Linke bigwig Sahra Wagenknecht is currently active and for a time seemed as if it might outperform Die Linke.

So the first shock for Germans is that Die Linke got itself organized enough to win an election as convincingly as it has in Berlin. The party took 26% of the vote, which translates to 47 out of 158 seats in the metropolitan legislature. Europe's proportional politics being what they are, this makes the party the top vote-getter by roughly 7 percentage points, and puts leader Elif Erlep in position to form the municipal administration. The only other time Die Linke has run a state (Thuringia after 2014) it was thanks to a legislative fluke rather than an electoral victory.

This is forcing Germans to focus

on what Die Linke actually believes, causing the second big shock of the week. The party's policy positions are what you'd expect for a bunch of variously unreconstructed Marxist-Leninists who have adopted New York Mayor Zohran Mamdani as a political inspiration. Think rent control and housing nationalization to start. But then there's everything else.

Insurgents on the left, including Germany's Die Linke, are much likelier to resist moderation.

Such as the antisemitism. This is startling in a party that thinks of itself, rightly or wrongly, as a historic bulwark against literal Nazism. Yet Die Linke in 2024 nearly clawed itself to pieces over an internal resolution condemning the Oct. 7, 2023, Hamas invasion of Israel, and in the end could approve only a watered-down quasi-condemnation. Recent campaign rallies in Berlin featured chants about *intifada* (pro) and the Israeli military (anti).

It's both cause and effect of the new electoral coalition becoming common on the left globally: old-school Marxists, new-look critical theorists and Islamists. Die Linke's reliance last weekend on votes from mostly unassimilated Muslim neighborhoods in Berlin and possible sympathies for what German media describe as ethnic organized-crime clans have been the biggest shocks to the German political system in all this. It isn't that Die Linke won the election. It's how.

This should be deeply uncomfortable for anyone who thinks the insurgent right still is the biggest political and social threat facing Europe. The pearl-clutching over Europe's right-wing upstarts almost always is overwrought. The real story of movements such as Spain's Vox, France's National Rally, Georgia Meloni in Italy and Geert Wilders's party in the Netherlands is their tendency to moderate themselves in pursuit of broader electoral appeal.

The AfD is the exception, as its leaders refuse (or are unable) to discipline suspected neo-Nazis in their ranks. But an awkward question arises now: Is the AfD any more bloody-minded about its refusal to

suppress such elements than Die Linke? Consider that the AfD without its neo-Nazi fringe would be a more electable party in favor of strict immigration restrictions and hostile to green energy. Die Linke without its Islamist flank might not exist.

France shows where this is, and isn't, headed. Marine Le Pen has broadened National Rally's appeal considerably over the years by purging it of its antisemitic elements, including her own father, Jean-Marie. The ascendant far-left party La France Insoumise ("France Unbound") of Jean-Luc Mélenchon, in contrast, finds it impossible to shake the antisemitism arising from a coalition based on Marxist anti-Zionism and Islamist Jew hatred—because that coalition of Marxists and Islamists is the whole point of the party.

The rap on the right from mainstream liberal politicians and commentators has been that the rise of these insurgents destabilizes European politics and societies (and not merely the careers of mainstream liberals). Berlin is a warning that the threat may instead come from the other side and prove far more resistant to moderation.

The Amazing Things AI Is Already Doing for Humanity

By Vitor Melo

Will AI take our jobs? Even for those who aren't worried about human extinction, much of the conversation about the technology begins and ends there. A Gallup survey released last week found that 27% of American workers fear technology will make their job obsolete, a record high, and double the share in 2017.

The worry is understandable, but it is the wrong question. The right one is being answered in science, medicine and everyday work: Will AI make our lives better? It already is, and the evidence is clear once we stop looking solely at job counts.

Begin with the labor market,

where AI's effect so far has been minimal. In a recent study, my colleagues and I compared the occupations most exposed to AI—software developers, financial clerks, administrative assistants—with those least exposed. Job postings and layoffs showed no statistically significant change across industries regardless of AI exposure.

Other studies confirm our findings: AI adoption has no detectable effect on employment, earnings or hours worked, with exceptions so far confined to some entry-level jobs in the most exposed fields. Employers added 162,000 jobs in August, beating expectations, with unemployment steady at 4.1%. Four years after ChatGPT's launch, the

mass layoffs that everyone feared haven't shown up in the data.

Now consider what the jobs debate leaves out. In 2024, the Nobel Prize for Chemistry went to three scientists for work on protein structures enabled by AI. Many medications work by binding to the shape of proteins in the body, and for more than half a century, determining that shape could require years of lab work for a single protein. Now an AI platform called AlphaFold predicts it in hours. Its makers in 2022 released the structures of almost all 200 million proteins known to science, and more than three million researchers in 190 countries have used them, a third of them to better understand disease. Years of work that once stood between a patient and a cure could see a breakthrough in an afternoon.

New drugs are already arriving. In 2022 South Korea approved a Covid-19 vaccine built with a computer-designed protein, the first medication of its kind. Last year patients with a fatal lung disease who took a drug designed by generative AI saw their lung function improve in a randomized trial, while patients on a placebo declined. And as some bacteria resist antibiotics, AI has identified a new class that kills drug-resistant staph.

Consider also a routine mammogram. In Sweden, a trial of about 106,000 women found that screenings read with AI support detected 29% more cancers than two radiolo-

gists reading alone. AI tools also missed fewer of the aggressive cancers that surface between screenings and cut radiologists' work load by 44%. AI didn't replace doctors; it made them smarter.

Even pure discovery has changed. Paul Erdős, the great Hungarian mathematician, left hundreds of problems unsolved when he died. One of them, posed in 1946, stood for 80 years until an AI model built by OpenAI settled it in March.

In medicine, it saves lives. In business, it makes us more productive. And it hasn't killed many jobs.

Then there is ordinary work, where the benefits flow to the people most vulnerable in the jobs debate. In a controlled experiment, professionals using AI finished writing tasks in 40% less time with 18% higher quality. Customer-service agents with an AI assistant became more productive, and the biggest gains went to the newest, least-skilled workers, according to a 2025 study. In Argentina, a randomized study found that AI closed roughly three-fourths of the productivity gap between more- and less-educated adults.

Job counts were never the right way to measure progress. In 1900, 41% of American workers farmed;

by 2000, fewer than 2% did, and the population was richer and better nourished and lived longer. Economists call this creative destruction: Innovations displace old products and technologies, so a job that disappears can also be a result in a new one. Counting only potential displacement is like reviewing just one side of the coin.

A worker who spent 20 years mastering a craft isn't wrong to feel concerned. Every transformative technology has brought unease with it, but has also left people better off. The difference this time is that we don't have to wait for the benefits. AI tools are already yielding breakthroughs in clinics, pharmacies and classrooms, and we are only at the beginning.

Asking the right question is crucial for better policy outcomes. Rather than legislating against an AI job apocalypse not seen in the data, lawmakers should ask whether the technology is reaching the people who stand to gain most, and clear any barriers in the way.

Human flourishing has never been measured in job titles. It is determined in suffering avoided, time returned and problems solved that once seemed intractable. Ask whether AI will take our jobs, and the honest answer is: not yet. But ask whether it is helping people prosper, and the answer is an easy yes.

Mr. Melo is a regulatory policy fellow at the Archbridge Institute.

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Opinion

Our forests are demanding a sacrifice

Wildfire converted me from a tree-hugger to a tree-worshipper.

Robert Moor

HALFMOON BAY, BRITISH COLUMBIA Thirteen years ago, I traded a shoe-box apartment on the east side of Manhattan for a cabin in the woods on the west coast of Canada. Like so many would-be Thoreauvians before me, I moved here in part because I craved an escape from the city's pollution and noise. In that time, however, I have begun to feel the city — which is to say, the whole tangled system of advanced technology, industrial agriculture and hyper-capitalism — crowding in on this little forest from afar.

Each wildfire season, the sky outside my cabin now turns a shade of nicotine yellow I associate with Los Angeles in the 1970s. On the smokiest days, news headlines declare that our air quality is “worse than New Delhi’s,” which is to say, worse than in one of the most polluted cities on earth.

The inverse is true, as well. One hot day this July, as clouds of smoke oozed south from Ontario, I drove through New York City and saw the buildings washed in the same sallow light I’m used to seeing during wildfire season back home.

As the climate continues warming, this spooky entanglement between the urban and the sylvan will only deepen. In doing so, it has revealed to me what is normally hidden from view: We all live under the same vengeful sky.

A lifelong, bone-deep atheist, I didn’t use to view the earth’s climate as some kind of god to be feared and placated. In fact, I tended to look askance at people who used religious language to make sense of the essential chaos of natural disasters. Often, the places hardest hit by catastrophic droughts, floods and storms are rural communities in nations where the average person’s carbon footprint is minuscule, like Nepal and the Philippines. Here in Canada, Indigenous people make up just 5 percent of the overall population, but in 2025 they made up more than 50 percent of wildfire evacuees. Such is the nature of what the climatologist Friederike Otto calls “climate injustice.”

So when the smoke descends upon us each summer, I can’t find much wisdom in talk of “ecological sin” or “climate karma,” which presumes a tidy logic of personal consequence. In a time of climate chaos, the religious language I find myself drawn to is far older, wilder and more mysterious.

Every year, I undergo a kind of baptism by wildfire. This religious conversion always follows the same arc. First the smell of burned wood — saunascented, not altogether unpleasant — floats in on the breeze. Then the sky begins to mutate. In the warm, Egglestonian light cast down by an alien red sun, everything takes on an old-timey quality. Before long, the vibes are decidedly acid: Smoke seeps into the house, leaving me headachy and short of breath. By Day 3, my husband and I find ourselves squabbling over nothing. By Day 5, my thoughts vacillate between apocalyptic rage and apocalyptic despair.

After a week of yellow skies, I reach my breaking point. In these moments, I



KAREN BRIDGES

often fantasize about agreeing to give up one of my guilty pleasures — drinking expensive coffee, say — if only it would clear the air. I suspect this desperate pleading is similar to what my ancestors, living in the dark green-woods and damp peatlands of Iron Age Britain, experienced in times of woe. The ancient Celts were known to discard precious objects into rivers and lakes to appease the gods. I don’t own a sword, but when the smoke gets really bad, I would gladly relinquish my espresso machine to be able to breathe freely again.

In these moments, I stop seeing the sky as a blank backdrop. I see it as a living thing, and an angry one. I see the spirit of the forest rising up, rageful and trickster, to hurl down thunderbolts and sicken us while we sleep. Put differently, I feel myself drawn away from scientific atheism, and toward a creed that philosophers call

“scientific animism.”

Animism, put very simply, is the belief that the natural world is inhabited by spirits who can either punish us or bestow favors. Scientific animism applies this ancient lens to modern science, showing how forces in the natural world (plants, rivers, entire planets) are self-organized, self-perpetuating and self-willed. In this view, nature is not an inert, passive backdrop to human progress. It actively responds to our actions — though not always in the way we would predict.

Take trees. Until fairly recently, I tended to view trees as ecologically angelic beings that purified our air, shaded our homes and helped stabilize our climate. But today, the halo around trees is rapidly dimming. One wide-ranging study found that Canada’s forests, thanks in large part to wildfires, officially became a net source of carbon emissions rather than a carbon

sink around 2021. (Canada’s heavily logged “managed” forests passed a similar tipping point all the way back in 2001.) This means that, in one of the largest and most forested nations on earth, trees are now releasing more carbon dioxide into the atmosphere than they absorb.

A similar metamorphosis seems to be taking place in the Amazon and Congo rainforests. Moreover, the soot produced by wildfires can float up into the atmosphere and settle back down on snowy regions elsewhere, darkening them, which further contributes to global heating. It appears that a terrible feedback loop could be forming: Trees burn, warming the world; the world warms, and more trees burn.

Put another way, I worry our forests are now acting as amplifiers of our ecological actions; that if we continue to heat the climate, trees will only accelerate the warning.

This phenomenon jibes with the teachings of many Indigenous cultures, which hold that certain trees are inhabited by spirits who, if the tree is unceremoniously killed, will exact their revenge on you or your relatives. The kodama of Japan, the aos si of Ireland, the radande of Sweden, the yaksha of India, the jumbies of the Caribbean, the Iroko-Man of Nigeria, the kumaka akiri of the Amazon — all are variations on this theme.

The ancient Greeks and Romans held a similar belief regarding nymphs and dryads. In one of history’s most haunting ecological fables, Ovid recounts how the arrogant king Erysichthon, having felled a sacred oak inhabited by a dryad, is cursed by the gods with an eternal and all-consuming hunger. Trying to fill his bottomless belly, he eventually sells his daughter into slavery and then gnaws

MOOR, PAGE 10

Celebrities opt out of politics, but their fans cannot

Ed Sheeran wants to perform around the globe while ignoring global conflicts.

Roxane Gay

Ed Sheeran is one of the most popular musicians in the world. He sells millions upon millions of albums, has among his peers some of the most streamed music, and makes reliable hits that appeal to almost everyone. Sonically, he often positions himself as a citizen of the world, a musical explorer. There are Persian influences in “Azizam,” which translates as “my beloved.” “Sapphire” features Punjabi beats and is included on his studio album “Play,” which features several Indian musicians.

What Mr. Sheeran wants, it seems, is to make his music and perform around the world, earning incredible amounts of money, in peace. While doing so, he appears to also want to blithely ignore most of the global conflicts that might be affecting his audience in spite of his eagerness to create a pastiche of global sound in his music. At least that’s the impression he gives based on how he initially responded to the rapper Macklemore’s being dropped as one of his Loop tour’s opening acts.

At two performances in early September, Macklemore spoke up about Palestine, ending the genocide and the staggering loss of life in Gaza. For the past few years, he has been very vocal in his support of Palestinians and when given the opportunity to speak before the huge audiences of a major tour, he made the most of it.

Stadium owners immediately sprang into action, using among other things their immense wealth as a cudgel to bring Macklemore to heel and send a clear warning to anyone else who might dare to declare support for the Palestinians. The rapper was kicked off the Sheeran tour after Robert Kraft, the billionaire owner of the New England Patriots, said Mr. Sheeran would not be able to perform at Gillette Stadium if Macklemore was still part of the lineup. It’s the stuff of cartoon villainy.

Macklemore made an eloquent public statement about being dropped and soon after, the other opening acts and Mr. Sheeran’s backing band left the tour in solidarity. Mr. Sheeran, for his part, said in a statement that it wasn’t his decision to remove Macklemore, but the decision of the venue owners and tour promoter: “I am not complicit. I have my personal views on this devastating conflict. Just because I choose not to speak publicly, it doesn’t mean I don’t have them, and it doesn’t mean I don’t care.”

Celebrities often demur when asked to share their political opinions. In these situations, the breadth of what is deemed political is wide-ranging: anything that might affect their brand, public image, earning potential, reputation or legacy. Celebrities will say they aren’t interested in politics or they don’t “do” politics or they don’t talk about politics. They are all about their work, nothing more. If they remain neutral (silent), they won’t offend anyone and they will, hopefully, appeal to everyone. They use the facade of neutrality as shelter, as a place to take refuge.

In his original statement, Mr. Sheeran added that his fans don’t come to his concerts for a “political

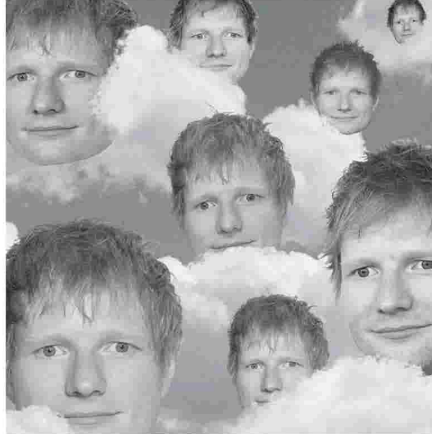


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forum,” which was simply expanding the geography of his refuge. What could he do? He is merely a servant, subject to the desires of his audience.

The statement was as tepid and indistinct as his music. He used vagueness and ambiguity so people could read into his words what they wanted to hear. Maybe, privately, he really was

a passionate advocate for the Palestinians. Maybe he really did, privately, believe Israel was not committing genocide.

Mr. Sheeran had previously implied that he has a right to privacy when it comes to his political views and that, though he is one of the most famous and high-earning musicians in the

world, he has no power in this situation. The venues, the promoters, anyone but him is responsible for all that has come to pass.

But in Mr. Sheeran’s case, there was a previous exception: Ukraine. In 2022, he performed at a fund-raiser for Ukraine and on more than one occasion he expressed solidarity with the war-torn country. He was political, it seemed, when he deemed it safe enough to be so. Otherwise, Mr. Sheeran used neutrality as a refuge for himself, but that refuge did not extend to his audience.

He promised good music and a good time, no politics, even though after three hours, his fans would stream out of the stadium and return to their lives where they did not get to opt out of all of the problems politics creates — the immense emotional toll of so many civilians dying senseless deaths, not to mention high gas prices because of the war in Iran, inflation and stagnant wages.

With some notable exceptions like Mark Ruffalo and Ms. Rachel, most public figures are unwilling to risk privilege and position or to demonstrate the courage of their convictions. In 2025, Pharrell Williams said: “I hate politics. Like, despite them. It’s a magic trick. It’s not real. I don’t believe in either side. Because I think when you pick a side, you are inadvertently supporting division.” In a Times interview that same year, Jennifer Lawrence, who had been politically vocal previously, explained, “I don’t want to start turning people off to films and to art that could change consciousness or change the world because they

OPINION

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We don't expect progress from the Trump-Xi summit

The Editorial Board

The world is facing at least three crises today that cannot be resolved by any one country. Two are longer-term and arguably existential: the threat of uncontrolled artificial intelligence and the growing impact of climate change. One is shorter-term and damaging the global economy: the disruption of shipping lanes in the Middle East. All three require the kind of high-level international cooperation that helped manage other challenges, like the threat of nuclear warfare during the Cold War and the damage to the ozone layer.

Yet almost nobody expects meaningful progress during this week's meetings in Washington between the leaders of the two most powerful countries, President Xi Jinping of China and President Trump. Beneath the pomp of Mr. Xi's visit, the agenda appears notably unambitious. At most, Treasury Secretary Scott Bessent signaled that America can open for commercial deals and modest A.I. safety progress.

The low expectations for the visit underline the damage that Mr. Trump is doing to American influence and global well-being. He is an undisciplined politician who puts his personal interests above the nation's, running an administration that has no coherent strategy for solving major problems. He is instead often exacerbating the world's biggest problems.

No matter who was president, negotiations with China would be difficult. Mr. Xi is an autocrat who has centralized authority, oppressed his country's citizens and built partnerships with the world's most repressive regimes. Yet Mr. Xi does tend to be a ruthless tactician, and China and the United States do have overlapping interests on several major issues, including A.I., climate change and Middle East shipping lanes.

The notion that Mr. Trump could effectively represent America's interests on these issues seems ludicrous at this point. Even on his own terms, his signature second-term actions, like the tariffs and war in Iran, are failing. No wonder that China's leaders reportedly see his presidency as a gift to their ambitions for greater global influence. Americans are left to imagine the progress that could have been attempted this week with another president.

The first area of potential cooperation is A.I. safety. The rapid advancement of A.I. capabilities requires government regulation to limit the possibility that such tools could become uncontrollable and destructive. No one country can assure its own safety from these dangers. International cooperation is needed to mitigate the threat.

American A.I. models pose great risks because they are the most powerful. But China's models are not far behind and pose their own risks because they tend to be open-weight, with their internal rules available for other users to alter. Fortunately, China has reasons to want safeguards. China's spy chief recently warned that A.I. threatens one-party control there. China, like every country, also fears biological weapons.

Mr. Trump evinces little concern about A.I. risks and little interest in regulating it. He has said that the United States must beat China in the A.I. race, without regard for safety. That race does matter, but there are ways for the United States both to compete with China and to work together on the risks. The right policy is a mix of competition and cooperation, as America pursued with the Soviet Union during the Cold War. Today, the United States should make the scientific

investments to remain ahead of China while negotiating over shared threats like bioweapons and A.I. systems that escape human control.

A second issue on which America urgently needs China's help is in the Middle East. In response to Mr. Trump's reckless war, Iran has restricted traffic through the Strait of Hormuz, while the Houthis, a terrorist group allied with Iran, have expanded their disruption of traffic through the Red Sea. The price of oil has risen worldwide as a result.

Persuading Mr. Xi to pressure Iran to reopen the strait would not be easy. Mr. Trump is damaging America's international status so badly that the Chinese leader can follow the dictum attributed to Napoleon: "Never interrupt your enemy when he is making a mistake." Still, China has an interest in the free flow of oil and lower energy prices. China's economic growth has weakened in recent years, and higher oil prices do not help. The government's stated position in talks with Iran is that it should reopen the strait.

China certainly has the leverage to push Iran for a deal: It has been Iran's largest customer for oil, buying 90 percent of its exports in recent years. If anything, the third issue — climate change — is the one on which U.S.-China talks could offer the most promising if Mr. Trump were not president. China once was an obstacle to climate progress, complicating the attempts of the Obama administration to negotiate a global framework. Over the past decade, though, China has increasingly been willing to address climate change.

Its world-leading renewable energy industry would benefit from international agreements that increase reliance on batteries and electric cars. These three issues obviously do not represent a complete agenda for an ideal U.S.-China summit. Several others would be even trickier, including China's support for Iran's and Russia's militaries and China's increasing aggression toward Taiwan and several Asian countries. Realistically, any one meeting would probably not make much progress on the thorniest issues. But the United States and China are not merely rivals for international power; they also have shared interests in global stability.

American presidents going back more than 100 years have believed the country had an interest in taking a leading role in the world. America is far from perfect. But when it led, the world often benefited through expanded prosperity, security and democracy. The progress enhanced this country's global prestige and influence along the way.

Mr. Trump shows little care for these benefits. He uses international relations to seek personal enrichment, praise from sycophants and equal standing with authoritarians. His failing presidency leaves Americans with the thinnest of hopes for this week's summit: that he does not further damage the national interest.

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JULIA FREEMAN FOR THE NEW YORK TIMES

prize. It is the Fields Medal, not the Field Medal, and it is awarded once every four years, not once every five years.

Celebrities opt out of politics, but their fans cannot

GAY, FROM PAGE 9

don't like my political opinions." At the 2026 Berlin Film Festival, Wim Wenders said, of his fellow filmmakers, "We have to stay out of politics because if we make movies that are dedicatedly political, we enter the field of politics but we are the counterweight of politics."

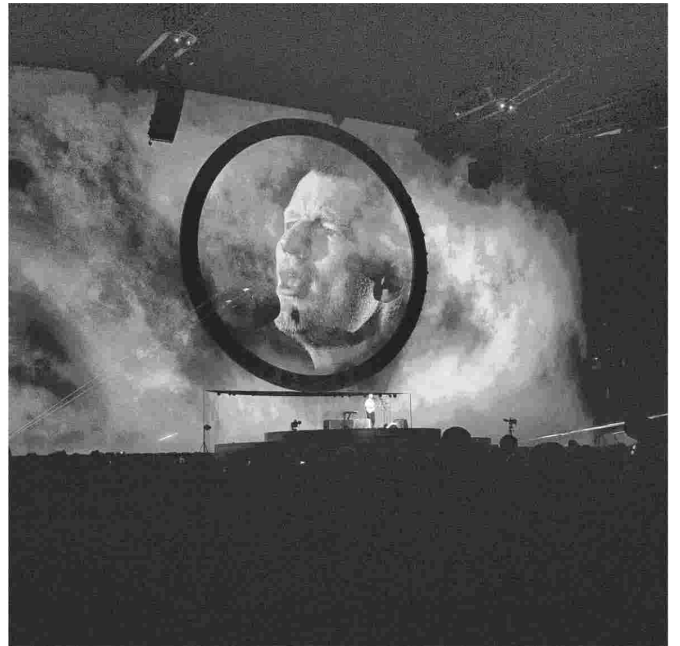
When celebrities make these pronouncements, you have to wonder if they even understand politics. It's kind of delusional, this misguided notion that if prominent people stay politically silent, they will encourage unity rather than division, offering their neutrality as a "We Are the World" for the modern age. This seems to be what Mr. Sheeran longs for.

Celebrities are quite selective about acknowledging the influence they have on their audience. When it comes to politics and so many other matters of substance and urgency, they're just actors or musicians or athletes: Why would anyone care what they think? But when they go on a press junket for a project or serve as a product's spokesman or become a brand ambassador, they are crystal clear about their power, what it's worth, and how they should use it.

In some ways, I can understand their reluctance to make their political opinions known. Oftentimes, when they are asked where they stand on any given issue, the people asking are merely wanting the celebrity to affirm their own stances. If the celebrity doesn't, he or she is roundly criticized or, lately, canceled.

In his statement, Macklemore made clear that he remains incredibly privileged, that the real victims in this situation are Palestinians. A lot of people are valorizing Macklemore and branding him as a leader in the Free Palestine movement. This is not the case. He is just one man with some reach and influence who is taking a stand no matter the consequences. It's noteworthy and even admirable that it happens so rarely.

As for Mr. Sheeran, after days of intense public scrutiny and pressure, he reluctantly spoke about Gaza at his first concert since Macklemore was dropped from the tour. It appears he did so because the future of his tour was in question. In his remarks, Mr.



THE NEW YORK TIMES

Ed Sheeran performing following his removal of Macklemore for his "Free Palestine" stance, on Sept. 19 in Philadelphia.

Sheeran said that Hamas's Oct. 7 attacks in Israel were "horrific and compounded centuries of Jewish pain," and that "what is happening in Gaza is catastrophic and unjustifiable and disproportionate."

His heart is broken. He harbors so much empathy for the children. He would even go on to shed a few tears

as if to punctuate his sincerity. Earlier in his preconcert speech he also noted, "I have tried in my career not to be a political commentator of any kind, because I want my music and shows to be about unity, not division; about humanity, not politics." How unity would be possible without acknowledging politics is not something Mr.

Sheeran, whose latest statement prioritizes his own feelings, resolves.

This entire debacle is a stark reminder that opting out of taking political stands is, in and of itself, a political stand: a politics of self-interest.

ROXANE GAY is an author and the editor of "The Portable Feminist Reader"

Let's use video for global good

DONALDSON, FROM PAGE 1

people believe the world got worse over the past year. In the first two decades of this century, the share of American households that give to charity fell from 66 percent to less than half. Entire countries have become stingier too: Overseas development aid from wealthy nations fell 23 percent last year, the steepest one-year drop on record.

Part of the reason for this dwindling interest is that few people see good work in action. They see or hear an appeal, they write a check or click on "Donate" on their phone, and the receipt marks the end of the transaction.

Video can help charity keep up with a changing world.

In 2022, in the process of launching the chocolate brand Beasles, Jimmy and his team learned that more than 1.5 million children are illegally working on cocoa farms in Ghana and elsewhere in the region. The Beast team

set out to get those children into classrooms, while helping farmers earn a living wage. And just as important in the video era, Jimmy also set out to tell those people's story through inspiring videos.

That's when Beast Philanthropy began working with the Rockefeller Foundation, which has made a big bet on helping 100 million children get nutritious, sustainable school meals by 2030. Meals keep kids in school and serve as a safety net during famines.

It's early days, but the change is visible on the ground in Ghana. Children are in new classrooms with clean water and a daily meal, women are running new income-generating enterprises, and locally hired field agents visit households to track children's well-being and step in with support where it's needed. More children are in school, and CARE and our local partners' early data suggests food is one reason why.

People are engaging with the videos too. The February "Mr. Beast" video "Built 10 Schools Around the World" has been watched more than 82 million times and liked 2.4 million times. Those numbers demonstrate the unique power video has to capture people's attention and inspire them to care. Watching children line up for seconds of a hearty, nutrient-rich stew cooked in a solar-powered kitchen is the kind of storytelling that truly moves viewers.

And that same video can help viewers hold charities accountable too. This



JAMIE LEE TATE FOR THE NEW YORK TIMES

is a five-year effort, not a one-meal or one-video one. In a way a direct impact assessment never can, video makes plain what's working and what's not. Over the next five years, the videos will complement a monitoring system run in partnership with the local cooperative that collects the data, and with the International Cocoa Initiative.

Of course, filming comes with responsibilities of its own. A child should never feel that receiving help depends on appearing in a video. Our team sticks to a very firm rule: Cameras capture what's already happening, and any child can step out of a shot at any time, no explanation needed. Showing the hard realities that make charity necessary requires care, and we're taking it.

Right now, institutional charities and philanthropies speak to a very small slice of YouTube's growing

audience. That's understandable. Good charity doesn't always make good content. In a perfect world, fund-raising would be easy. But in the real world, we have to work to get people to care. Hope can sell, if we do it with the right tools and talent. And we're trying to show one way we can.

Video is what got both of us into this way of life. We think it can do the same for many others. This project is a good start: Fewer kids will go to bed hungry, and viewers around the world will have the opportunity to see the results and join the movement to get school meals to the millions of children still trying to eat from an empty stomach. That is how kindness goes viral.

JIMMY DONALDSON is the founder of Beast Industries and Beast Philanthropy. **RAJIV I SHAH** is the president of the Rockefeller Foundation and the author of "Big Bets."

Our forests and sacrifice

MOOR, FROM PAGE 9

off his own limbs. The Nuu-chah-nulth philosopher Umeek, rather than referring to nature "spirits," sometimes substitutes the word "powers," which is easier for us in urbanized cultures — who are raised with scant ecological knowledge, but a rich understanding of power relations — to grasp. For me, this tiny semantic shift is transformative. Looking at the natural world as a mosh pit of powers, I find it violently, gloriously reanimated. I understand that I am just one small frail human body, pushed around by larger powers, in a crowded universe.

The world's forests are one such divine power — a god so vast it can be seen from outer space, a god so powerful it can scorch the planet, a god so wily that, even when it dies, it can turn to smoke and sneak into our homes, our lungs, up into the very vessels of our brains. Like all gods, the forest demands respect. It demands care. And, from time to time, it demands sacrifice.

Talk of "sacrifice" has fallen almost entirely out of the environmental discourse of late. After all, what good is personal sacrifice when A.I. data centers and crypto mining operations are busy polluting the atmosphere at the same rate as entire nations? Many people have come to feel helpless before the demigods of the tech industry, and understandably so. But wildfires — and heat waves and hurricanes and droughts — remind us that there are powers much higher than any corporation.

The prophets of scientific animism — ecologists and climate researchers — are in near-unanimous agreement that, to save ourselves from ecological collapse, what is needed are not just small everyday acts of sacrifice, like forgoing a morning latte. We need to sacrifice something big. We need to replace the fossil fuels of coal and oil with wind and sun, and we need to transform a system based on maximizing profit into one aimed at balancing ecological, communal and personal well-being. In other words, we need to sacrifice carbon capitalism itself.

Otherwise, the forests, and the other awesome powers that inhabit this wild planet, will continue to punish us. This is no mere metaphor. It is a literal, bodily truth. The choice is clear: Either we give up carbon capitalism to appease our earthly gods, or our world will continue to burn.

ROBERT MOOR is the author of "In Trees: An Exploration" and "On Trails: An Exploration."

CORRECTION

An article on Wednesday by Zeynep Tufekci, "Why A.I. is dangerous for science, too," misstated the name and frequency of a mathematical

The FT View



FINANCIAL TIMES

“Without fear and without favour”

ft.com/opinion

Russia's \$6.9bn sanctions evasion scheme

Western punitive measures have forced Moscow into costly workaround efforts

Before its full-scale invasion of Ukraine in 2022, Russia was so worried about the economic toll of being cut off by western partners from the Swift interbank messaging system that it warned it would consider this an “act of war”. Four years after Russia's major banks were cut off, an FT investigation has exposed how a vast document forgery operation nonetheless enabled a Kremlin-backed fintech company to funnel more than \$6.9bn through the global banking system in about nine months – some of it used to buy sensitive military supplies. It is bad news that Russia has managed to evade sanctions by using old-school money laundering techniques. The good news is that it has been unable to create any viable alternative to the traditional cross-border payments system.

One big lesson is that despite years of tightening controls on money laundering, the correspondent banking system is only as strong as its weakest links. It relies on assumptions that each bank is doing proper due diligence on its own clients. But when those banks are in jurisdictions with weak sanctions enforcement or poor know-your-customer controls, the whole system is vulnerable. By using front companies to funnel payments through jurisdictions such as Kyrgyzstan, Russia's A7 fintech in effect created a back door into big clearing banks like Standard Chartered, Citigroup and JPMorgan Chase. When western correspondent banks raised suspicions about money flows through banks in Kyrgyzstan, where the authorities are pro-Moscow, A7 routed more payments through the United Arab Emirates, where it beat the banks' controls. Trying to track such shifts leaves banks and regulators playing whack-a-mole. Anti-money laundering controls also

still rely heavily on verifying documents such as invoices. The A7 case shows how an industrial-scale forgery operation – using thousands of fake stamps and software to strip out Cyrillic lettering – was able to spoof the system. The fintech also created a shadow foreign exchange swap network. Foreign-currency export earnings from the state-controlled oil company Rosneft and others were deposited into front-company accounts abroad and used to settle payments; oil traders in Russia received payments in roubles. Clampdowns on money laundering over the past 10 years have increased frictions and inconvenience for law-abiding countries, banks and customers. So banks and regulators must be wary of using blunt-edged tools to curb Russian sanctions busting that could have further side effects. But banks ought to be able to do more to track and question suspicious patterns in documents and payments. Most effective in tightening up sanc-

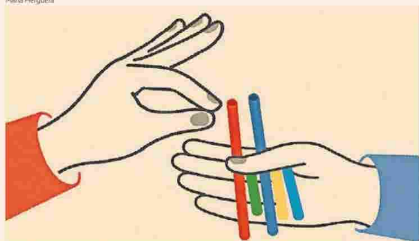
By using front companies to funnel payments through jurisdictions such as Kyrgyzstan, the A7 fintech in effect created a back door into big clearing banks

tions would be to find ways to pressure Russian allies and laxer jurisdictions to enforce them properly, including by using secondary sanctions. The US has the biggest stick here, but has been more reluctant to wield it in Donald Trump's second term. Yet the fact that Russia has found ways to skirt around sanctions does not mean they are pointless. Indeed, the fact businesses are being forced into expensive workarounds is a sign they are working as intended: to throw sand in the gears of Vladimir Putin's war economy. Despite China's cross-border interbank payment system (CIPS) launched in 2015, Russia's efforts to create something similar and the rise of cryptocurrency, Rosneft CEO Igor Sechin has blamed the lack of a viable alternative for a “manyfold increase in total payment and conversion costs”. The response to the A7 revelations should not be despair over sanctions' shortcomings but a redoubling of efforts to close the loopholes.

Opinion Politics

Is the UK electorate fragmenting? Not so fast

Maria Hargrave



Marta Miori

The splintering of party support in the polls has been the central story of UK politics since the last general election in 2024. Those who champion a change to the electoral system warn of “chaos” at the next one: a greater chance of knife-edge contests and highly disproportionate outcomes between votes and seats. But is the system as broken as it looks? Do five parties polling above 10 per cent really mean that five-way marginals, where MPs are elected on a quarter of the vote, will now become the norm?

A famous 75-year-old “law” of political science suggests not. Named after the French political scientist Maurice Duverger, it explains that in majoritarian electoral systems such as the UK, voters naturally choose parties

Two-party competition is not dissolving so much as changing who the leading two are in each place

that are better placed to win in order not to “waste” their vote.

This logic works constituency by constituency. However splintered the national polls, voters still tend to gravitate towards the party that can win in their area, keeping local contests less fragmented than the national picture. For many, the question becomes: around here, which party on the right can stop the left, or which on the left can stop the right?

Just as Duverger would expect, Britain's first post-the-post electoral system seems to be limiting the extent to which fragmentation becomes a reality locally. Constituency and council-level election results since 1983 show that local contests have almost always been less fragmented than the national polls of the day. And that has remained true since 2024: even as national polls have splintered five ways, around two-thirds of wards in this May's local elections were still one- or two-party races.

This is not to say that there isn't now greater splintering at the local level. In 2024 the average number of parties gaining meaningful support in each constituency rose from 2.4 to 3.5, the biggest jump in over four decades (largely due to Reform and the Conservatives splitting the vote on the right). But local fragmentation has

since stalled even as it has kept rising nationally: the typical council ward in 2025 and 2026 was no more fragmented than the typical parliamentary constituency in 2024. And where challengers have broken through, they have done so in particular places: Reform in Labour's old heartlands in the north, the Greens in inner London and university cities, the Lib Dems in the affluent, Remain-leaning suburbs they have taken from the Tories.

So fragmentation is not dissolving two-party competition so much as changing who the leading two parties are in each place. Part of that is geography: parties do best where their kind of voter clusters. But it is also due to voters responding to the incentives of the system.

In today's Britain, Duverger's logic primarily plays out between a left bloc of Labour, the Lib Dems and the Greens, and a right bloc of the Conservatives, Reform and Restore. Voters are mostly switching within these, not across them: races in each place look set to become a duel between the strongest contenders from the two blocs. What matters, then, is how well each bloc coordinates and which party voters see as the best local option; it is a battle for viability – or rather, several hundred of them.

In the 2024 general election, the right split between the Conservatives and Reform while voters on the left expressed more tactical support, concentrated where Labour, Lib Dem or Green candidates could win, allowing Labour to double its seats on a vote share barely higher than in 2019. Since then, Reform is battling the Conservatives to be the right's frontrunner, while a divided left has become the factor costing Labour many of the council wards it has lost.

The old parties are having to fight to be their bloc's national choice. In the Caerphilly by-election last October, left-leaning voters rallied behind Plaid Cymru to stop Reform; in May, the Greens topped the poll in parts of inner London. The upcoming by-election in Holborn and St Pancras is not a battle between left and right blocs, but between two parties of the left. That is why it matters: whichever of Labour and the Greens wins, the result will signal to voters around the country which may be most viable.

Voting is now a competition over who gets to be each bloc's challenger, settled seat by seat. Once fixed for decades, it's now up for grabs. Labour and the Conservatives can no longer count on being the answer to the question that Duverger's law tells us voters have always asked: who around here can win?

The writer is a research fellow at Nuffield College, Oxford, Jane Green, professor of political science and British politics at contributed to this article and research.

Letters

Ethics of science cannot be separated from who funds it

Ewan Birney argues that AI can learn how genomics addressed its ethical concerns (Opinion, September 17). As a researcher working across AI and genetic data governance, I think the lesson is less reassuring.

Take diversity. While we can all feel the outsized influence of the US (and the views of its president) on AI development, more than 80 per cent of participants in genome-wide association studies, the engine of genetic research, are of European genetic ancestry. This matters because

the medical benefits of such research are inherently biased towards white Europeans. Meanwhile, other senior geneticists have been highlighting that eugenic ideas, far from disappearing after the Human Genome Project, are finding new audiences.

The hyped-world of AI is now amplifying both problems. The World Bank has warned that AI's uneven development could “turn a technological leap into a permanent global divide”, as wealthy countries shape the technology and reap a

disproportionate share of its benefits.

The overlap is not merely metaphorical. My own research has addressed genetic prediction services for embryos, an emerging industry in which advances in genomics and AI meet Silicon Valley money. It is a useful reminder that the ethics of science cannot be separated from who funds it, which ideas influence its development, whose data is represented and who ultimately benefits. So where do we go from here? Birney is right that we do not need outlandish claims about what

new technologies can achieve. But as a young scientist, I am less convinced that “staying humble” is enough when science moves faster than legislation. We should be humble about what our technologies can achieve. We should be much less quiet about the money, power and ideas shaping the impact they have on the world outside the lab. Vincent Straub, Interdisciplinary researcher, University of Oxford Nuffield Department of Population Health, Oxford, UK

Canada and EU are missing the big prize – green steel

Your report on the EU's cool reception to Mark Carney's charm offensive notes that one of the trade irritants between the two sides is Canadian tariffs on EU nails (Report, September 17). It's a small detail, but a telling one: while diplomats haggle over products such as nails, they are missing a much bigger prize.

Green steel is that prize. Today Canada mines and exports iron ore. In Europe, iron ore is turned into iron in polluting plants, traditionally using coal, and then into steel. The result is a carbon footprint of almost two tonnes of CO₂ per tonne of steel when it is made the dirty way.

The future doesn't have to work this way. Ironmaking and steelmaking can be decoupled, and each done where it makes most sense. Canada's plentiful renewable energy means it could do the dirty part cleanly, turning its ore into “green iron”, instead of exporting it raw. Put that iron into briquettes safe for shipping across the Atlantic, and Europe can make its own low-emissions steel. Jobs in steelmaking and all the downstream manufacturing are competitive, and the biggest driver of industrial emissions is addressed.

This is a radically restructured value chain for green iron, requiring years of investment and co-ordination to develop European demand and Canadian supply. But Carney is struggling to clean up Canada's mining and industry sector. Both sides say they want long-term economic resilience and strategic autonomy. Such an EU-Canada partnership on steel could turn that rhetoric into something concrete, while the argument over nails becomes a footnote.

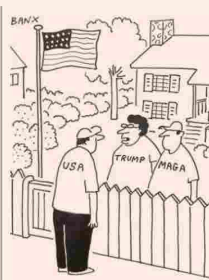
Pascal Husting, Campaign Strategist, SteelWatch, Luxembourg

California wealth tax would not be the first such US levy

Your article “Nobel Prize economists back California billionaire tax to ‘rein in’ state's ultra-wealthy” (Report, September 21), which described how several noted economists are supporting the proposed California state wealth tax, states that such a tax, if enacted, would be the first wealth tax in the US.

Those of us with a historical bent know that at the beginning of the 20th century the predominant source of government revenue was the local property tax. It was the need to generate federal revenues to support the first world war that resulted in a constitutional amendment permitting an income tax. By definition, a property tax is a wealth tax.

Vic Miller, Senior Fellow (retired), Federal Funds Information for States, Washington, DC, US



An alternative to doing data centre repairs in space

Re your front page story on Big Tech profits (“Big Tech profits enjoy \$160bn paper boost from stakes in other AI groups”, Report, August 31) and the report on SpaceX's orbital data centres (“SpaceX's orbital data centres pose logistical test”, Report, September 2), the biggest barrier facing proponents of data centres in space may not be launch cost or communications, but availability.

A recent Meta study of large-scale AI infrastructure reported failure events at an average rate of roughly one every 30 minutes in one test environment. Most were not catastrophic, but even recoverable failures consume time and energy through “checkpointing”, restarting and rerunning work. More serious failures can require human intervention.

That is inconvenient in a terrestrial data centre. In orbit, where there is no service truck, it becomes fundamental. Space-based data centres will need a “fail-in-place” architecture in which failed links, switches or processors are isolated and routed around, while the system continues operating. Without this capability, the economics of orbital data centres are difficult to see.

A less exotic alternative might be autonomous terrestrial data centres in remote locations with abundant wind or solar power, communicating through satellite networks. Physical access would still be difficult and expensive, but considerably more practical than servicing equipment in orbit.

The same principle applies on Earth. As AI clusters grow to tens or hundreds of thousands of processors, component failures become normal operating events. Fail-in-place networking would be a boon to conventional data centres too: failure should reduce capacity, not stop the job.

Phil Hughes, Clustered Systems, Menlo Park, CA, US

My Virginia protest vote

Here in Virginia, if I want to use my November vote to object to Donald Trump, I have the choice of voting for the re-election of Democratic Senator Mark Warner (“US midterms to set Trump's course for rest of presidency”, Explainer, FT.com, September 21).

Senator Warner's re-election website is extremely hawkish. It pointedly demands that the US become and stay the world leader in all areas of military power and AI capabilities. Warner's only mention of the world outside the US is of China, portrayed as its main and dangerous adversary.

It's not actually the Chinese that won't control AI development, it's the US. The proposed explosion in the US military budget is just the latest chapter in US leaders deciding to make the next expensive leap into cutting-edge capability.

Look how much the US spent developing the atom bomb? Now how much is the US going to spend to be “first” in AI? And at what cost to all of humanity?

Kitty Bryant, Fort Valley, VA, US

The bankers who promote these ‘drive’ valuations

The Lex headline “Anthropic at \$2tn isn't far-fetched” (September 21) is belied by the article that follows.

These valuations are promoted by investment banks that are heavily incentivised to conflict the highest possible issue price. The logic that is apparently not “far-fetched” is that this company will, in the near future and by itself, transform the global economy, in a way that has not happened in human history and that the company captures the overwhelming majority of the value created. With no competition. In perpetuity. Inevitably.

The investment banks promoting this drive are laughing at you. You may be unconcerned by that. You should be concerned that this is not victimless. Pensioners and savers around the world will, often unknowingly, discover that they have invested in these companies at these indefensible valuations, richly rewarding the bankers that have promoted them. The losses the public will suffer will not be enough to wipe the smile off the bankers' faces, but I do not believe Lex should be so blasé.

Max Thowless-Reeves, Pradswell, Staffordshire, UK

Why newspapers are hard to find in public libraries

Cost isn't the only reason behind the disappearance of print newspapers from public libraries (Letters, September 23). Some members of staff like to read them – while on duty.

Alex May, Manchester, UK

Anglophone robot fear is a Frankenstein inheritance

Gillian Tett (“America must learn AI lessons from Astro Boy”, Opinion, FT Weekend, September 5) traces Americans' fear of AI, data centres included, to a Judeo-Christian theology in which only humans have souls. Tett misstates the doctrine.

Genesis 1:24 recounts earth bringing forth “a living soul”, the same words, in Hebrew and Greek, that Genesis 2:7 uses for Adam. William Tyndale's Bible, the first English translation taken directly from the original Greek and Hebrew texts, splits them: “soul” for Adam and “creature” for beasts.

English translators since have kept a distinction scripture never makes. What sets man apart is not that he alone has a soul but that he alone is called to share the life of God. The early church Fathers called it *theosis*: becoming god by grace. The calling can be refused. Jack, our monastery's dog, is good, not because I love him (though I do), but because God said so (Genesis 1:25).

Osamu Tezuka knew this; Astro Boy is built by a grieving scientist father to replace a dead child, and it does not work.

This also teaches what a data centre is: good matter, put to use, owed neither fear nor worship and not a human face. Tett writes that “Japan's Shinto culture presents life as a spectrum, where objects like rocks can house spirits”. Christianity does not need spirits in rocks; the rock is already good. No Christian has ever feared one.

Anglophone robot fear is a secular inheritance from Frankenstein and the cold war. It has nothing to do with Christianity. What is worth fearing is not a machine that has no soul, but a man who forgets what his own soul is for. Father Andrew (Bushell) Prokes, St Paul's Foundation, Marblehead, MA, US

Smart glasses: let's regulate now, and ask questions later

The last few years have seen the introduction of an increasing number of technologies that have ultimately had to be regulated because of entirely predictable adverse impacts. Social media, e-bikes and cryptocurrency spring immediately to mind. In each case regulation has been made more difficult because it has had to be imposed on a large existing user base. We are now on the verge of another such invention – smart glasses – and are seeing more and more articles warning of the privacy and other issues that will inevitably result. Just for once, could we get ahead of the game and introduce in advance regulations with which they must comply?

Robin Cooke-Hurle, London SW11, UK

Opinion

Space: the final frontline

TECHNOLOGY

John Thornhill



A new space race is under way. But this time the race is not about exploring or commercialising the final frontier but weaponising it.

This month, the US became the first country to admit to deploying weapons in space. "On-orbit space control weapons" had already been deployed to defend against hostile adversaries, Troy Meink, Air Force secretary, announced.

The US did not identify the weapons. But military experts have speculated they might include lasers or high-powered microwave systems designed to jam satellites' electronics. They could even include attack satellites that use grappling robotic arms to disable an enemy's spacecraft or knock it off orbit.

China quickly denounced the US

move, saying it opposed any "space arms race". Russia also said space must remain free of any weapons. But, just like the US, both countries have for decades been surreptitiously testing counterspace measures to degrade or destroy their rivals' space assets. Washington's relative openness should be welcomed.

As far back as 2007, China demonstrated its offensive capabilities in space by blowing up one of its own ageing weather satellites using a ground-based missile. An FT report earlier this year also described Beijing's expanding counterspace programme. Meanwhile, western officials have accused Russia of using space-based systems to trigger GPS navigation outages across Europe on scores of occasions since 2019.

This militarisation of space is another depressing example of the fraying of our fragile web of international governance. The Outer Space Treaty of 1967, negotiated at the height of the cold war, was a remarkable achievement. Now backed by 118 countries, the treaty enshrines the principles that space should remain a common domain for all humanity and

bans the deployment of any orbiting weapons of mass destruction.

But in another respect, the admission of US capabilities may simply reflect current geopolitical realities as so many countries and companies jostle for strategic and commercial advantage in space. The US-Soviet state duopoly of space ended long ago. More than 80 countries now operate satellites with a

The ways in which satellites often combine both civilian and military uses blurs the lines

total of 18,000 currently orbiting Earth. Elon Musk's Starlink satellite service accounts for more than half.

The latest US announcement will not come as a surprise to readers of the 371-page Global Counterspace Capabilities Report published earlier this year by the non-profit Secure World Foundation. The report records how successive US administrations have regarded space as

a warfighting domain since the 1960s. But up until now space skirmishing has been confined to non-kinetic attempts to jam, spoof or hack rivals' satellites.

Although they may not contravene the Outer Space Treaty, the danger of such attacks is that they are often invisible and usually deniable. The ways in which satellites often combine both civilian and military uses also blur the lines. In Russia's eyes, Starlink is a lawful military target given its widespread use by Ukraine, for example. That opacity could lead to fatal miscalculation in the event of any escalation of conflict. "The more you invest in space the more incentive you have for it to be a stable and principled domain," argues Victoria Samson, co-editor of the SWF report.

Still more worrying, however, would be if any country started blowing up rivals' satellites. US strategists are particularly concerned by reports that Russia has been considering the use of nuclear weapons in space. This space-based threat has been one factor in Washington pressing ahead with its staggering expensive missile shield, known as the Golden Dome. Any use of

physically destructive space weapons could result in massive collateral damage, harming foe and friend alike. The nightmare scenario is that cascading space debris could make it impossible to operate any satellites in low Earth orbit for generations, a phenomenon known as the Kessler Syndrome.

Bluffing has always been central to military strategy. But today greater transparency might help prevent ricocheting mistakes. The history of the cold war is instructive, suggests Clayton Swope of the Center for Strategic and International Studies. Despite their latent hostility, the US and Soviet Union still concluded nuclear arms control agreements for mutual advantage. "I don't think we should rule that out in space today," Swope says.

After all, deterrence works best when all sides know the others' capabilities and understand the likely consequences of their actions. US President Donald Trump should find time for some frank talk on the subject when Chinese leader Xi Jinping is in Washington this week.

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Beyond the AI abundance delusion

Adair Turner

A I experts hail the potential for super-rapid prosperity growth. Sir Demis Hassabis, founder of DeepMind, foresees "an era of radical abundance, a kind of golden era". Technology investor Marc Andreessen believes "absolutely stratospheric" productivity growth will make worries about inequality irrelevant. Anthropic's economics team reports a median expectation of 8 per cent per annum GDP growth by 2030.

But the astounding technological advance of AI does not mean it necessarily accelerates growth in measured GDP or human welfare, and it is almost certain to exacerbate concerns about inequality.

As societies get richer, an increasing share of economic activity is devoted to zero-sum competition, with gains for some coming at the cost of losses for others. Ever more sophisticated AI-enabled cyber attacks, for example, require ever-increasing cyber defence expenditures with no benefit to end consumers. In legal services, AI will automate some activities but could unleash a dramatic increase in litigation: "agentic flooding" is already overwhelming the British state and legal system with complaints and injunctions generated by AI.

Conversely, AI will deliver huge benefits that come almost for free. Multiple scientific breakthroughs promise accelerated progress in drug discovery, perhaps eventually giving us drugs that ensure 100 years of disease-free life. In the short term, GDP will be swollen by research expenditures, manufacturing

No amount of cheaper entertainment or goods will offset the sense of restricted opportunity

costs and Pharma company profits. But once the drugs are off patent and manufactured in AI-enabled factories, profits, wages and the contribution to GDP will collapse.

At the limit, if anything is made infinitely abundant by AI, its measured economic value becomes infinitely small.

That in no way diminishes the human welfare benefit. But tax revenues to cover interest on accumulated debt are paid from nominal GDP, and AI contributions to human welfare will not mitigate political disputes about who pays for public expenditure.

Great benefits, moreover, will be balanced by AI-induced harms. Setting aside the risk of human extinction, deepfakes and AI-enabled manipulation are driving an explosion of online scams and increasing the threat to adolescent mental health. This harm, like many AI benefits, will be invisible in measured GDP.

As for inequality, AI seems likely to deliver increasing returns to high skill – whether of scientists, business executives or lawyers – but poses a threat to workers of average skill. The optimistic response is that many goods and services will be so cheap that wage stagnation will not matter.

That optimism is misplaced. As societies get richer and technological progress reduces the real cost of many goods and services, individuals devote a rising share of income to buying things inherently in short supply. The most important of these is housing in desirable locations, driving the rises in house price-to-income ratios observed across the world. AI will not increase the abundance of attractive locations for homes.

In a world of ever-increasing intelligence, an essentially weightless and location-independent attribute, it is inevitable that the most physical and location-specific thing of all – land – will increase in relative price.

Concerns about inequality are therefore more likely to increase than decline. No amount of cheaper computer games, entertainment or manufactured goods will offset the sense of restricted opportunity felt by average earners unable to afford housing in London, Paris, Seoul or Shanghai.

AI can both increase human welfare and degrade it. But the balance will be determined by the policy choices societies make. And many of the most important effects – for good or ill – will never show up in GDP.

The writer is an economist and the former chair of the Financial Services Authority

Burnham and Britain are out of easy options

POLITICS

Robert Shrimley



When a prime minister, especially a Labour one, starts telling the country we are "going to have to be honest with ourselves", it is normally time to watch your wallet. Andy Burnham has spent the first weeks of his premiership trying to foster a sense of hope and belief in the country. Now comes the punch.

As he prepares for next week's conference speech and a tough Budget, Burnham is now into the hard realities of the job. Both he and Britain are out of easy choices. But the honesty he demands from the nation is also required of him and his party.

Labour leaders' conference speeches have delivered some moments of drama, soaring rhetoric and political courage. Neil Kinnock turning on the hard-left entrist of the Militant Tendency or Hugh Gaiskell vowing to "fight, fight and fight again" to save his party from unilateralists.

But Burnham's model should be another brand-new leader, chosen mid-term. In 1976 James Callaghan faced a more immediate economic crisis than Burnham does. But the recognisable echo from then is of a

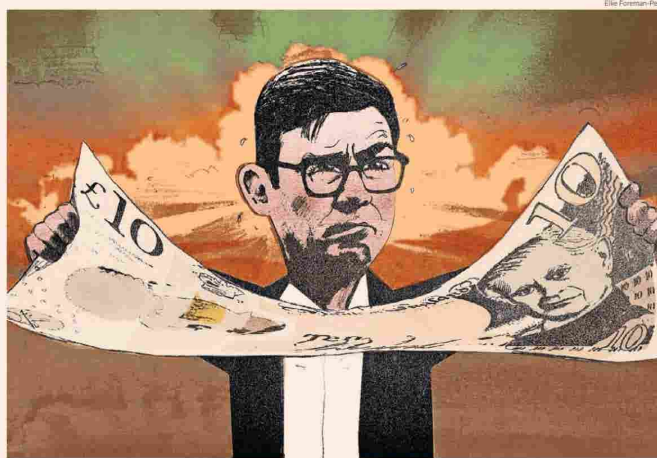
nation that cannot continue as it has.

Braving a surly membership, Callaghan told his party that Britain had "lived far too long on borrowed time, borrowed money and borrowed ideas".

In the most memorable passage, he added: "We used to think you could spend your way out of a recession and increase employment by cutting taxes and boosting government spending. I tell you in all candour that option no longer exists... insofar as it ever did exist." Burnham will not like the Callaghan precedent – he lost the subsequent election. (Callaghan also memorably ignored advice to call an early election.) But it was an example of the honesty Burnham is demanding.

Burnham does have a vision for the country. His plan for a decentralised nation where regions can drive their own growth strategies is serious. But it won't solve the challenges of today, this year or even next year. Those issues are where candour comes in. The government is spending £1 in every £12 servicing its debt interest. Net debt is 94 per cent of GDP and borrowing is still rising. Britain has an ageing population and voters are making more demands on the state than they are willing to pay for. The taxes already raised by Labour have hurt business and undermined competitiveness.

Above all, Britain needs to modernise defence and re-arm in the face of threats from Russia. Vladimir Putin is testing Nato on a near-daily basis. The government at length published a defence investment plan but, in the words of the



former general who co-authored the review on which it is based, the UK is currently going to get there five years too late. This cannot be put off.

So if Burnham and his chancellor, John Healey, are offering honesty next week, their message is we are spending too much for the tax we are raising. The choice is tax more, spend less or both. There is no reason to doubt Burnham's desire to reduce welfare spending, but there are upfront costs, and the time-frame and reality of Labour politics mean tax is the more likely lever.

Healey could find more money. Gambling taxes, changes to capital gains tax, including ending the CGT uplift on estates, which resets to an asset's current market value on the owner's death, and extending the council tax surcharge

to properties worth £1.5m are among the ideas floating around – though CGT rises are unlikely to raise anything close to the amount its champions imagine.

But this is still more salami-slicing, taxing business or hitting investment, which will undermine the long-term ambition of raising levels of growth and investment.

The alternative Callaghan moment would be to tell the party conference to prepare for serious and significant spending cuts, to welfare especially but also other popular programmes. This would be a better course for an over-taxed nation. But there is no reason to believe Burnham can deliver cuts swiftly or that this is the prime minister he wants to be. He has already declared that "national security can't come at the expense of social security". Even on the broadest interpretation of this remark, it reveals his instincts.

In the absence of large cuts, the simplest, most efficient way to fund Britain's defence and ease borrowing is to let aside Labour's manifesto and raise income tax. It spreads the burden, does

the least economic damage and confronts the country with the choices it must make.

This too should be part of the hard truth Burnham is right to say the country needs. It is to tell the voters that the UK is in a defence emergency, that the manifesto has been superseded by world events both economic and military. It would be preferable to find the money for defence via cuts elsewhere, but he doesn't have the time for protracted wrangling with his own party.

The politics of a manifesto breach on tax when cost of living tops the public concern will almost certainly prove too unappealing. Instead, the signals so far are another patchwork Budget, the erosion of fiscal headroom and a gamble that the bond markets ("to which Burnham has been 'in hock'") will settle.

Levelling with the country is necessary. Labour and the UK both need a Callaghan moment. A truly honest conversation starts with a leader ready to face the consequences of their candour.

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Signals so far are another patchwork Budget and a gamble that the bond markets will settle

How Trump's tariff war is clobbering the Hanks of America

TRADE

Alan Beattie



Want to meet a victim of Donald Trump's tariff war? Let me introduce Hank, a figment of my imagination. Hank is a retired machinist from Indiana. He now has a successful business as a sole proprietor importing tabletop war-gaming figures from China, modifying them using his metalworking skills, sending them to Spain's figurine-painting industry, bringing them back and selling them. You might not think of Hank as a hero of globalisation, but he totally is.

Until Trump (for whom Hank voted) came along, Hank's imports from China and then Spain came in under the \$800 "de minimis" exception to tariffs. Since Trump abolished de minimis, his business has been in turmoil.

The unprocessed imports from China now attract tariffs. For the figurines returning from Spain, the tariff will partly depend on whether the product is treated as originating in China after Hank has done his alterations. (Like the fictional Hank, I've done all this without professional customs advice, so tell me if I've got it wrong.) But regardless of whether he's only liable for duties on the value added in Spain or on the whole value of the reimport, Hank must fight his way through the thicket of Customs and Border Protection regulations on "goods for repair or alteration".

He'll have to file a complex declaration signed by himself and the company doing the painting, and pay tariffs on return. If he's unlucky, the goods will be deemed incomplete when they leave the US – whether an unpainted figurine is a finished or unfinished product would seem to be a marginal case – and therefore subject to full tariffs on the way back. Hank might just give up his business altogether. Hank is planning to vote Democrat in November.

Trump removed de minimis on imports from China in May last year and

from all countries in August; other trading powers including the EU have done similar. In recent months the US limit has been made permanent and certified as constitutional by a ruling from the Court of International Trade.

The move was supposed to hit Chinese companies like Temu and Shein, which sold directly to individual US consumers. It's certainly not been great for

The more exporters are swamped by paperwork, the more large companies get an advantage

them: the profits of Temu's parent company dropped sharply. But both have adapted by shifting towards a warehouse model and using Chinese-owned delivery companies in the US. Getting rid of de minimis was intended to clobber Temu, but it's inflicted collateral damage on many thousands of Hanks.

"Sounds good, but what about the paperwork?" is evidently not the kind of

pettifogging woke technocratic objection given much shrift in the Trump administration. The abolition of de minimis has required a new system to be created for small-value parcels. It's intended to simplify the process but still requires declarations of tariff classification, origin and valuation, and creates more work for customs professionals.

The typical effect of tariffs and trade restrictions – indeed regulation in general – is to advantage larger companies with more capacity for compliance. Trade is already heavily dominated by big business, which accounts for around two-thirds of US goods exports by value. Even they are feeling the strain: an industry survey says more than half of large-turnover companies don't feel "trade ready" when it comes to dealing with the bureaucracy.

The more exporters are swamped by successive waves of paperwork, the more that large companies get an advantage. Preferential trade agreements routinely contain chapters on small and medium-sized enterprises – which enable ministers to chatter about allowing nimble minnows to

swim the waters of international commerce and so on – but these are correctly regarded as primarily for show.

Research on the effect of Trump's first-term tariffs on global production networks has added more detail on how companies respond. Chinese exports were routed through third countries, sometimes with some production moving too, and multinationals with flexible affiliate networks did the bulk of the work in rejigging supply chains. Domestic companies couldn't do much more than let the shock hit them.

The Trump administration is now proposing yet another bureaucracy-creating wheeze in the form of increased reporting requirements to stop shippers mislabelling the origin of imports, an attempt to solve a problem it itself created. Experts are sceptical it will ever happen, given how overloaded the administrative system already is. Whether it does or not, one thing is clear: any time one of these initiatives is created, it favours the multinationals over the Hanks.

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