



## Bad fences

Marco Rubio's visit was an opportunity to mend economic and energy ties

Secretary of State Marco Rubio's four-day visit to India, his first since taking office in January 2025, was understood to have been aimed at smoothing bilateral ties that have been deeply ruptured over the past year. The problems have been multifold, ranging from the U.S.'s high tariffs and cutting down on visas, immigration and outsourcing; to sanctions on India's energy procurement and investment, its moves with China and Pakistan, and the pejorative remarks by President Donald Trump and his cabinet colleagues about India. Although the Modi government has not criticised the U.S. for its actions, there is no doubt that the U.S. attack on Iran on February 28, the wider regional conflict and the Hormuz Strait blockade, have caused immense economic worries for India as well. It was thus hoped that Mr. Rubio's visit, which combined the bilateral agenda alongside the Quad Foreign Ministers' meeting, would help repair one of the worst phases in bilateral ties caused largely by Washington's unilateral moves. Mr. Rubio consistently held that the relationship was well and that "President Trump loves India", while responding to repeated questions on Mr. Trump's post that amplified anti-immigrant sentiments referring to India as a "hell-hole". New Delhi had no doubt laid out the red carpet for Mr. Rubio. In a departure from protocol, Prime Minister Narendra Modi welcomed him on his arrival and External Affairs Minister S. Jaishankar spent much of the weekend in meetings with Mr. Rubio, including two U.S. Embassy receptions. On Sunday, Mr. Jaishankar attended a celebration marking the U.S.'s 250th Independence Day and Mr. Rubio's birthday. Mr. Rubio visited the Missionaries of Charity, in Kolkata, and went to Agra and Jaipur for sightseeing. In bilateral talks, the Foreign Ministers discussed the full gamut of ties, including trade, energy, civil nuclear technological and defence cooperation, as well as the regional and geopolitical conflicts.

However, apart from one agreement on critical minerals cooperation, which replicates their partnership within the Quad and the 15-nation Pax Silica, the visit's bilateral part ended with few outcomes of note. Mr. Rubio's refusal to acknowledge a problem in the relationship indicates that the U.S., once considered India's most trusted partnership, has failed to recognise New Delhi's concerns. It is hoped, however, that Mr. Rubio was informed of them, as both sides prepare for a possible Modi-Trump meeting at the G7 Summit in Evian, France, in mid-June, where India is a special invitee. This will be the first time that the leaders have come face to face since Mr. Modi's February 2025 Washington visit and all that followed, and an opportunity to mend the relationship especially in the areas it has frayed the most — economic, energy and regional security.

## Score board

The CBSE was ill-prepared for the examination reforms it undertook

India's education system is under severe stress. The NEET reforms which caused immense suffering to nearly 22 lakh students exposed the deep structural flaws within the National Testing Agency, where one part conducts the JEE seamlessly while another appears clueless and completely out of its depth in conducting another high-stakes examination. The Central Board of Secondary Education (CBSE) has caused much anxiety to and harmed a significant proportion of some 18 lakh students who took the Class 12 exams this year and whose answer scripts were evaluated through On Screen Marking (OSM) for the first time. It appears that little training was given to the staff scanning the answer sheets, and that no SOPs were in place after consultations with experts. Yet, some one crore sets of answer papers were scanned in record time. Evaluators were not really put through the paces; not prepped fully for the new interface; nor their screen fatigue evaluated for its impact on scoring. Ideally, OSM should first be tested on a smaller subset of answer sheets in parallel with the regular mode to evaluate whether there is any statistically significant deviation in scores between the two methods. This would have borne out whether the system was truly prepared for what was presented as a reform and allowed corrective measures before full-scale adoption.

It appears none of this was done. The result: a clear reduction in student performance, which was too significant to be dismissed as coincidence. When students received their scanned answer sheets, their fears appeared to have been validated. Widespread reports of mismatched scripts, unevaluated supplementary sheets, and unclear scans flooded social media, while many students complained that they had not received their scanned copies. To tamp down anger, the CBSE had slashed the fees for accessing answer scripts and re-evaluation while promising refunds where re-evaluation was found to be justified. More than 1.25 lakh students applied for accessing nearly four lakh answer scripts within a few hours of the window opening. Since then, the deadline for script access was extended repeatedly before ending on May 25. The CBSE has not yet revealed the plans for re-evaluation which is likely to be of higher order this year. The Education Minister has said that the IITs have now been involved in troubleshooting. What is at stake is not just the CBSE's credibility but also the future of lakhs of students. The immediate task before the CBSE is to carry out the re-evaluation to the satisfaction of students. A long-term task would be to honestly address the root causes of the fiasco and implement solutions.

The Strait of Hormuz is no longer just a geopolitical flashpoint; it has become the fault line of the global energy economy. As tensions in West Asia continue to disrupt shipping through one of the world's most critical maritime corridors, countries across the globe are confronting a harsh reality: energy security is now inseparable from geopolitics. For India, which depends on imports for the overwhelming majority of its crude oil needs, the crisis has exposed both the strength of recent policy interventions and the limits of shielding consumers indefinitely from market realities.

The immediate impact of the conflict has been visible in global crude markets. Brent prices have surged sharply amid fears of prolonged disruption to Gulf supplies, while freight costs and marine insurance premiums have climbed to multi-year highs. Shipping routes are being diverted around the Cape of Good Hope, extending delivery timelines by weeks and significantly increasing transportation expenses. Global gas markets, too, remain under pressure following disruptions linked to the shutdown of key liquefied natural gas export infrastructure in Qatar. Despite this turbulence, the crisis has not hit Indian consumers as ferociously as it should be so far. Petrol and diesel prices at Indian fuel pumps have remained relatively stable, hovering near ₹95 per litre in many cities, even as fuel prices in several advanced economies rose steeply, by about 25% on average. Petrol prices in Germany and the United Kingdom have crossed the equivalent of roughly ₹220 and ₹204 per litre, respectively, while Hong Kong continues to record some of the world's highest fuel prices at nearly ₹291 per litre. This stability is not a coincidence. It has been achieved through an extraordinary combination of state intervention, supply diversification, and financial absorption by public sector oil companies.

### Interventions that come at a steep cost

Over the past few years, India has quietly built a more resilient energy architecture. The country expanded its sourcing basket beyond the Gulf, increased strategic reserves, and strengthened ties with suppliers in Russia, the United States, West Africa, and the Atlantic basin. Union Petroleum Minister Hardeep Singh Puri recently announced that India's crude supply position remains secure despite disruptions around the Strait of Hormuz, pointing to the country's growing ability to source oil from non-Gulf origins and maintain refinery throughput at high levels.

Taking advantage of the exit of the United Arab Emirates (UAE) from the Organization of the Petroleum Exporting Countries, India signed an agreement with the UAE to store 30 million barrels of crude oil in India's Strategic Petroleum Reserve. The government's response since the latest



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escalation has been swift. Refineries were directed to maximise LPG production to meet rising domestic demand, especially given the dramatic expansion of cooking gas access under the Ujjwala scheme. LPG connections in India have risen from roughly 14.5 crore in 2014 to more than 33 crore today, fundamentally transforming household energy consumption patterns. Gas allocation was prioritised for households, public transport networks, and fertilizer plants to avoid cascading disruptions across essential sectors. Domestic LPG production was reportedly increased by nearly 50% during the peak of the crisis response, while all 25 fertilizer plants continued receiving around 70% of their gas requirements to maintain agricultural supply chains. Naval deployments in the Gulf of Oman, diplomatic engagement with multiple countries, and efforts to secure alternative shipping arrangements underline how seriously India has treated the crisis. These measures have bought the country valuable time. But they have also come at a steep cost.

### Pressures on oil firms

India's state-run Oil Marketing Companies (OMC) are now operating under enormous financial stress, selling fuel below market-linked costs in order to protect consumers from inflationary shocks. Mr. Puri recently indicated that under-recoveries could rise sharply if elevated crude prices persist, with some estimates placing daily losses near ₹700 crore-₹800 crore during peak volatility. The government has already reduced excise duties and imposed temporary export restrictions on refined fuels to retain supplies within the domestic market.

This strategy may be politically prudent in the short term, but is economically difficult to sustain over a prolonged period. Energy subsidies of this scale eventually strain public finances, weaken the balance sheets of oil companies, and distort market signals that encourage efficient energy consumption.

The larger challenge is that India's vulnerability is structural, not temporary. Nearly every major sector of the economy — transport, logistics, aviation, manufacturing, agriculture, and fertilizers — remains heavily dependent on imported fossil fuels. Even if India succeeds in avoiding immediate shortages, it cannot remain permanently insulated from a prolonged global energy shock.

There are already signs that the government recognises this reality. Prime Minister Narendra Modi's appeals for responsible energy use — including reducing unnecessary travel, conserving fuel, and encouraging remote work where feasible — reflect an administration preparing the public for a period of prolonged uncertainty. Such messaging would have seemed extraordinary only a few years ago. Today, it

The petrol products price hike is too little and too late

# Rajya Sabha defections, constitutional questions



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The recent developments within the Aam Aadmi Party (AAP), appear to have dealt a decisive blow to its representation in the Rajya Sabha. On April 24, 2026, seven out of its 10 sitting Members of Parliament, publicly announced that over two-thirds of the party's MPs had decided to merge with the Bharatiya Janata Party (BJP), invoking the provisions of the 10th Schedule of the Constitution.

While the development has attracted widespread political attention, its implications extend beyond immediate partisan concerns. It raises significant constitutional questions regarding the interpretation of the anti-defection law, particularly the scope of the "merger" exception under the 10th Schedule. Nor is this episode entirely unprecedented. Similar assertions of legislative strength have been witnessed at the State level, most notably in the case of the Eknath Shinde-led faction in the Shiv Sena within the Maharashtra Assembly. However, the present instance assumes greater significance as it unfolds at the national level, involving MPs in the Rajya Sabha, thereby amplifying its constitutional and political consequences.

### Anti-defection framework, 'split' doctrine

The Constitution, as originally adopted in 1950, provided for disqualification of MPs on limited grounds under Article 103, to be decided by the President of India acting on the opinion of the Election Commission of India. The 10th Schedule, introduced by the 52nd Constitution Amendment Act, 1985, expanded this framework to address the persistent problem of political defections adding another ground for disqualification of members to be decided by the Speaker or Chairman. The objective was to curb the practice of elected representatives abandoning their parties for political gain, by attaching the consequence of disqualification.

At the same time, the Schedule originally carved out two exceptions, "split" under Paragraph 3 and "merger" under Paragraph 4. The first, which recognised a split in a legislature party where one-third of its members formed a

separate faction, was subsequently deleted by the 91st Constitution Amendment Act, 2003, following recommendations of Electoral Reforms (Dinesh Goswami Committee) in May 1990 and the 170th Law Commission Report, 1999. This deletion marked a conscious shift away from recognising internal fractures within legislature parties as a legitimate defence to defection.

The omission of Paragraph 3 carries deeper implications. The concept of "split" had implicitly recognised a degree of autonomy in the legislature party vis-à-vis the political party. Its removal signals Parliament's clear intent to restore primacy to the political party as the central unit of democratic accountability.

The Supreme Court of India has also reinforced this position in Subhash Desai vs Principal Secretary, Governor of Maharashtra (2023), where a Constitution Bench declined to interpret the 10th Schedule in a manner that severs the figurative umbilical cord between a legislature party and its parent political party. The Court underscored that the political party continues to guide and control the actions of its elected members, even after electoral victory.

### The merger exception in question

The present controversy centres on the interpretation of Paragraph 4 of the 10th Schedule, which provides immunity from disqualification in cases of merger. The key question is whether such a merger can be effected solely by two-thirds of the members of a legislature party, or whether it must necessarily be preceded by, or reflect, a decision of the original political party itself.

A plain reading of Paragraph 4 suggests that the exemption applies where the "original political party" merges with another political party. The emphasis, therefore, is on the merger of the political party, not merely a numerical alignment within the legislature party. Hence, Paragraph 4(2), which introduces a deeming fiction based on the consent of two-thirds of legislators, cannot be read in isolation so as to displace the primacy of the political organisation.

appears pragmatic. There is a strong argument for calibrated correction. India has managed inflation relatively effectively over the past decade compared to many major economies, creating some room for a measured increase in petroleum prices without triggering runaway inflation. Consumer Price Index inflation remained comparatively moderate in early 2026 — at around 3.2% to 3.5% through the first four months of the year — suggesting that limited price rationalisation may still be economically manageable. A gradual pass-through of global energy costs would reduce the fiscal burden on the state, stabilise oil marketing companies, and encourage more responsible consumption patterns.

For now, India has demonstrated remarkable agility in navigating one of the most serious energy disruptions in modern history. Supplies remain stable, panic has been avoided, and the government has managed to shield ordinary citizens from the worst immediate consequences.

### The realities of a new energy era

But energy shocks of this scale eventually demand economic realism. The true cost of fuel cannot be deferred forever. India's challenge is no longer merely surviving the crisis; it is preparing the public and the economy for a world in which energy security will remain fragile, contested, and deeply political for years to come.

Recent reports suggest that Indian refiners continue to diversify sourcing aggressively even as global analysts warn that a prolonged Hormuz disruption could widen India's fiscal deficit and weaken the rupee. That should serve as a reminder that the situation is not a temporary headline cycle. It marks the beginning of a new energy era — one in which resilience, diversification, and conservation will matter as much as diplomacy itself. The government has raised petroleum product prices several times, cumulatively by about 7%. Yet, this piecemeal approach neither matches international crude oil prices adequately nor meaningfully reduces the burden on OMCs. Reports suggest that OMCs continue to incur losses of ₹700 crore to ₹800 crore a day, and that only an additional 13% hike, beyond the existing 7%, would eliminate these losses. It has also been reported that the government has returned to adjusting fuel prices in line with fluctuations in international crude oil prices. However, frequent revisions create uncertainty for consumers trying to manage household and business budgets. Instead of incremental increases, the government should implement a one-time price hike of at least 13% on petroleum products, including petrol, diesel, and aviation turbine fuel. Such a move, though difficult, would reduce uncertainty, stabilise OMC finances, and allow prices to remain steady until there is a significant shift in global crude prices.

To do so would invert the constitutional design, effectively allowing the legislature party to dictate the fate of the political party.

This interpretation would be inconsistent with Parliament's decision in exercise of constituent power to abolish the "split" exception, which had earlier permitted even a one-third faction to claim legitimacy. The threshold may have changed, but the principle remains that the internal dissent within the legislature party cannot override the identity and continuity of the political party.

### Beyond technicalities

At a broader level, the anti-defection law was not merely intended to regulate individual conduct but to preserve the integrity of the party system and, by extension, the institution of 'opposition' in democracy. While it does not entirely prohibit political realignments, it subjects them to constitutional discipline.

The recent AAP episode underscores the need for judicial clarity on whether legislative majorities can, in effect, appropriate the identity of the political party they were elected to represent. The answer will have far-reaching implications for parliamentary democracy.

As lyricist and former parliamentarian Javed Akhtar once observed in the Rajya Sabha, the essential distinction between democracy and dictatorship lies in the presence of an opposition. It is this opposition that the 10th Schedule seeks to safeguard. AAP has approached the Chairman of the Rajya Sabha under Paragraph 6 of the 10th Schedule to challenge the action of its seven "merged" MPs.

How the merger exception is ultimately interpreted will be significant, particularly for the continued vitality of the Opposition. In the absence of settled judicial clarity, the issue is likely, sooner rather than later, to invite authoritative determination by the Supreme Court. The hope, ultimately, is that constitutional adjudication will preserve the centrality of political parties within India's parliamentary framework.

## LETTERS TO THE EDITOR

### Destroying merit system

The Supreme Court of India has rightly observed that the National Testing Agency (NTA) "has not learnt its lesson" even after the 2024 controversy (Front page, May 26). Repeated leaks and examination failures are

destroying students' trust in merit and fairness. Lakhs of hardworking youngsters now feel let down by the very system that is meant to reward talent. Such frustration is creating public anger, political cynicism, and even the rise of terms such as the "Cockroach

Janta Party" to mock a system seen as surviving despite repeated scandals. Many students are also choosing foreign universities and migration over staying in India. If examination bodies lose credibility, the nation risks losing an entire generation's

confidence in institutions. Therefore, transparency, accountability, and strict reforms in bodies such as the NTA are urgently needed. **Sam Oommen,** Vemmony, Chengannur, Kerala  
It is unfortunate that the

NTA has been unable to develop a foolproof system to safeguard question papers and prevent leaks. The lapse on the part of the NTA is indefensible, as the future of lakhs of students across the country stands compromised. Even more galling is the

recurrence of such leaks — a sign of a chronic malaise hardly befitting an institution of the NTA's stature. **C.V. Aravind,** Bengaluru  
Letters emailed to letters@thehindu.co.in must carry the postal address.

# The absolute necessity of female friendships

An enduring fiction about female friendship is that it is a leisure activity, an indulgence that exists on the margins of real life. For adult Indian women, this real life is imagined as marriage, children, domestic work and caregiving, and in some cases, paid work too (and in rarer cases, perhaps even a career). If one does not understand how female friendship can be a lifeline, it is easy to dismiss the time spent sustaining it as wasteful.

To appreciate the significance of female friendship, one must first understand the profound social isolation that defines the lives of countless Indian women.

Aside from writing fiction, the author of this article builds human-centred technology products at a nonprofit working in maternal and child health. A lot of time in this line of work is spent talking to and learning about diverse women from different parts of the country in order to understand how they access information, make decisions and exercise agency, especially around health and nutrition. Through such conversations and research, the author realised how difficult it was for Indian women to maintain friendships after marriage, and as a consequence, how uncommon it is for married women to have close friends.

### Documented gap

According to a Gallup poll from 2004 (incidentally, the same year the popular sitcom *Friends* aired its last season), the average American woman had eight close friends.

In contrast, more recent studies by the World Bank show that rural women in Uttar Pradesh, Odisha and Uttarakhand have between one and three close social connections outside the family. In many ways, this is not surprising; in most parts of the country, women move homes – sometimes even towns and States – after marriage, and while more women than ever before now own



**Amrita Mahale**

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smartphones, there are gatekeepers who supervise and dictate their use of technology. Even if they were to reside in the same village or town, it is not much easier for women to keep in touch with a friend.

According to the most recent National Family Health Survey (NFHS-5), only 42% of Indian women are allowed to travel alone outside the home, even to the market or to access health facilities. Additionally, over 10% of married women reported not being allowed to meet female friends.

### Method of isolation

This social isolation of young women is neither an accident, nor simply an unfortunate by-product of social norms. Limiting women's access to information and values which can challenge the status quo preserves patriarchal control over them.

A 2021 study from Uttar Pradesh showed that the number of peers a married woman has (or perhaps it is more appropriate to say, is 'allowed to have') shrinks when her mother-in-law does not approve of family planning or if the mother-in-law wants her to have more children, specifically more sons, than the younger woman herself would prefer to have. By restricting a young wife's ability to form friendships and consult with peers, the family can ensure that the preferences of the husband and the in-laws prevail, especially in critical decisions around fertility and family planning.

While this may seem far removed from our own lives and contexts, modern urban living introduces its own barriers to connection: the twin crises of time and space. Women across classes shoulder the double burden of professional and domestic work. Compared to their rural counterparts, urban women face another key disadvantage: nuclear family units leave women without the built-in "village" of female kin that can provide a buffer against

domestic stress. Friendship is one of the first casualties of this time-poverty.

Sociologist Ray Oldenburg coined the term "third places" for spaces of social gathering distinct from home and work. He argued that community and democracy thrive in third places; and friendships do, too. For many urban women today, safe, non-commercial spaces to congregate are vanishing.

### A potential lifeline

Ironically, the ascent of friendship as unimportant hurts men just as deeply. We are currently witnessing a silent epidemic of male loneliness, where men, conditioned to prioritise stoicism and side-by-side activities over face-to-face connection and vulnerability, often reach middle age with no emotional support system outside of their marriage.

If men were to value friendship with the same intensity that women do, if they were to view it as an essential nutrient for a fulfilling life rather than a mere garnish, they might find themselves not only healthier, but less threatened by the women who have known this secret all along.

Female friendship can be an emotional, social and political lifeline for women. Our friends show us different ways of being in the world. They teach us how to take up space, how to challenge power and bargain with it. Perhaps this is what society fears. We often imagine the fight for women's empowerment as a public spectacle, as marches, protests, and activism, but this fight can take a very different form as well.

For many women in this country, sustaining and safeguarding female friendship – be it in the form of a catch-up on the phone, an exchange of messages on WhatsApp, or a walk around the neighbourhood late in the evening – is no less than an act of resistance.

# A new brand of politics in Tamil Nadu

Though a novice, CM Vijay shows signs of being a shrewd political strategist

### STATE OF PLAY

**B. Kolappan**

It appears that the Tamil Nadu Vetri Kazhagam (TVK), led by actor-turned-politician C. Joseph Vijay, has triggered a political upheaval in Tamil Nadu following the 2026 Assembly elections. In many ways, Mr. Vijay has demonstrated that a Chief Ministerial candidate need not necessarily hail from a numerically dominant community, backed by entrenched political networks to capture power in Tamil Nadu. Equally significant is the fact that he has become the first Christian Chief Minister to head a coalition government in the State's history.

The ascent of the TVK to power in Tamil Nadu has posed a formidable challenge to the two principal Dravidian parties, the Dravida Munnetra Kazhagam (DMK) and the All India Anna Dravida Munnetra Kazhagam (AIADMK), which have alternated in power in the State for more than half a century. Tamil Nadu politics appears to have evolved into a contest between the charisma and mass appeal of Mr. Vijay – carefully cultivated through cinema and popular culture – and the leaders of the two Dravidian majors, who continue to invoke and defend the Dravidian legacy whenever they perceive a political threat.

### Breaking from tradition

Mr. Vijay heads a remarkably young government. Barring senior figures such as K. A. Sengottaiyan and N. Anand, most Ministers and MLAs are relatively young and possess little to no independent political capital. Moreover, the traditional white dhoti emblazoned with party colours on its border no longer defines



the political culture of the TVK. The Chief Minister is often seen in sharply tailored formal suits, while many of his MLAs appear in white shirts and black trousers, projecting the image of a new political generation eager to break from convention. In several constituencies, voters scarcely know the names of their MLAs; instead, it was the 'whistle' symbol of the party, the charisma of Mr. Vijay, and the electorate's yearning for political change that shaped the electoral verdict.

The composition of the Cabinet also marks a striking departure from previous regimes. It includes eight Ministers from the Scheduled Caste (SC) community, among them Vanni Arasu of the Viduthala Chiruthaigal Katchi (VCK) and P. Viswanathan from the Congress. The Ministry also features four women entrusted with major portfolios. Traditionally, departments such as Industries, Animal Husbandry and Dairy Development were regarded as male bastions. Under the TVK government, however, these influential portfolios are being handled by women Ministers, signalling a conscious attempt to redefine the contours of political representation in Tamil Nadu.

The manner in which Mr. Vijay, despite securing only 108 seats, managed to garner support for his government of a

shrewd political strategist. After the Congress volunteered its support, he reached out to the leaders of the two Communist parties, the VCK and the Indian Union Muslim League. He personally engaged with their leadership, offered Cabinet berths, and won over a section of AIADMK legislators, who voted in favour of his government during the trust vote in the Assembly.

### All's fair in politics

Meanwhile, the TVK appears to be steadily moving towards securing a legislative majority of its own. Mr. Vijay and his lieutenants seem to have embraced the principle that, in politics, expediency often matters more than ideology or principles. Capitalising on the growing dissent within the AIADMK, the TVK has successfully drawn dissident legislators into its fold. So far, four AIADMK MLAs have resigned their Assembly seats and joined the TVK. The apparent strategy is either to field them as TVK candidates in the ensuing by-elections or to replace them with TVK nominees.

The question of disqualification of the party whip is now pending before the Speaker. Should the Speaker move ahead with disqualification proceedings, several vacancies could arise in the Assembly. The TVK appears confident that it can win enough seats in the subsequent by-elections to secure a clear majority, thereby freeing itself from dependence on outside support.

Though a political novice, Mr. Vijay seems to have quickly learnt that power often rewards those willing to pursue victory through strategic calculation and relentless manoeuvring.

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Female friendship can be an emotional, social and political lifeline for women. Our friends show us different ways of being in the world

# NCDs accounted for 60% of all deaths in 2022-2024

Non-communicable diseases are increasingly becoming the major cause of death even among women and the rural population

### DATA POINT

**Bindu Shajan Perappadan**

India's youth mortality profile is shifting with Non-Communicable Diseases (NCDs) being the cause of 60% of all deaths in the 2022-2024 reporting period, according to the Sample Registration System (SRS) Statistical Report 2024, released this month. This was an increase of 7.3 percentage points compared with the 2015-2017 reporting period, when NCDs were the cause of 52.8% of all deaths (Chart 1).

Analysis showed that among the NCDs, cardiovascular diseases alone accounted for 32.1% of all deaths in 2022-2024, which is again an increase of five percentage points compared with 27.1% in 2015-2017. The combined share of communicable diseases, and maternal, perinatal and nutritional conditions as the major cause of death in India has meanwhile come down from 22% in the 2015-2017 period to 19.7% in 2022-2024.

Age-group-wise data presented in the Cause of Deaths in India: 2022-2024 report showed that while cardiovascular diseases accounted for 32.1% of all deaths caused by NCDs, they accounted for 19% of deaths in this age group, compared with 16.3% in 2015-2017. The rise in suicides points to growing mental health pressures, including unemployment, academic stress, financial difficulties, and social isolation.

The report also showed stark differences between the group of eight States – Bihar, Jharkhand, Madhya Pradesh, Chhattisgarh, Odisha, Rajasthan, Uttar Pradesh and Uttarakhand – which were identified for special focus for the Government under its Empowered Action Group (EAG) along with Assam and other States (Chart 3). In EAG States and Assam, NCDs accounted for 53.9% of all deaths compared with 63.5% for other States.

Analysis of the data over the years showed notable differences between the rural and urban population and between men and women. NCDs were the cause of 64.8% of all deaths in urban areas while they accounted for only 58.8% of all deaths in rural areas. Similarly, NCDs accounted for 62.3% of all deaths among men and 56.9% among women. However, the trend of NCDs becoming the major cause of death is clearly visible even among the rural population and women (Chart 2).

After cardiovascular diseases, the top causes of death in the 2022-2024 reporting period included cancer and other neoplasms, respiratory diseases, digestive diseases and respiratory infections, each accounting for more than 5% of all deaths (Table 1).

The report suggests that India is now experiencing an epidemiological transition similar to that seen in many middle- and high-income countries, where chronic illnesses dominate mortality trends. At the same time, infectious diseases continue to remain a challenge, creating what public health experts describe as a "double burden" of disease.

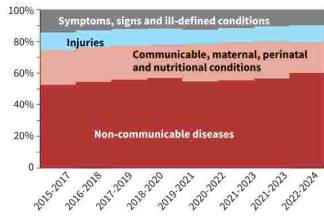
Suicide remains the leading cause of death among the 15-29 age group (Table 1). Suicides accounted for 19% of deaths in this age group, compared with 16.3% in 2015-2017. The rise in suicides points to growing mental health pressures, including unemployment, academic stress, financial difficulties, and social isolation.

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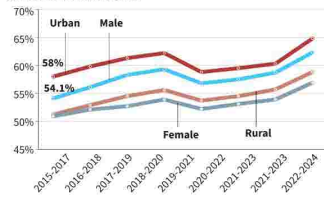
## Cause for concern

The data for the charts were sourced from Sample Registration System – Statistical Reports and Causes of Deaths in India Reports. In the charts, EAG refers to empowered action group

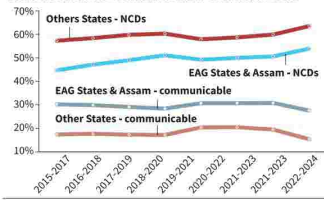
**CHART 1:** Major causes for deaths in India over reporting periods from 2015-2017 onwards



**CHART 2:** Share of deaths due to NCDs between rural and urban areas and men and women



**CHART 3:** Share of deaths due to NCDs and communicable diseases between EAG States and Assam versus other States



**TABLE 1:** Top 10 causes of deaths among all age groups, and in the 15-29 and 30-69 age groups in India

Cause	All ages (%)	Age 15-29 (%)	Age 30-69 (%)
Cardiovascular diseases	32.1	10.8	37.3
Cancer	7	4.2	10.3
Digestive diseases	5.9	7.5	8.9
Respiratory diseases	6	-	5.1
Respiratory infections	5.7	-	-
Diabetes mellitus	3.6	-	3.9
Genito-urinary diseases	3.4	-	4.7
Fever of unknown origin	4.1	3.3	-
Road accidents	-	17.7	4.2
Other unintentional injuries	4.1	8.6	3.9
Suicide	-	19	3.4
Tuberculosis	-	3.1	3.5
Neuro-psychiatric conditions	-	3	-
Ill-defined / other symptoms	9.7	3.2	-

The table above shows the top 10 causes of deaths among age categories. The blanks indicate that these causes were not among the top 10 causes for the corresponding age group

As shown in the table above, road accidents and suicides disproportionately affect younger people. Deaths caused by motor vehicle accidents increased from 2.9% to 3.2%, while suicides rose from 2.5% to 2.8% in the latest report

In Chart 1, the increase in deaths due to communicable diseases during 2019-2021 and 2020-2022 was due to COVID-19

### FROM THE ARCHIVES

## The Hindu

FIFTY YEARS AGO MAY 27, 1976

### No let-up in campaign against coloured in UK

London, May 26: The campaign against the coloured in Britain goes on unabated and if the present trend continues, with right-wing reactionaries making the most of it an explosive situation may develop soon.

The coloured community has been stunned into a kind of silence, a silence born of fear. Thousands of Asian families here are seriously considering going back home provided economic circumstances permit.

But, with the exception of a tiny minority, most Asian families lead a hand-to-mouth existence. Some live comfortably but save little and a lot of them are exploited by British employers as a source of cheap, disciplined labour. They know that white workers in many menial jobs would tend to be callous and "outright lazy" in the words of a white garment factory owner I spoke to the other day.

The recent developments raise many questions about Britain's claim to be a non-racist liberal society. The British media, which are supposed to maintain "high moral standards" and which regard themselves as custodians of the moral and intellectual values of the world, continue to hammer at the race issue in such a way that public opinion is getting highly prejudiced against the coloured.

The Labour government is right now fighting a battle of words with Tory right-wing leaders about the number of dependents of coloured British who want to migrate here.

A HUNDRED YEARS AGO MAY 27, 1926

### Laying of new trans-atlantic cable

Rugby, May 27: The shore end of the greatest submarine cable in the world is to be landed at Land's End to-day provided weather conditions are favourable. Three miles of cable have already been laid seaward and is marked by a buoy ready for the time when the cable ship will proceed to lay the electric line across the Atlantic to New York via Newfoundland, total length of 4,000 miles. The cable was made at Woolwich and is being laid by the Western Union Telegraph Company, who claim it will be the fastest in world and capable of transmitting 500 words a minute across the Atlantic.

# Text & Context

THE HINDU

## NEWS IN NUMBERS

**Persons rescued after fire engulfed building in Delhi's Rohini area**

**23** Twenty-three people were rescued and two injured after a fire broke out in a four-storey residential building in Delhi's Rohini on Tuesday morning. The blaze, suspected to have started in the electricity meter section on the ground floor, spread thick smoke through the building, trapping residents on balconies before firefighters evacuated them safely. PTI

**California residents return as chemical tank threat eases**

**50,000** After the threat of a toxic chemical tank explosion in Garden Grove reduced, the authorities in Southern California have eased evacuation orders. Around 50,000 residents were initially evacuated. Officials said there is no active leak from the tank containing methyl methacrylate. APF

**Amount approved for industrial projects across Maharashtra**

**89,731** in ₹ crore. The Maharashtra government approved incentives for five mega and ultra-mega industrial projects worth ₹89,731 crore on Tuesday. The projects, linked to sectors such as solar manufacturing, electric steel and synthetic graphite materials, are expected to create around 20,000 direct and indirect jobs. PTI

**Quarantine duration set for Congo, Uganda travellers to Thailand**

**21** Thailand imposed a mandatory 21-day quarantine for travellers arriving from or transiting through the Democratic Republic of Congo and Uganda amid a worsening Ebola outbreak. The move follows hundreds of suspected Ebola cases and deaths in the DRC, with Thai authorities citing risks linked to international travel and population movement. APF

**Forest areas scorched during Uttarakhand forest fire season**

**375** Uttarakhand recorded 375 forest fire incidents between February 15 and May 24, affecting 319.67 hectares across the State. Chamoli emerged as the worst-hit district, while officials said satellite monitoring, 1,438 crew stations and 5,600 fire watchers were being used to strengthen firefighting efforts. PTI

COMPILED BY THE HINDU DATA TEAM

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## The judiciary's role in complete justice

The Supreme Court is empowered under Article 142 to pass necessary orders to deliver complete justice where existing laws fail to provide a specific remedy. While this power acts as a 'constitutional safety valve', critics argue that it may lead to judicial encroachment upon the domain of the Executive or the Legislature.

## LETTER &amp; SPIRIT

C.B.P. Srivastava

Another milestone in the direction of delivery of complete justice by the Supreme Court of India is its recent decision to elevate the Right to safe travel on National Highways as a fundamental right, declaring it an integral part of the Right to Life under Article 21 of the Constitution. The Court took *suo motu* cognisance of two road accidents in November 2025, which led to a loss of 34 lives and has issued wide-ranging directives. [In *Re: Phalodi Accident vs. National Highways Authority of India and Others* (2025)]. The Court has clearly held that safe, well-maintained, and motorable roads are no longer just a policy goal, but a constitutional obligation of the state. It is an alarming fact that while National Highways comprise only 2% of roads, they account for 30% of fatalities. In 2025, National Highways in India saw approximately 26,770 deaths in the first six months alone. The government aims to reduce road accidents by 50% by 2030 and to achieve this goal, it has adopted a strategy focusing on strengthening Education, Engineering (roads/vehicles), Enforcement, and Emergency Medical Service has been adopted. Despite fatalities on the National Highways decreasing by 11% compared to 2024, they still remain alarmingly high. These figures must have been a contributing factor in the Supreme Court's decision while exercising its inherent power under Article 142 of the Constitution which talks about complete justice.

**Inherent power of the Supreme Court**  
The Supreme Court is the custodian of the Constitution. Hence, it has been given such powers which could be exercised where the law is silent or is found incapable of grievance redressal. Such powers are not conferred by statute but



The power to deliver complete justice is residuary in nature. SUSHIL KUMAR VERMA

are inherent to its role as the highest court, enabling it to go beyond strict procedural constraints to prevent injustice or abuse of process. Another condition to invoke Article 142 is a manifest error and non-exercise of it might lead to travesty of justice. The Supreme Court in *Delhi Judicial Service Association vs. State of Gujarat* (1991) has held that the power to do complete justice is entirely of different level and of a different quality. The Court further says that any restrictions contained in ordinary laws cannot act as limitation on the constitutional power of the Court.

**The concept of complete justice**  
A pertinent question that comes to our mind is whether justice could ever be incomplete. If not, then why has the term 'complete justice' been incorporated into Clause (1) of Article 142 of the Constitution? Another question that may arise is whether High Courts may also deliver complete justice.

The power to deliver complete justice is residuary in nature and it may be exercised to ensure the observance of due

process of law. This is an extraordinary jurisdiction implicitly vested with trust and faith that it shall be exercised by applying the principle of natural justice, i.e., fairness. The Court also recognises its significance, and therefore, held in *Hitesh Bhatnagar vs. Deepa Bhatnagar* (2011) that extraordinary care and caution shall be observed while exercising this jurisdiction.

Article 142 empowers the Supreme Court to pass any necessary order to deliver comprehensive, equitable justice, even if existing laws or procedural technicalities do not provide a specific remedy. This power acts as a "constitutional safety valve" to fill legal gaps. It is a well-established fact that the Constitution of India gives precedence to natural justice over other forms of justice. In a landmark judgment, the apex court, in *Canara Bank vs. Debasis Das* (2003), says that the Constitution intends to deliver substantive justice, which is the removal of injustices and it shall be delivered either by way of legal or natural justice. In a situation where legal justice is incapable of doing so, the principles of

natural justice must be followed.

**Complete justice and High Courts**

The question of whether High Courts could also deliver complete justice may be answered on the basis of the Supreme Court's decision in *Anil Kumar Jain vs. Maya Jain* (2009) in which the Court held that the powers of High Courts under Article 226 of the Constitution are certainly not at par with those of the Supreme Court under Article 142. However, justice is a wide concept and shall always be complete. Thus, the High Courts may also deliver complete justice, though in a more circumscribed manner than the Supreme Court, whose inherent powers under Article 142 serve as one of the tools for applying the concept of due process of law in rapidly changing social, economic, political and value systems within and outside India.

**Cause for controversy**

The exercise of Article 142 is often criticised as judicial overreach that undermines the principle of separation of powers. Critics point out that the Court bypasses the established laws and procedures and may encroach upon the domain of the Executive or the Legislature. However, such criticisms do not have much rationale. It is true that invoking Article 142 makes the judiciary more active. However, judicial activism involves the proactive and progressive interpretation of laws or constitutional provisions. Its constitutional intent is to deliver justice, be it social, economic, political or legal. The problem arises when new and evolving social realities, such as live-in relationships or matters relating to homosexuality, emerge and established laws and procedures may prove inadequate to deliver justice. In such situations the Supreme Court, as the custodian of the Constitution needs to proactively take steps to ensure that complete justice is delivered. (C.B.P. Srivastava is President, Centre for Applied Research in Governance, Delhi)

## THE GIST

▼ The Supreme Court of India, as the custodian of the Constitution, has been given such powers which could be exercised where the law is silent or is found incapable of grievance redressal.

▼ The Court's power to deliver complete justice is residuary in nature, and it may be exercised to ensure the observance of due process of law. It is an extraordinary jurisdiction implicitly vested with trust and faith that it shall be exercised by applying the principle of natural justice.

## The global impact of Indonesia's export policy shift

The country has announced that key commodities will soon be exported only through a state-run agency

Sonikka Loganathan

In a major overhaul of trade policy, resource-rich Indonesia announced that key commodities can soon only be exported via a state-run agency. Speaking to Parliament on May 20, President Prabowo Subianto said the Government Regulation on Natural Resource Commodity Export Governance, as the measure is called, would mean that the Indonesian Government will be the sole exporter of natural resource products, beginning with palm oil, coal and ferro alloys.

The new policy requires the resource producers to sell their commodities to PT Danantara Sumberdaya Indonesia, a state-run agency under the sovereign wealth fund Danantara. From here, the agency will engage in transactions with foreign buyers, eradicating direct sales between private resource companies and international buyers.

Analysts say the announcement signals

tightening of the government's grip over the Indonesian economy. Indonesia is the world's biggest producer and exporter of palm oil and thermal coal, and a major source of nickel. The move has sent commodities markets into a frenzy, with experts warning that its impact will be felt globally. The centralisation is set to come into effect by September, with a transition period of three months beginning in June.

In his address, Mr. Prabowo said Indonesia had lost over \$900 billion in revenue over the past 34 years because of fraud and under-invoicing. The new mandate would give the state control over the tax revenue and pricing, while strengthening overall oversight to minimise revenue leaks. Despite being resource-rich, Indonesia has struggled to convert that wealth into consistent economic growth, with state revenue-to-GDP at around 12%, whereas the Asia-Pacific average is 19.5%, and the OECD average is 33.9%. Increasing tax revenue and plugging leaks allows for

investment into the country's development goals and supports its reserves. The plan's State controlled pricing would also ensure fair transfer pricings.

**Market response**

Following Mr. Prabowo's announcement, Indonesian stocks dropped to the lowest in over a year. The Jakarta Composite Index fell by 2.4% on May 20, with major declines in energy and mining firms.

Traders and buyers are still understanding the impact of the decision and how the immediate changes will unfold. The commodities in question are vital to daily life and found in products globally. Palm oil is used globally in everything from processed foods to cosmetics, and half of the world's thermal coal exports in 2025 came from Indonesia, with China, India, Vietnam and the Philippines being the top importers. Shortages in LNG supply because of the standoff in Iran is further

pushing Asian nations, like Japan and South Korea, to lean on coal to fill energy gaps. China, in particular, is a major buyer of Indonesian nickel pig iron, a cheap alternative that is used in stainless steel production. The mineral is also a key material used in electric vehicle manufacturing. Ahead of Mr. Prabowo's announcement, the China Chamber of Commerce in Indonesia, a group representing Chinese companies, wrote a five-page letter to the President, regarding their fears over the rise in "excessively stringent regulation, over-enforcement and even corruption and extortion by competent authorities."

**Concerns over the centralisation**

In 2020, the then administration banned the export of raw nickel ore. The move intended to force global companies to invest in Indonesian nickel processing plants, thereby increasing the value of exports and bringing more revenue into the country. Last year, Jakarta created Danantara, the country's second sovereign wealth fund which has become an instrumental part of Indonesia's economic policy. However, it has done little to soothe investors about its commitment and staying power, especially in the face of political uncertainty and corruption risks.

Similar worries have been raised now. Private companies are expected to be hit hardest, as the state-run agency monopolises their role.

## THE GIST

▼ Prabowo Subianto said Indonesia lost over \$900 billion in revenue over the past 34 years due to fraud and under-invoicing. The new mandate aims to strengthen State control over tax revenue, pricing and oversight to minimise revenue leaks.

▼ Following the announcement, the Jakarta Composite Index fell 2.4% on May 20. Traders and buyers are assessing the implications of the decision and its immediate impact.

CACHE



Service grid: Behind each critical service lies a vast network of infrastructure, such as power plants, distribution systems, fuel transportation networks, and industrial installations. REUTERS

# How safe is India's critical national infrastructure?

Over the last few decades, critical infrastructure and services have been scaled up through automation, the Internet of Things and AI. However, this has also made them more vulnerable to attacks through IoT devices, highlighting the need for a policy framework to safeguard our infrastructure

L.N. Rajaram

Our everyday life depends on critical services that we often take for granted: water, electricity, cooking gas, petrol and diesel, groceries, banking, communications, transport, internet, healthcare, governance, law and order, courts and defence. Behind each of these lies a vast network of infrastructure: power plants, refineries, distribution systems, fuel transportation networks, railway stations, airports, hospitals, public utility systems and industrial installations. Any disruption can affect public safety, economic stability and national security.

Over the last few decades, these services have been scaled up through digital transformation. The internet, automation, the Internet of Things (IoT), and artificial intelligence (AI) have improved monitoring, prediction, control and service delivery. However, the same connectivity that improves efficiency also expands the risk horizon. Systems that were earlier isolated or locally controlled are now linked to digital networks, creating opportunities for remote disruption.

**Complexities of the digital landscape**

We are familiar with cyber risks in the digital world: server breaches, data theft, denial-of-service attacks, ransomware and online fraud. Governments have responded with cyber-security laws, certifications, protective systems and agencies such as CERT-In (Indian Computer Emergency Response Team). These measures have improved security, but they do not make critical infrastructure completely safe.

The larger emerging concern is that the

internet is no longer only a network of people, computers and servers. It has expanded to accommodate billions of connected devices. Cameras, GPS devices, temperature and pressure sensors, wind monitors, water-level sensors and industrial controllers are constantly collecting data and communicating with central systems. In refineries, power plants, chemical plants, manufacturing units and transport networks, such devices enable high levels of automation.

Earlier, many of these systems were local process control systems managed through SCADA (Supervisory Control and Data Acquisition system). Today, they are increasingly connected to the internet for centralised monitoring, optimisation and predictive maintenance.

This creates the important triad of IT, OT and IoT. IT operates in the digital space, processing data and enabling computing, OT, or operational technology, operates in the physical world of plants, machinery, transport, industrial automation and critical assets. IoT connects the two by sensing physical conditions, sending real-time data to digital systems and, in many cases, executing commands through controllers and actuators. This connection is powerful, but it can also become the weak link. If the IoT layer is compromised, the data collected from the physical world can be manipulated, or control over physical processes can be misused.

**Critical infrastructure security**

Therefore, critical infrastructure security must go beyond conventional cyber security. Physical installations may have heavy security and restricted access, but the devices connecting them to digital

systems may still expose them to invisible risks. The real question is whether these devices can be trusted. They must not contain hidden vulnerabilities, unauthorised data-sharing mechanisms, malicious control pathways or embedded Trojans that can be exploited later.

This issue becomes serious when imported devices are deployed in sensitive installations without rigorous scrutiny. India speaks strongly about *Atmanirbhar Bharat* and Made in India, but this intent has not always translated into procurement practices at lower levels of government departments and public sector undertakings (PSUs). Tender conditions often do not insist on trusted Indian-made products or deep security evaluation. Eligibility is frequently assessed through template-based compliance checks rather than careful examination of design origin, manufacturing authenticity and operational vulnerability. Existing IT guidelines and IoT policies are also not enforced with the seriousness required for national-level infrastructure.

Fuel transportation is a practical example. Earlier, tankers carrying fuel from oil terminals to retail outlets were protected with ordinary seals, locks and keys, leaving room for pilferage. Over time, the system moved to IoT-based keyless and OTP-based e-locking, supported by GPS tracking and digital monitoring. These solutions improve accountability and security, but they also become critical control points in the fuel supply chain. If vehicle tracking systems or e-locks are imported or unverified or dubiously certified, the oil supply chain can become vulnerable to remote disruption. There are increasing instances of electronic locks with GPS and communication capabilities that are

manufactured in China getting certifications in India as an Indian product.

**Need for strengthening certification**

The recent certification of cameras, by STQC tests devices ensures that they do not perform unintended control or data-sharing functions. However, the certification process is onerous and lengthy. More importantly, similar mechanisms are not yet available or strongly enforced for many other IoT devices used in critical infrastructure.

High level of awareness is needed for economic security. Future attacks may target the industrial base, supply chains, utilities and automated infrastructure that support national growth. A recent attack on systems that monitor U.S. gas stations' fuel storage, reported by CNN is a case in point.

As India moves toward becoming a major global economy and digitally empowered nation, the safety of critical infrastructure cannot be treated merely as a technical issue. It is a matter of sovereignty, resilience and economic security. India must embrace IoT, AI and automation, but it must do so with trust, transparency and strong safeguards. The need of the hour is stricter policy enforcement, rigorous certification, preference for trusted indigenous technologies and continuous vigilance across government and industry. The question is not whether we should adopt connected technologies, but whether we are deploying them securely enough to protect the nation's future.

(L.N. Rajaram is the National Division Chairman, IoT application in Government, Public, and Private Organisations, IoT Society of India. He is also Co-Founder, Kritilabs Technologies Pvt. Ltd., Chennai)



FROM THE ARCHIVES

## Know your English

S. Upendran

What is the meaning and origin of the expression "greenhorn"? – (S. Sainath, Hyderabad)

A greenhorn is an inexperienced, or naive person, someone who can be easily duped or cheated. The term, I understand, was first used in the 15th century to refer to a young ox whose horns had not matured. Around the 17th century, the word began to be used to refer to people; any inexperienced person began to be called a "greenhorn". In the early part of the 20th century, with the influx of immigrants, the word began to be used to refer to them. Nowadays, of course, a "greenhorn" is any inexperienced person. Here are a few examples.

The Management is not planning on hiring greenhorns.

How could you give such an important assignment to a greenhorn?

What is the difference between "assassinate" and "murder"? – (Balachand Kumbi, Manipur)

Mahatma Gandhi, Indira Gandhi, John F. Kennedy, and Julius Caesar were all assassinated. If the same thing had happened to lesser-known mortals like you and me, people would have called it "murder". When you "murder" someone, you kill him/her intentionally – it is not an accident. You can "murder" anyone; your next door neighbour or the beggar on the street. If you were to "murder" someone famous, then it would become an assassination. When famous people are killed because of political reasons, it is called an assassination. Here are a few examples.

Nobody still knows why President Kennedy was assassinated.

When Indira Gandhi was assassinated, there was chaos in the country.

We have asked Holmes to investigate the murder.

What is the meaning of the following sentence, "Dollar demand pushes rupee further south"? – (T. M. Krishnan, Tirupattur, Vellore District, TN)

We always talk about "down south" and "up north". One usually associates "going south" with going "down". In the sentence that you have given, south means "down". The demand for the dollar has pushed the value of the rupee further down.

In American English, the expression "go south" is used in informal contexts. When you say that an organisation has "gone south", it means that though the organisation was in excellent shape once, it is in extremely bad shape now.

How do you pronounce the word "manoeuvre"? – (R. Chandrasekhar, Chennai)

The "a" in the first syllable and the "e" in the final syllable are like the "a" in "China", and "around". The "oeu" is pronounced like the "oo" in "cool", "pool", and "school". The final "r" is silent. The Americans spell the word "maneuver".

The word can be used either as a verb or a noun. When you "manoeuvre" something, you move or turn something very skillfully. For example,

The soldier manoeuvred the tank through the giant trees.  
Published in *The Hindu* on October 3, 2000

### THE DAILY QUIZ

Former Prime Minister Jawaharlal Nehru died on this day in 1964. Here is a quiz on one of the central figures in India during the middle of the 20th century.

Sindhu Nagaraj

**QUESTION 1**

Upon India's independence in 1947, Nehru served as the country's first Prime Minister for how many years?

**QUESTION 2**

Also a well-regarded author, Nehru wrote many books. One of them traces the journey of India from ancient history to the final years of the British Raj. Name the book.

**QUESTION 3**

When did Nehru say this: "At the stroke of the midnight hour, when the world sleeps, India will awake to life and

freedom?" What is this speech called?

**QUESTION 4**

In the 1950s, Nehru was admired by his contemporary world leaders. Who, in a letter, said, "Universally you are recognised as one of the most powerful influences for peace and conciliation in the world...?"

**QUESTION 5**

In 1955, then British Prime Minister Winston Churchill called Nehru with a title? What is it?

**QUESTION 6**

Nehru specifically wrote which article of the Indian constitution under the Directive Principles of State Policy?



Visual question: Which conference is this 1955 image from? UNITED PRESS

Questions and answers to the previous day's daily quiz:

- This 1909 work by V.D. Savarkar was proscribed by the British Raj. **Ans: The Indian War of Independence**
  - This 1954 satirical retelling of the Ramayana by Aubrey Menen became one of the earliest books banned in independent India. **Ans: Rama Retold**
  - This novel by Salman Rushdie was banned by the Rajiv Gandhi government for allegedly hurting Muslim sentiments. **Ans: The Satanic Verses**
  - This book by Taslima Nasrin was banned in West Bengal in 2003. **Ans: Dwikhandito**
  - This biography by Joseph Lelyveld was banned by the Gujarat government in 2011. **Ans: Great Soul: Mahatma Gandhi and His Struggle with India**
  - This 2009 book by Wendy Doniger was withdrawn by Penguin India after a legal challenge. **Ans: The Hindus: An Alternative History**
- Visual: Identify this individual, who introduced the Censorship of Press Act of 1799, imposing pre-censorship on newspapers, pamphlets and printed material. **Ans: Richard Wellesley (Lord Wellesley)**
- Early birds: Utsav Kaushal | Mohan Lal Patel | Parimal Das | Sukdev Shet | Arun Kumar Singh

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

### Word of the day

**Jovial:** full of or showing high-spirited merriment

**Synonyms:** gay, jocund, jolly, merry

**Usage:** The usually stern professor was surprisingly jovial at the farewell function.

**Pronunciation:** newsth.live/nNMmE/jovial

**International Phonetic Alphabet:** /dʒəʊ.vi.əl/

For feedback and suggestions for Text & Context, please write to [letters@thehindu.co.in](mailto:letters@thehindu.co.in) with the subject 'Text & Context'

## The Indian EXPRESS

FOUNDED BY -  
RAMNATH GOENKA

BECAUSE THE TRUTH  
INVOLVES US ALL

### India First can converge with America First

**A**GAINST THE backdrop of an uneasy phase in India-US relations over the past year or so, US Secretary of State Marco Rubio's visit to India signalled reassurance to New Delhi that Washington remains committed to a long-term strategic partnership. He sought to convey that recent US actions (related to tariffs and visas, for instance) were not aimed at India, but were part of a broader effort to rebalance US trade and modernise the American immigration system. "The relationship continues to be strong... by the end of this administration, it will be stronger than it's ever been," Rubio said. He also attempted to address the Pakistan question, stressing that US engagement with "other countries" at a "tactical" level would not come at the expense of close ties with India. For its part, New Delhi articulated its position clearly, with External Affairs Minister S Jaishankar outlining a five-point framework on regional and global issues. Dialogue and diplomacy, safe and unimpeded maritime commerce, adherence to international law, opposition to the weaponisation of market access and resources, and the importance of trusted partnerships and resilient supply chains.

At the heart of Rubio's visit was the Quad foreign ministers' meeting, which unveiled major initiatives in maritime surveillance, port infrastructure, critical minerals and energy security. Yet the larger geopolitical context raises questions about the future trajectory of the grouping. The growing rapprochement between the US and China following President Donald Trump's recent summit with President Xi Jinping in Beijing, coupled with signs that Washington may be recalibrating its military priorities away from the Indo-Pacific to West Asia, calls for a reassessment of an alliance originally conceived to ensure a free and open Indo-Pacific by countering China's expanding influence. The fundamentally competitive nature of India's relationship with a growing China is unlikely to change, and managing the changing realities will test Indian diplomacy.

This, in turn, underlines the limits of diplomacy in the absence of stronger domestic capabilities. Until New Delhi builds greater leverage through sustained economic growth and modernisation, it will remain vulnerable to geopolitical pressures beyond its control. During his joint press conference with Rubio, Jaishankar acknowledged that the Trump administration has been forthright about pursuing an "America First" policy, and said that Delhi, too, is guided by an "India First" approach. Convergence of interests does not mean cooperation, but India's standing in a fractured world order will ultimately rest on the strength it builds at home.

### Warmer nights are a public-health challenge

**S**UMMERS in most parts of India have usually been harsh. However, sunset would bring some relief. The evening breeze and lower temperatures allowed the human body to recover from daytime stress. But this pattern is changing. Nights have become uncomfortable, especially for those without access to air conditioning. A recent study by Climate Trends, a Delhi-based climate research organisation, in medium- and low-income residential units in Chennai, showed that the peak night temperature was not very different from that experienced by people during the hottest part of the day. Research on the ways this changing weather pattern is affecting people's lives is an emerging field. Heat-related morbidity is also under-reported and not properly documented. But studies have underlined how heat can cause cardiac stress and worsen existing illnesses, including respiratory problems and kidney ailments. The elderly, children and people dependent on outdoor jobs — vendors, construction workers, and those employed in the gig economy — are particularly vulnerable.

Several Indian states, cities and even districts have heat action plans (HAPs). They generally include early-warning systems, public advisories, cooling centres and coordination between local agencies. However, the quality of these plans is uneven. Several lack dedicated funding and enforcement mechanisms. The emphasis is overwhelmingly on emergency response, and inadequate attention is given to long-term adaptation. Most of them fail to identify the most vulnerable sections and do not suggest roadmaps to incorporate heat resilience in urban governance. A White Paper by researchers at Harvard University's Salata Institute, released in April, underlines the scale of the challenge — it pointed out that close to 38 crore workers in India are exposed to heat, but the country's adaptation policies are deeply unequal. In most of urban India, natural landscapes have been replaced with heat-absorbing concrete, asphalt and glass. The arrangement of housing enclaves has shrunk air corridors. The changing weather pattern, therefore, is also an architectural and urban planning challenge. Building designs need to prioritise ventilation and energy efficiency, while urban policy should nudge industry to devise cooling solutions for low-income households. The country cannot postpone meaningful conversations on improving living conditions in the face of climate vagaries.

### The art of living, outsourced

**R**EMEMBER THE mid-2000s, when social media was the breakthrough technology, and the conversation around "connecting people" on the World Wide Web was mostly optimism and sunshine? A couple of decades later, the story has changed to screen addictions and digital detox and "guardrails". The Indian start-up ecosystem has its own share of fairy tales running into reality checks. Initially, food delivery, ride-sharing, service and quick commerce apps were seen as delivering convenience and convenience. It's becoming increasingly clear, though, that the abundance of cheap labour is the backbone of these "innovations".

A new entrant, CarryMen, a Delhi-based start-up, offers customers in Lalpat Nagar market a respite from carrying bags, standing in queues and other forms of tedium — all for around Rs 100 per hour. As a part-time job, it may not be too bad. But past experience shows that the fairy tale ends when apps scale. Even if it ends up as a win-win, something could be lost. The urban Indians of means have become used and privatised a lot of their lives. An algorithm all but chooses what you eat on an app; the frustration of finding an auto or a cab is gone, as is trying to find an electrician or plumber at short notice. And now, you don't need to even carry your own bag while shopping. Life is smooth of its texture, its rough edges. No worries, though. There's probably someone coming up with an app to simulate actually living in the city.



**RAJA MANDALA**  
BY C RAJA MOHAN

**L**OVE IT or hate it, the media frenzy and political frisson that American leaders generate in Delhi remains unrelenting. Why do visits by the Russian foreign minister or his Chinese counterpart not provoke the same excitement and anxiety as the just-concluded four-day sojourn of US Secretary of State Marco Rubio? To be sure, the US is India's most weighty partner, and the 2025 turbulence in ties explains some of the hype surrounding Rubio's visit. There is more to it. While Russia may be India's "best friend forever" and China its most consequential neighbour, neither relationship carries the emotional intensity that both binds and strains India's engagement with America. Unlike the US, the Indian elite has little social intimacy or political familiarity with Russia or China. There is only the G-to-G relationship and the coded diplo-speak associated with it. India's communists once engaged with the Soviet and Chinese polities. That bridge has collapsed.

In contrast, America looms large over Indian society. The Indian elite's social links, mobility plans, cultural aspirations, intellectual networks, and technological connections with the US deepened steadily even during the bitterest phases of the Cold War,

and have grown by leaps and bounds since. There is a huge business dimension today that did not exist earlier. Even our English has changed. British spellings survive, barely but "blokes" have become "bros" and "doing fine" has yielded to "all good".

India is not alone in adopting American culture. Even many critics of Washington across the world continue to seek access to the opportunities and prestige that America uniquely offers. American soft power still rules the world. Despite the negative effects of US President Donald Trump, the US will continue to outrank Europe, Russia and China in any index of attractiveness.

Anti-American public posturing has a long provenance in India, on the Left and Right alike. There is a historical parallel: In the late 19th century, American elites sought British approval even as they bristled at every perceived slight from London. Rising powers often oscillate between attraction to and resentment of the hegemon. Delhi, however, some of that ambivalence last week amid the torrent of criticism directed at American policies and the excessive anxiety over the durability of the India-US partnership.

On the surface, not much appears to have changed since the early 1990s, when India and the US began reconstructing ties. Every visit by even relatively junior American officials became a headline news, accompanied by fears about US mediation on Kashmir, pressure on India's nuclear programme, and concerns over sovereignty. Agreements with Washington routinely invited accusations of "arm-twisting" and "capitulation".

But the relationship today is very different. The US is now India's

largest economic partner across trade, investment, technology and higher education. Washington has steadily de-hyphenated India from Pakistan. Successive administrations came to view India as an important element in balancing China in Asia. The long disputes over nuclear non-proliferation and technology denial regimes have been addressed to a large extent. India's foreign-policy establishment gradually moved beyond its inherited anti-American reflexes in the 21st century. Yet the first year of Trump's second term has revived old anxieties. Tariff threats against Indian exports, pressure over Russian oil imports, and uncertainty about Washington's future approach to China and Pakistan have resurrected familiar fears.

Rubio's visit was an effort at reassurance; the Indian establishment will wait to see how this plays out in practice. The Quad foreign ministers' meeting also reaffirmed the continuing importance of multilateral cooperation in the Indo-Pacific. Repeating public sentiment, however, will take longer.

Looking beyond Rubio's visit, three considerations stand out. First, Delhi must honestly assess whether it fully utilised the opportunities opened by America's strategic rethinking of Asia over the past two decades. Political hesitation,

ideological confusion, and bureaucratic caution prevented India from fully leveraging the geopolitical openings the US created since the turn of the century. Too much debate and too little action in Delhi contrasts with the boldness with which Deng Xiaoping's China seized the US embrace to lift itself to great-power status. The mistaken sense that America needs

India more than Delhi needs Washington has fostered strategic complacency.

Second, we are dealing with a very different US from the one that went out of its way to befriend India 25 years ago. India must come to terms with the structural shifts underway in US foreign policy under Trump, especially regarding the Eurasian balance of power. Traditionally, the US relied on alliances to manage Russia and China. Trump is more sceptical about the value of partnerships, with an apparent belief that Washington can unilaterally manage both. India has felt the effects of this. There is understandable concern in some Indian quarters about Washington's future approach to China and Pakistan. But objectively speaking, India today is far stronger than during earlier phases of strategic divergence with Washington — when the US was far closer to Beijing and Rawalpindi than it is today.

Third, whatever direction US policy takes, India must adapt. Its response must be twofold: Continue working with the US, bilaterally and through the Quad, to sustain a favourable balance of power in Asia; and accelerate India's economic transformation and strengthen internal unity. External partnerships can help India share the balance in Asia, but they cannot substitute for national capability and coherence. India has the cards; the question is whether it can play them with confidence.

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

### Delhi's dust pollution needs science, not seasonal optics



**GUERAN BEIG**

**D**UST POLLUTION has emerged as a major public-health hazard in Delhi. Before going deeper into the challenge, it must be made clear that in almost all cases of air pollution, the sources are local and, theoretically, controllable. However, the "local" must be defined in terms of the airshed and not city boundaries. Weather or climate change influences the trajectory of pollutants.

In winter, cooler air and slower winds prevent pollutants from dispersing, causing pollution levels to rise sharply. In summer, higher temperatures and stronger winds increase atmospheric mobility, enabling dust to rise and spread rapidly — that's what we are witnessing these days. Ironically, however, discussions around water sprinkling intensify during winter, when natural dust lifting is relatively limited because of calm winds. In reality, water sprinkling becomes far more important during summer.

Dust pollution can be understood through three distinct categories. The first is natural dust, which depends on landscape characteristics, land use and land cover. The second is re-suspended dust — it's generated from paved and unpaved roads when vehicles move over them. Greater traffic volume, higher vehicle speeds, and poor road conditions significantly increase dust levels, especially during winter. Calm winds reduce the natural dispersion of dust, while continuous vehicular movement keeps dust particles suspended in the air.

The third type of dust generated is when prescribed norms are not followed during construction activities. Though it contributes least to pollution among the three categories, it often receives the closest administrative attention, as reflected in measures such as the GRAP guidelines. At present, Delhi is struggling primarily with severe natural dust lifting, in addition to the other two dust sources. The critical question is: Why has the summer of 2026 witnessed such extreme severity? The answer lies in large-scale weather patterns, likely amplified by climate change. India appears to be entering a phase of Super El Niño conditions. One of its earliest consequences has been predictions of a weaker monsoon by weather agencies.

As the Pacific Ocean warms, Super El Niño conditions intensify heat across the Indian subcontinent. This year, Indian cities have repeatedly featured among the world's

hottest locations. Widespread heating across South Asia has dried surface moisture over a vast region, making soil loose and highly vulnerable to wind-driven dust lifting.

Traditionally, western India experiences severe dust storm activity during summer. This year, however, northern and eastern India have borne the brunt because the vast Indo-Gangetic Plain has experienced intense heating across its entire stretch. Dust has consequently been lifted on a much larger scale, with transport winds carrying it partly from the Indo-Gangetic region and partly from Rajasthan and adjoining desert areas towards Delhi. Delhi has found itself trapped between multiple dust corridors.

Strong summer winds — locally known as loo — have further enabled this dust to spread. Addressing this challenge requires long-term planning and structural interventions rather than temporary quick fixes.

Several solutions therefore become critical. First, policymakers must understand the science behind each pollution source and the mechanisms through which weather and seasonal conditions influence them. Different sources behave differently across seasons, and mitigation strategies must reflect this reality. Second, implementation backed by scientific evidence is essential for meaningful results. Third, alongside expanding the coverage of mechanical road sweeping machines (MRSM), India must develop technologies that combine efficient sweeping with optimised water sprinkling to suppress dust at its source.

Fourth, better traffic management is crucial for reducing road dust. Electric vehicles can reduce fossil-fuel emissions, but they cannot eliminate re-suspended road dust. That challenge requires smoother traffic flow, better road maintenance and sustained transport management strategies.

Fifth, construction norms, including green covering measures, must be enforced, though construction dust should not overshadow larger contributors. Finally, cities need significantly greater green cover and more water bodies to stabilise soil surfaces.

As climate change intensifies, vigilance will become increasingly necessary. The changing geography of dust pollution is a warning: Climate-linked extreme events are becoming more unpredictable, more widespread and more difficult for humans.

The writer is chair professor, NIAS, IISc-Campus and founder, SAFAR

### When the joke is on the vulnerable, it is not funny



**INDU BHUSHAN**

**A** RECENT advertisement by a cement company features actor Ranbir Kapoor locked in a bare room, speaking incoherently and behaving irrationally. It ends with Kapoor, now dressed as a doctor, reassuring the audience that the person inside cannot escape because the room is built with strong cement. The commercial may have been intended as a harmless humour. But it reflects a disturbing insensitivity towards mental illness. It turns mental illness into a spectacle for entertainment. Behaviour associated with psychological distress is caricatured and presented as comedy. This reinforces the deeply damaging stereotype that people with mental-health conditions are objects of ridicule rather than individuals deserving empathy, treatment and dignity.

Even more troubling is the underlying message that such individuals should be confined. The imagery is impossible to separate from a darker history of mental-health treatment, when people with psychiatric conditions were deprived of basic human dignity. The emphasis today is on treatment, inclusion, community support, rehabilitation — not segregation.

India's enormous burden of depression, anxiety and suicide is made worse by the social and psychological stresses that have intensified in recent years. Yet, access to mental-health services remains inadequate, with severe shortages of psychiatrists, psychologists and community-support systems. Social stigma remains a big barrier preventing people from seeking help. Families hide mental illness and young people hesitate to speak openly about depression or anxiety. An advertisement that uses mental illness as comic relief, therefore, only deepens prejudice.

Companies today speak frequently about inclusion, diversity, ESG (Environmental, Social, and Governance) commitments and social responsibility. Many invest in campaigns related to gender equality, disability rights and social inclusion. Mental health deserves the same sensitivity. A corporation cannot claim commitment to social responsibility while its advertisements mock vulnerable individuals. Celebrities, too, cannot escape responsibility. Public figures wield enormous influence, particularly among younger audiences. When they endorse content that demeans mental illness, it normalises prejudice and undermines years of work by professionals and civil-society organisations.

At the same time, it is important to recognise that several public figures have played a constructive role in changing attitudes. Celebrities such as Deepika Padukone have spoken openly about their struggles with depression. Others from cinema, sports and media have encouraged people to seek support without shame or fear. These efforts have contributed significantly to reducing stigma, especially among younger Indians. Precisely because celebrities possess such influence, they must recognise that the messages they endorse carry wider social consequences.

Humour has a place in advertising. But humour that humiliates is neither clever nor harmless. Creative freedom cannot be a excuse for demeaning vulnerable groups. This episode should prompt serious introspection within India's advertising industry about ethical boundaries and social responsibility.

A compassionate society is judged not by how it treats the powerful but by how it treats the vulnerable. Mental illness is a human condition deserving understanding, care and dignity.

The writer is founding CEO, National Health Authority

### 40 YEARS AGO

May 27, 1986



#### Barnala rules out Army role

PUNJAB CHIEF Minister S S Barnala ruled out the deployment of the Army in Punjab's troubled border districts, saying the problem was essentially a policing matter and not one for the armed forces. He made the remarks at a press conference after visiting the Golden Temple complex, where he had completed a 600 km walk led by Sikh high priests following the police entry into the complex on April 30.

#### Decision on Chandigarh soon

PUNJAB HAS agreed, between the Venkatar-

miah Commission, to offer 15,000 acres of land in the Rajpura tehsil of Patiala district to Haryana in exchange for Chandigarh, matching the area of the UT. The Commission chairman had asked Punjab to present its proposal. Punjab's cabinet subsequently submitted a list of equivalent land areas, with a final decision expected on June 1.

#### Police firing in Darjeeling

THE ARMY was alerted in Kurseong in Darjeeling district after five Gorkha National Liberation Front supporters were killed in police firing, prompting heightened security across

the region. Two BSF battalions were deployed, and restrictions were imposed throughout the district.

#### Bangladesh boat disaster

AT LEAST 150 people were reported dead and several hundred others missing after a motor launch capsized in the Meghna River near Barisal in Bangladesh. The vessel was in stormy conditions near Maulviatirth, about 227 km from Dhaka. Reports suggested the death toll could be as high as 500, with large-scale rescue and recovery efforts underway amid fears of many more casualties.

# Liberal-arts education matters more, not less, in the age of AI: Five reasons why



AMITABH MATTOO

**E**VEN AS universities across India seek to implement the National Education Policy, they are confronted with a deeper question: What should higher education look like in the age of Artificial Intelligence? Fortunately, the NEP's focus on multidisciplinary learning and intellectual flexibility is remarkably prescient. In a world being shaped by AI, the future will be shaped by societies that can think across disciplines, rather than simply excel within a single specialisation. It also revises the importance of liberal-arts education.

Over 25 years, in academic leadership, I have seen recurring waves of anxiety about the relevance of liberal-arts education. Successive eras of doubt about the importance of the liberal arts have been driven by the growing dominance of STEM subjects. Questions about humanities and social science degrees are often posed in terms of "worth" or return on investment, disciplines that are intellectually interesting but economically dispensable. The age of AI has finally exposed the poverty of that thinking.

Liberal-arts education is now — more than ever — India's key to the future. Here's why. First, while data may be the new marker of literacy, information alone is not enough. Yes, artificial intelligence can process massive amounts of data at speeds no human can match. Yes, AI can write essays, create computer programs, identify trends, and engage in convincing conversation. But at a time when AI is dangerously masquerading as truth, nothing can substitute judgement informed by history, ethics, culture and politics. The more sophisticated machines become, the more precious distinctly human capacities will become.

The second reason to embrace liberal arts is that future problems will not come neatly labelled as History, Economics or Computer Science. Debates about the liberal arts versus STEM are based on a false binary. The biggest challenge facing India

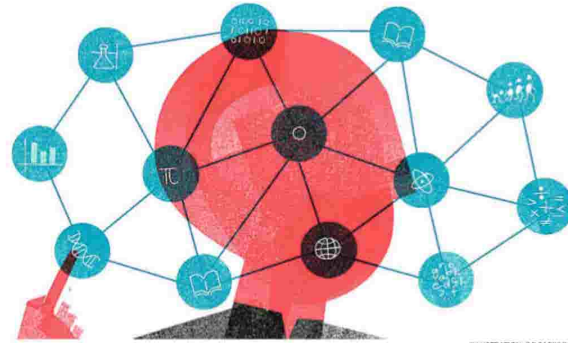


ILLUSTRATION: C. S. SARKISWAR

is whether — and how well — it can do both. The best engineers will need the insights of History, Political Science and Ethics to solve the problems of the future. Good technologists will need social science to build humane technology. India needs economists who can speak knowledgeably about climate change and behavioural science. In the age of AI, disciplinary silos will hinder those who work within them. That's why the NEP's stress on multidisciplinary and holistic education is so welcome.

Third, liberal-arts degrees matter for democracy. Democracies need citizens who can think critically, engage in civil disagreement, and have some understanding of the past. When markets determine educational priorities, the social value of learning can easily be reduced to its immediate monetary value. History, Philosophy, Anthropology and Political Theory will always seem less important than degrees with easy job placements. But democracies that stop valuing these subjects will do so at their own peril. Universities are, after all, more than employment facilitation or placement centres.

When JNU was created more

than five decades ago, it was imagined almost as an intellectual republic. Students came from every corner of India and were introduced to new ideas that helped them see beyond the limits of their backgrounds and communities. The value of universities like JNU is not simply in what they research or publish; it is in the idea of a public space dedicated to knowledge for its own sake. Just as importantly, universities play an important role in nurturing democratic citizenship and values. To be sure, private universities have expanded access to education and brought change to India's higher education ecosystem. From Shiv Nadar to Ahmedabad University to Ashoka, several private institutions have pioneered serious investments in liberal-arts education and interdisciplinary programmes. With India's vast population, we need both private and public universities. Yet there is also reason for caution. Once you let market forces alone dictate the purpose of a university, certain areas of study will naturally be privileged over others.

The fourth reason to care about liberal-arts education is resilience. Coding languages and technical skills change every few years. What

employers look for changes. What will not change — and what humans will always need — is the ability to think critically, communicate effectively, and relate to others. As AI takes over more of the work of blue-collar and white-collar jobs, human skills will need to become more human. Liberal-arts degrees are uniquely positioned to provide that education. At JNU's School of International Studies, we see it play out in real time as the field of International Relations is being reshaped by tech, climate change, cybersecurity, big data and disinformation aren't just "tools" to be studied — they will define both opportunities and challenges for the next generation of global leaders. Which is why we must train students who are not only tech-savvy, but historically literate, ethically mindful, and globally literate.

The fifth reason is civilisational. India's own intellectual traditions never viewed knowledge as fragmented into isolated disciplines. There was no divide between Philosophy and Politics, Economics and Ethics, or even Literature and public service. Education was seen as a cohesive whole. India's strengths in the modern knowledge economy are tied to a return to this interdisciplinary approach. The NEP, in many ways, mirrors a growing recognition that Indian traditions of knowledge are no longer compartmentalised.

For decades now, I have had the privilege of learning from students across India and the world — whether at public universities in India's conflict areas or leading universities abroad. What I have learned from them is that higher education must do more than create workers. It must help us become better human beings.

India today has a historic opportunity. If implemented with care and seriousness, the NEP has the potential to help India educate a generation that is technologically literate and democratically mindful. That will make India not just a stronger knowledge economy but a stronger democracy, and improve the quality of life of all its inhabitants. For the ultimate challenge posed by AI is not technological, it is human. Machines may increasingly answer questions. Universities must still teach which questions are worth asking.

The writer is dean of the School of International Studies, JNU and professor of IIR at the University of Melbourne

# Was Nehru right or wrong? Let's not obsess over wrong question



MANOJ KUMAR JHA

**F**AR FROM receding into the fog of history, Jawaharlal Nehru retains a quick recall for not many public figures can rival even today. Nehru's ability to animate politics with such intensity more than six decades since his death is an indicator of his central location in the ongoing struggle over the meaning of India itself.

By continuously pushing the notion of his "mistakes", the attempt is to dispute Nehru's position as a historical statesman and turn him into a convenient repository of blame. While many debaters on all sides of the ideological divide engage in polemics around Nehru, the task for those seeking to develop an understanding of history is neither to sanctify him nor to shield him from criticism, but to place him, his ideas, and his actions within the constraints and dilemmas of his time.

Nehru guided a nation newly emerging from the debilitating violence of colonial rule and the immediate trauma of Partition. Not only was the young India economically weak and socially fractured, its administrators and institutions also had no experience as autonomous functionaries.

While many post-colonial states quickly descended into coups and one-party systems, Nehru played a central role in legitimising parliamentary politics through respectful engagement with the Opposition, even when he could have taken authoritarian shortcuts. He was clear-eyed that democracy involved educating the citizenry and a robust culture of institutionalised accountability.

While Nehruvian secularism is often misunderstood in contemporary debate, it is important to point out that it was neither hostile to the institution of religion nor to any particular faith. It was not an attempt to erase faith from public life; rather, he sought to strengthen a framework that could prevent the state from privileging one religious identity over another. The challenge of welding together a country into a functioning republic was unprecedented, and his writings show that as the first PM, he understood the full import of this challenge.

This composite vision of India is also reflected in Nehruvian economic ideals. The conditions in which Nehru decided the direction of India's economic development are not disputed. In the early 1950s, Indian private capital was neither willing nor equipped to build steel plants, heavy machinery or large-scale irrigation. Nehru built a public sector to meet the national development in place of an imperial machinery whose objective so far had been to suck India dry. Private enterprises, even today, demand vast freedom and little regulation. At the same time, they expect heavy state investment and support that make such "freedom" possible. The regulations may be criticised as excessive, but they should not eclipse what state-led development achieved when private enterprise was hesitant and foreign capital anathema.

Nehru knew that transforming India's masses into a citizenry of a functional democracy required cultural infrastructure. The Sahitya Akademi, Lalit Kala Akademi, Sangeet Natak Akademi, National School of Drama, Film and Television Institute of India, Films Division, and so on emerged from this conviction. These institutions might appear paternalistic and flawed by today's standards, yet they nurtured generations of writers, artists, filmmakers, and performers.

Even Nehru's foreign policy deserves more nuance than current polemics allow. Non-alignment is often caricatured as naive moralism. But in the rigid bipolarity of the Cold War, it was a pragmatic policy and an assertion of sovereignty, and carved out strategic space between rival blocs not only for India but also for other newly decolonised nations.

How does one evaluate the legacy of a pacifist statesman in times of war and internal strife? Anti-militarist scholars interpret the conflict with China through the ambiguities of colonial border-making and competing regional hegemonic aspirations. They regard the policy before 1962 as naive, some going so far as to say that Nehru's moral internationalism coexisted awkwardly with emerging Indian strategic ambitions. This is true with respect to Kashmir and the wars with Pakistan, too. Nehruvian internationalism could not escape the logic of the military consolidation of the Indian state.

We do not need to waste any more time obsessing over whether Nehru was right about every policy. The Nehru of our inheritance would not require us to unthinkingly repeat his choices but to recover the outlook he embodied. His faith in procedure and institutions, willingness to explain and persuade when he could have easily commanded, made India a durable democracy.

The writer is MP (Rajya Sabha), Rashtriya Janata Dal

## LETTERS TO THE EDITOR

### Identity crisis

VANDITA MISHRA's analysis is measured and worth reflecting on ("Dead ends on the road from Bengal, both sides need new directions", *IE*, May 26). What strikes me most is the observation that both sides are now treating political problems as identity problems. That substitution is dangerous. The Opposition cannot build a credible alternative simply by opposing Hindu consolidation — it needs a governance-centred agenda that speaks to ordinary voters regardless of community.

K Sakunthala, Coimbatore

### Choking Cuba

THE IMPOSITION of unilateral coercive measures has historically precipitated humanitarian catastrophes driven by protracted civil conflicts, violations of international law, and mass displacement (Cuba and the quiet cruelty of US sanctions", *IE*, May 26). It can be seen in the use of sanctions by the US specifically for regime change in several countries, including Cuba, Venezuela and Iran, which has led to mass starvation, weaponised aid, and regional instability, pushing civilians to a breaking point.

Vaibhav Goyal, Chandigarh

### Cannes carpet

THE OBSERVATION about Cannes recalibrating toward purpose over glamour is interesting, though one should be cautious about reading too much into a single year's lineup ("At Cannes, a paler red carpet, a sharper frame", *IE*, May 26). European cinema has always carried a stronger auteur tradition, and the Palme d'Or has never reliably tracked commercial appeal. What the low-wattage celebrity presence does usefully signal is that serious cinema no longer needs the scaffolding of franchise stars to command critical attention. For Indian filmmakers, that is actually an encouraging opening.

S.M. Jeeva, Chennai



APOORVA JAVADEKAR

THE RBI has approved the largest-ever dividend (yet slightly short of expectations) of Rs 2.87 lakh to the government, which will cover roughly 20 per cent of the latter's deficits — a timely transfer given that the government is supporting a larger fuel and fertiliser subsidy bill. One can evaluate the transfer from legal, monetary/fiscal policy, and political economy perspectives.

First, the RBI makes profits from interest income out of its domestic and foreign investments in various bonds, mostly by selling the dollar at a higher rate, as well as because it sells the dollar to defend the rupee when the former appreciates. This means that when the rupee is falling, an activist central bank generates dividends to the government — a unique cushion many emerging-market economies, enjoy. As comforting as this might be, in a political economy as complex as India's, it cannot dictate why the RBI needs to be aggressive in defending the rupee to help the fiscal position.

Second, the RBI pays dividends to the government under the RBI Act, 1934 (Section 47) after setting aside a minimum contingency risk fund (CBR) in accordance with the Bimal Jalan committee recommendation — in fact, in a more conservative way. The RBI used the maximum contingency buffer from 6.5 per cent to 75 per cent (of its asset position) a year ago, set aside 7.5 per cent CBR last year, and

# Bigger RBI dividend, smaller fiscal comfort zone

continued doing so this year. The reserve ratio is also on the higher side. Hence, it is not as if the RBI is paying the government by stretching its buffers too thin.

Then what is the problem? First, reliability and volatility. Unlike taxes, the RBI's profits could be way more volatile than we imagine. In years to come, when the RBI decides to float the rupee more freely, the profits from selling dollars or other foreign exchange interventions will progressively contribute less to its income. The bond yields are volatile and will impart that volatility to the RBI's interest income, too.

An active monetary policy that injects significant liquidity into the market or deploys QE-type strategies by buying government bonds needs to keep aside a larger risk buffer to support the expanded balance sheet, reducing the surplus/dividend that can be transferred to the government. The RBI injected Rs 10 lakh crore worth of liquidity this year, which expanded its balance sheet by 20 per cent, requiring a larger risk buffer. In economically challenging times, when the bank is expanding its balance sheet, the government is also likely to run an expansive fiscal programme; a cut to RBI dividends at that time hurts.

In economically challenging times, when the central bank is expanding its balance sheet, the government is also likely to run an expansive fiscal programme; a cut to RBI dividends exactly at that time hurts

Second is the perception problem. If institutional investors perceive the RBI-government nexus as defined by the dividend mathematics, it risks running with as-

sumptions about the central bank's independence being compromised. The US experience — when Donald Trump attempted to control the Fed — tell us that this can significantly alter the currency's valuation and damage the flow of foreign investment into the country's debt and equity markets. India and other emerging economies have far less room for manoeuvre than a hegemon like the US. In other words, the fiscal nexus between the RBI and the government can create a balance of payments situation for the central bank, making it difficult for it to accumulate foreign exchange reserves in the first place. Lastly, it can lead to a fiscal profligacy problem if governments rely on RBI dividends even during good economic years.

Does India have a fiscal problem? In some respects, yes. At 85 per cent, the combined debt of the Centre and states is higher than that of many Asian peers. The RBI's ownership of government bonds is rising, a growing share of government spending is going to debt interest payments, there is under-spending on key schemes like the Jal Jeevan Mission to meet fiscal-deficit targets, and expensive promises are made during state elections. In some ways, India has to balance providing greater-than-expected support, due to the ongoing crisis and expected lower rainfall, with maintaining a sustainable budget. Either way, the RBI dividends will help.

The writer is chief economist, Muthoot FinCorp Ltd



KRUPA GE

IHAD never been much of a jewellery girl, either while growing up or as an adult, no thanks to those strict school-uniform checks that took away any desire for accessories. While I appreciate the sentiment — the school was trying to minimise feelings of conflict between those whose parents could afford to make them look rich and those whose couldn't — that extreme advocacy for a certain bland look meant I had got so used to that life, even a minor variation from that bareness left me feeling uncomfortable.

# All that glitters is emotion

But then, I recently turned 40, and all of a sudden found myself looking for ways to accessorise that didn't seem too far from who I was. It might have to do with the fact that I'd been struggling to express my femininity, what with a changing body (I know it sounds like I am talking about adolescence, but look up matrescence) that made it difficult to accept what was in the mirror. So I did what I do whenever I need life advice. If you thought I was going to do something remotely responsible, you're going to have to live with disappointment. I opened Pinterest and created a secret mood board of the things I'd like to do to feel good. I looked through archives of photos to see what women down the ages, ordinary and royal, were doing much before salons

and beauty parlours to express femininity. Of course it turned out to be jewellery. I already had a nose piercing, so adding another nose ring to that formidable collection would obviously be my first priority, because who cares about logic? Then I remembered with great fondness the only other piece of jewellery I'd never taken off: A tiny emerald set in a ring that my mother gave

I looked through archives to see what women down the ages were doing before salons and beauty parlours to express femininity. Of course it turned out to be jewellery

me as I finished school, to wear on my little finger to help me with my career. I'd like to think it's what set me off on the career path I took. So now my mood board had photos of nose-pins and emerald rings.

Next, I searched for photos of "quiet luxury" earrings, because all the vintage Indian women were wearing not-so-quiet gold-and-precious-stone earrings, and because I was still thinking of becoming "quietly feminine." I added solitaire earrings to my board. Then I came upon the plan of three more ear piercings. For these, I looked at gold earrings.

Everything was ready. I even mustered the courage to tell my mother I was going to take out every piece of jewellery I owned from the locker, everything she had given

me as I was growing up, and start using them as I had my own. I had to ask her, but if anyone were to comment on it, she and I would have gone to war. It was not just the fruit of my parents' labour, it also carried immense sentimental value. I was also obviously going to have to buy more gold to follow through with my needs. The first investment I was going to make in my self-image in years.

Who would have thought the Prime Minister of India would play the villain in this hero's journey (and not my mother, who quickly agreed to the plan)? Boo! I say, could that dreadful announcement not be bought gold not have waited a month more?

Ge is the author, most recently, of Burns Boy

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TECH

## Behind Musk's ambitions with SpaceX IPO



SpaceX's Starship rocket lifts off during a test flight from Starbase, Texas, on May 22. AP

Soumyendra Barik  
New Delhi, May 26

THE PROPOSED initial public offering (IPO) of billionaire Elon Musk's rocket and satellite company SpaceX is shaping up to be one of the biggest moments in modern capital markets. If the company — which confidentially filed for an IPO last month — achieves the valuation target of about \$1.75 trillion, it would surpass even Saudi Aramco's 2019 debut as the world's largest IPO.

### It's all about AI

SpaceX is repositioning itself as a combined space, connectivity, and AI infrastructure company. The integration of Musk's AI venture xAI into the broader SpaceX structure fundamentally changes the investment thesis.

Until recently, investors largely viewed SpaceX through two business lenses: reusable rockets and Starlink satellite internet. The filing now places heavy emphasis on AI compute, orbital data centres, and future infrastructure that could support massive AI workloads in space.

### THE SPACEX STORY

- Founded in 2002, SpaceX has evolved from a rocket launch startup into one of the world's most influential technology firms.
- It operates reusable Falcon rockets, the Starlink satellite network, and the Starship deep-space system, besides providing artificial intelligence and orbital computing infrastructure.

Starlink-powered orbital infrastructure, including space-based data centres powered by near-continuous sunlight. This is because AI has become an energy problem as much as a computing problem. Data centres powering large AI models consume enormous electricity.

### Orbital data centres

SpaceX argues that the next phase of AI growth will be constrained not by chips, but by electricity, cooling, and land availability on Earth. SpaceX says it plans to eventually deploy data centres in orbit powered by near-continuous solar energy.

The idea is that satellites in orbit can access uninterrupted sunlight for much longer periods than terrestrial solar farms, while the cold vacuum of space could theoretically reduce cooling costs for AI servers.

### Starlink keeping the company afloat

The filing shows that Starlink has emerged as the company's most important commercial business. While the launch division remains strategically critical, satellite broadband is currently the only consistently profitable segment.

Starlink generated more than \$1 billion in operating profit in the first quarter of 2026, even as the broader company posted losses. Analysts increasingly see Starlink — not rockets — as the core justification for the giant valuation being sought.

### Musk will retain control

One of the biggest governance takeaways is that Musk will continue exercising near-total control over the company even after listing. He currently has 85% of voting power through super-voting shares. For traditional governance advocates, this is a red flag. But for many retail investors and Musk loyalists, his dominance could be an attraction.

SPORT

## How Pep Guardiola unmade and remade English football at Manchester City

Sandip G  
New Delhi, May 26

BEYOND A doubt or dispute the greatest manager on English shores since Alex Ferguson, Pep Guardiola's influence lives beyond the trophies he hoarded. His ideas and intelligence, vision and wisdom, defined and shaped the English game, and left it a vastly different product to the one he found when he joined Manchester City.

### Busting the physicality myth

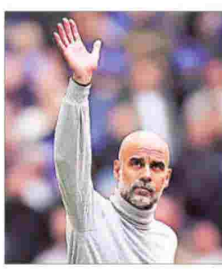
The robust musculature of the players in the league intrigued that intimidated Guardiola in his first year. In his first year, the midfield trio of Ferdinandinho, David Silva, and Kevin de Bruyne was judged unimposing, soft, and without the power and personality that defined the league's famed talents. "I need to adjust," he said after the first season, watching long balls and set pieces scurry through his defence.

Paradoxically, in the decade that unfolded, English football adopted the virtues

of Guardiola than Guardiola adjusted to the rigours of the Premier League. The league loved the free-spirited, risk-prone, solo artist midfielders. Guardiola emphasised control. All his midfielders fell into the category of "control midfielders".

He stayed firm in his dogma, making the odd alterations. He designed a midfield rule-book that put spatial awareness and manipulation, technique and tact, above muscle and brawn, as the guiding principles. In the second season, he bought another short-midfield virtuoso in Bernardo Silva. The Silva pair formed the heartbeat of City's 100-point season (2017-18). Both the Silvas became the ideological core of Manchester City. By then, Guardiola had long banished tiki-taka, but pass remained the fundamental. A well-constructed pass, Guardiola instructed, was more rewarding than a flying tackle. "I don't train tackles," he would famously say.

As he launched the City dynasty, which claimed the treble (2022-23) and lifted four titles in a row (2020-21 to 2023-24), the rest



Outgoing Manchester City manager Pep Guardiola. AP

merely stood in awe and aped, stacking midfield with technicians rather than disruptors, condemning physicality to a sym-

bol of its savage past.

### Positional play, flexibility

Positional play was everything, yet positions were not everything. He emphasised on what he called *juego de posición*, built on the positions and movements of players rather than sterile possession. It's not a definite playing style, but what Guardiola terms as "finding superiorities" by creating a free man, often in advanced positions. He dismantled the perceived notions of a designated role — rather, the supposed duties of a role. Reinventing the false nine in Barcelona, thus shaping arguably the greatest footballer of this century in Lionel Messi, would be his immortal legacy.

In England, the modifications were subtler, but with arresting influence. Morphing centre-back John Stones into an auxiliary midfielder was the stroke of a tactical wizard. He was the pass-master of City's treble-winning season, "Barnsley Beckenbauer" as he was nicknamed. Stones later said in his tribute to Guardiola: "He made

me understand football." Several young and ambitious managers of this era would parrot the same.

Under him, full backs tucked into the midfield to create numerical overloads and through clever positioning, territorial superiority. They overlapped, thrust upfront and play-made. The Portuguese full-back João Cancelo was playfully dubbed "false playmaker" for his then progress far into the opposition box, assumed central channels, scored goals, and assisted the forwards. His goalkeepers were excellent ball distributors, sometimes assist-providers and were solid with the ball. Every move originated from Ederson, the Brazilian powerhouse.

### Challenging his own ideas

Perhaps his biggest legacy — to not only the Premier League but also world football — is his openness to revisionism. He made, remade, and unmade his own strategies. In the first few seasons, he heavily relied on inverted midfielders sliding into mid-

field, but when it became predictable and others began to copy, he reverted to a flat four at the back. He created the box-midfield with two free-roaming No 8s (box-to-box midfielders) and two midfield pivots. Later, he reverted to a mini diamond, with the emergence of Rodri.

In the 2020-21 and 2021-22 seasons, he played a false nine. But he flipped the template and then won the league with classical No 9 (centre forward) in Erling Haaland.

The last two years were marked by an ideological rethinking, when he embraced a more direct approach, with pacy wingers and dribblers, an orthodox shot-stopper, and fast breaks. Not all his alterations were for the sake of it, but forced by circumstances, injury or loss of form. But he made those work.

All great managers adapt and change, but few have constantly self-amended and evolved like Guardiola. So much so that the only constant in his ceaseless tactical innovations has been change.

CLIMATE

## In warming India, local data monitoring is key



EXPERT EXPLAINS  
Y NITHYANANDAM

HEAD, GEOSPATIAL RESEARCH PROGRAMME, TARKSHASHILA INSTITUTE, BENGALURU

MANY PARTS of India are in the grip of a scorching heatwave. On heat maps, large sections of the country are seen covered in flaming red and orange colours.

### What do heat maps indicate about India's summer?

The deep reds and oranges seen in temperature maps represent regions experiencing elevated land surface or near-surface air temperatures, depending on the dataset used. In climate science and geospatial analysis, such colour gradients are commonly used in satellite observations, weather station data and numerical weather models' outputs to indicate the intensity and spread of heat visually.

The current heat pattern over northwest and central India and parts of Pakistan is partly a regular seasonal phenomenon and partly an intensified heat wave situation. During April and May, these regions naturally experience extreme heating due to high solar radiation, dry continental winds, low soil moisture and the formation of seasonal low-pressure heat zones over Rajasthan and Pakistan.

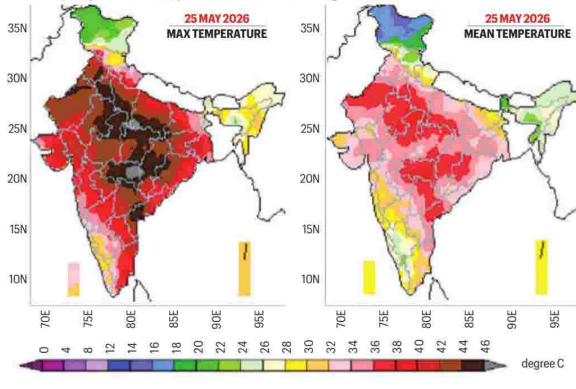
What is concerning is the intensity, persistence and large spatial extent of the heat. Temperatures are abnormally high over prolonged periods with limited nighttime cooling. Reduced pre-monsoon rainfall, persisting dry air circulation, extensive land surface warming and Urban Heat Island effects (concrete, roads, etc. radiating the heat they absorb) are amplifying the situation.

Climate change is also acting as a background stress multiplier. While heat waves are not new to India, rising baseline temperatures are increasing their frequency, duration and severity.

### How are such maps generated?

All maps showing temperature values are not computed using the same method. First, some are simple interpolations of air temperature data measured by weather

### IMD's temperature maps show India is feeling the heat



stations observed at certain points, scaled to cover the entire area of interest. The finer the observation network, the better the accuracy. These stations come from government agencies, private networks, etc.

Second, remote sensing captures temperature over larger areas through thermal sensors aboard satellites. These measure surface skin temperature, specifically the energy radiated from the ground, which is then translated into surface temperature estimates through physical relationships between emitted radiation and temperature.

This has become a widely used tool since the early 1980s, with global daily coverage expanding significantly after 2000, thanks to sensors like the Moderate Resolution Imaging Spectroradiometer (MODIS) and Landsat thermal sensors.

Third, air temperature values are calculated using numerical weather model simulations. These ingest data from ground stations, satellite-derived land surface temperatures, humidity, solar radiation, cloud cover, rainfall patterns, soil moisture, land use, and topography.

The key advantage is predictive capability, between four and 15 days, depending on the model. Platforms like Windy.com use the European Centre for Medium-

### Likely to rise more

While heat waves are not new to India, rising baseline temperatures are increasing their frequency and severity.

### Heat wave frequency in India has been rising since 1961, with projections indicating a rise of 12 to 18 days under continued warming trajectories.

Range Weather Forecasts (ECMWF) and the Global Forecast System (GFS), the most popular models.

The ECMWF's Integrated Forecasting System runs deterministic forecasts up to 15 days. The India Meteorological Department (IMD) operates its own Numerical Weather Prediction suite based on an India-adapted GFS and ingests ECMWF data for heat wave guidance and extended-range forecasts.

### What is driving India's rising heat?

On the global side, two factors stand out. First, El Niño conditions are developing in the equatorial Pacific. It is a climate phenomenon marked by changes in sea temperatures along the eastern Pacific Ocean, coupled with atmospheric fluctuations.

The IMD has already projected the 2026 southwest monsoon at 92% of the long-period average (below normal), with El Niño as a primary driver.

Second, long-term anthropogenic warming is steadily raising baseline temperatures. Heat wave frequency in India has been on a consistent upward trend since 1961.

Local factors determine how that heat is felt. In urban areas, the Urban Heat Island ef-

fect, driven by dense infrastructure, vehicles, air-conditioning, and industries, makes cities measurably hotter. In rural areas, forest fires, biomass burning, and barren exposed landscapes amplify surface heating.

The heat we experience is never due to a single factor, and ground-based observations often remain the most reliable measure of local heat stress.

### How is extreme heat affecting people?

The most immediate impact is the decline in productivity. Daily wage workers, construction labourers, street vendors, and gig workers cannot avoid heat exposure because their livelihoods depend on physical presence. Economic compulsions override precautionary advisories, making this a social vulnerability as much as a climatic one.

Heat stress also disproportionately affects those in informal settlements. Heat also aggravates comorbidities like cardiovascular disease, respiratory illness, and diabetes, and in severe cases leads to heat exhaustion, heat stroke and death. Heat-related mortality remains significantly underreported due to the complexity of direct attribution.

Ecologically, rising temperatures dry out vegetation, reduce water availability, and stress wildlife and livestock. Prolonged heat and drought conditions create fire-prone landscapes, making forest fires more frequent and intense, which in turn further amplify local surface temperatures.

### How can data improve mitigation?

Data must distinguish between global climatic drivers and local heat sources, to help explain how climate change interacts with urbanisation, land-use changes and local environmental conditions. This can enable targeted interventions.

Heat behaviour is highly location-specific and a strategy that works in one city may not work elsewhere. This is why India requires denser weather station networks and improved thermal-monitoring systems.

There is also an urgent need for dedicated thermal payloads and thermal remote sensing systems to continuously monitor land surface temperatures, identify heat hotspots, study forest fires and understand localised thermal behaviour.

More research and development are required to identify mitigation strategies that work for specific local conditions. Parallel efforts are equally necessary to minimise anthropogenic heat sources through better environmental management, urban planning and energy-use practices.

POLICY

## Delhi Gymkhana Club row: The rules governing land in the capital

Damini Nath  
New Delhi, May 26

LAST WEEK, the Union Ministry of Housing and Urban Affairs's Land and Development Office (L&DO) wrote to the Delhi Gymkhana Club, asking it to vacate its leased premises on Safdarjung Road by June 5.

The government wanted the 27.3-acre plot back for "strengthening and securing Defence infrastructure", but the decision has kicked off a controversy.

### Colonial origins

The club has its origins in 1913, soon after the British Indian government decided to move the capital from Kolkata to Delhi in 1911. The land was leased by the government to the Imperial Delhi Gymkhana Club in 1928, and the buildings were constructed in the 1930s.

According to official documents, the lease was perpetual, meaning that no fixed time frame was attached to it. Initially meant for British officials, the club later became a space for members of the Indian bureaucracy, judiciary and armed forces,

among others.

The club's website states that the building was designed by architect Robert T Russell, who also designed Connaught Place and the Commander-in-Chief's residence. The latter became known as Teen Murti — the residence of Prime Minister Jawaharlal Nehru.

Located at 2, Safdarjung Road, the club was renamed the Delhi Gymkhana Club after 1947.

### Land administration in Delhi

After 1947, the Union government came to administer the land in Delhi through its L&DO. It allots land for the development of residential colonies, institutions, clubs, political parties, etc., and administers leases. The leases can be for a fixed period, like 99 years, or perpetual in nature.

The lessee pays a fixed ground rent for the land, which can be periodically revised. Over the years, more than half of the residential properties have been granted freehold status by the L&DO, meaning the ownership status changes to grant full rights. In fact, out of around

### Authority at Centre

#### After 1947, the Union government came to administer the land in Delhi through its Land and Development Office.

It allots land for the development of residential colonies, institutions, clubs, political parties, etc., and administers leases.

60,000 properties on L&DO land, around 35,000 had been converted from leasehold to freehold as of 2021, according to the CAG report that year.

### Current controversy

In its May 22 letter to the club, the L&DO cited clause 4 of the lease that allows the government to "re-enter" the land for a "public purpose".

"It has been determined that the said premises, located in a highly sensitive and strategic area of Delhi, is critically required for the strengthening and securing of Defence infrastructure and other vital public security purposes. The land is essential to fulfil urgent institutional needs, governance infrastructure, and public-interest projects, integrated with the resumption of adjoining government lands," the L&DO said.

The land is located next to the Prime Minister's residence on Lok Kalyan Marg, The Slums on Race Course Road, which are the adjoining government lands referred to in the letter, are currently being cleared of encroachments by the L&DO, pointing to a larger plan for the area.

"Under Clause 4... it is expressly provided that: 'If the demised premises or any part thereof are required for a public purpose then and in such case it shall be lawful for the Lessor... to re-enter and thereupon this demise and everything contained therein shall cease and determine...'" the L&DO said.

Since 2022, the club has been run by a government-appointed general committee on the orders of the National Company Law Tribunal. The Corporate Affairs Ministry approached the NCLT seeking regulation of the club, which is a registered company under the Companies Act, 1956, alleging that it was being run in violation of norms and mismanaged.

On the latest issue, the club's general committee met on May 23 and decided to write to the L&DO asking it to consider that there should be "no dislocation of the club". The committee said the club's 14,000 members, who have been paying fees regularly, and 500 employees would be impacted by the L&DO's decision. Multiple petitions filed by members and employees of the club were heard in the Delhi High Court.

# The Big Picture

14

WEDNESDAY, MAY 27, 2026

IT WAS on a bumpy bus ride to Mumbai in 2021 that the 13-year-old girl finally broke her silence. Her marital arts teacher, she told her mother, had allegedly assaulted her during a trekking trip, threatening to strip her of her black belt if she spoke.

The revelation had come after weeks of turmoil — the mother discovering her daughter's pregnancy, followed by secretive hospital visits for a discreet abortion. That day, 27 weeks pregnant, the girl and her mother were on their way to Mumbai's state-run JJ Hospital. What followed were a series of delays, shame and court-ordered relief for termination of her pregnancy — and the trauma of delivering a stillborn foetus.

The girl's story, one of the many marked in court petitions and police logs, spotlight the fraught terrain of medical termination of pregnancy (MTP), where a woman's trauma collides with legal timelines, social stigma and medical risks. Over the years, High Courts across the country and the Supreme Court have been witnessing a steady inflow of cases seeking judicial intervention by women for abortions in pregnancies that may have crossed the statutory limit of 24 weeks.

These rulings, often ad hoc and based on the peculiarities of individual cases, have triggered debates on the right to life, often pitting the unborn child against the woman's rights.

At the heart of the latest debate is a Supreme Court ruling in April, which allowed a minor rape survivor to terminate a 30-week pregnancy, prioritising her "reproductive autonomy" over foetal viability.

The government and the doctors at India's premier hospital, the All India Institute of Medical Sciences (AIIMS), challenged the ruling multiple times, arguing that since there were no anomalies in the fetus and the option of adoption could be exercised, there was no need for an MTP of an advanced pregnancy.

The apex court countered that forcing a girl — especially a minor — to carry an unwanted pregnancy to term inflicts deeper trauma, regardless of consent debates or criminal complaints. "This is a case of child rape. The victim will have a lifelong scar and trauma. It is now a fight between the fetus and the child. The child must survive, and she must have a dignified life..." Chief Justice of India Surya Kant observed on April 30.

Despite the court's firm rejection of the government's plea, doctors at AIIMS and the government eventually counselled the parents to allow the minor to deliver the foetus. The journey of many of these women tells the tale of why they choose to knock on the doors of justice at the highest levels, despite insurmountable odds and knowing that any relief from the court will be a pyrrhic victory.

This, despite the fact that in India, reproductive autonomy — the right to decide if, when, with whom, and how to have children — is a fundamental right. The Supreme Court has in multiple judgments recognised that the right to life and liberty under Article 21 of the Constitution includes the right to reproductive autonomy — the right to make "reproductive choices... to procreate as well as to abstain from procreating."

In February 2026, allowing the termination of a 30-week pregnancy of a woman who was a minor when she conceived, Justice B V Nagarathna of the Supreme Court said, "If the interest of the mother is to be taken note of, then her reproductive autonomy must be given sufficient emphasis. The Court cannot compel any woman, much less a minor child, to complete her pregnancy if she is otherwise not intending to do so..."

## The law and the redlines

Weeks before the 13-year-old from Konkan and her mother walked into the teeming corridors of JJ Hospital, they had done everything they could to arrange for a discreet abortion for the girl, the family told *The Indian Express*. The minor's mother even planned to take her to Gujarat after learning that an unqualified doctor facilitated such abortions. She spent over a week searching for the quiet, but nothing worked and someone suggested Mumbai. The mother was worried about the stigma they would face in a government hospital but by then, they were desperate — the girl was nearly 27 weeks pregnant, three weeks above the limit set by law for minors and victims of rape.

Finally, the mother and daughter made the journey to JJ Hospital.

The law on abortion in India stems from the colonial-era framework for punishing "voluntary miscarriage". The Bharatiya Nyaya Sanhita, the penal code that replaced the colonial-era IPC in 2024, also criminalises voluntarily causing miscarriage — even when the miscarriage is with the pregnant woman's consent, except when the miscarriage is caused to save the woman's life.

The Medical Termination of Pregnancy (MTP) Act, however, provides statutory exceptions, permitting abortion in specified circumstances.

Experts point to the language in which the law is framed to say that it addresses the medical fraternity, not the reproductive autonomy of the woman, when it tells doctors when they can carry out an MTP.

According to the MTP Act, a doctor can perform an MTP procedure for pregnancies up to 20 weeks. Yet, women often endure significant social and legal barriers, with medical practitioners routinely requiring spousal or parental consent and extensive paperwork.

For pregnancies between 20-24 weeks, MTP requires the opinion of two

## THE ABORTION DEBATE

# After 20 weeks

At the heart of a string of recent petitions by women seeking abortions beyond the legal limit of 20 weeks, is a difficult question: whose rights prevail? The woman's reproductive autonomy or the unborn child's right to life? **OMKAR GOKHALE & APURVA VISWANATH** on what happens when the woman's trauma collides with legal timelines, social stigma, medical risks and ethical and moral dilemmas

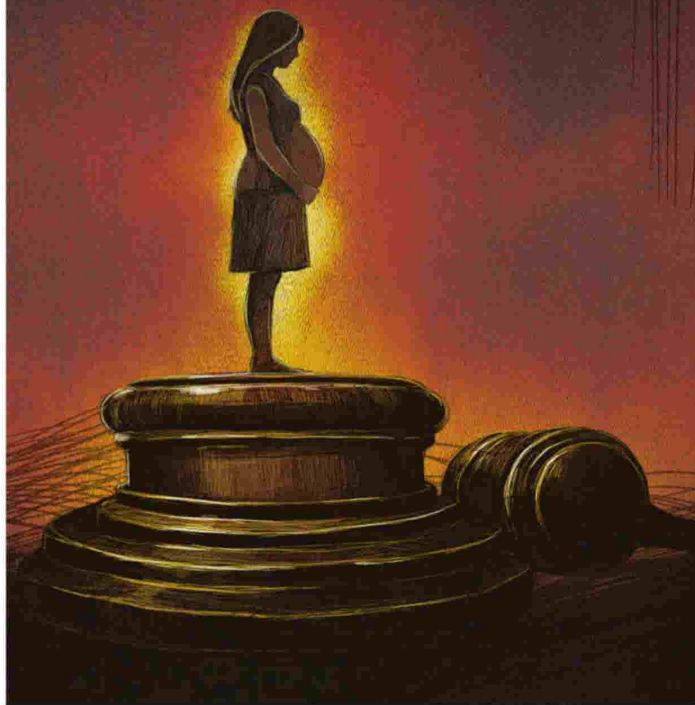


ILLUSTRATION: SUVARIT DEY

Many of these women choose to knock on the doors of justice at the highest levels, despite insurmountable odds and knowing that any relief from the court will be a pyrrhic victory

In a number of recent cases, the Centre and AIIMS have advocated for carrying the foetus to full term, followed by an adoption. It's a position that's usually unsympathetic to the petitioner

which is usually where the High Court sets up the medical board for MTP cases.

The Investigating Officer (IO) in the case says the family's financial and emotional condition was too precarious for them to seek legal help, and they had to be counselled for the MTP. "The girl was not able to understand the ordeal she was going through. After the complaint was filed, the parents left for work. They were daily wagers and had other children to look after. So we put the child up at the government hostel for three months. In such cases, the court says the IO is the guardian. However, the consent of the parents was required for an MTP. We had to counsel them to explain how MTP was important for her health," the officer said.

The medical board that examined the girl found a strong possibility of a live birth even after the MTP procedure, given the advanced stage of pregnancy. There was also the possibility of long-term neurological complications in the newborn, they said.

The court, therefore, did not find it fit to terminate the victim's pregnancy and ordered that, after full-term delivery, adequate measures can be adopted with the consent of the victim and her parents for taking care of the newborn.

The petitioner then approached the Supreme Court, which did not find any infirmity with the High Court order.

The petitioner's lawyer finally asked the court that they be allowed to move the High Court again to address the issue of safe delivery with the State's aid in a neutral surrounding since the family was facing "an unpleasant social situation in the locality where they reside".

After the birth, the child was sent for adoption. Advocate Ashley Cusher, who appears frequently in MTP cases, says lawyers typically charge only filing fees, ranging from Rs 5,000 to Rs 20,000 from victims, yet the stigma of moving court forces many women to get rid of the pregnancy through discreet, and often risky, means. "They approach unqualified persons for abortions, spending Rs 50,000 to Rs 1 lakh. However, they do not realise it can be fatal," he said.

## Foeticide vs agency

While in the cases of minors and sexual assault survivors, courts and lawyers cite legal precedent to argue for MTP, the fate of women who have other personal reasons for seeking an abortion can depend on the whim and views of individual judges and benches.

In 2022, for instance, a Delhi High Court bench denied abortion for a 25-year-old woman from Manipal who was 23 weeks pregnant. She was in a consensual relationship, but with her partner refusing to marry her, she wanted to terminate her pregnancy.

Here, the bench took a conservative position, saying, "We will not permit you to kill the child; 23 weeks are over. The child will be in the womb for how many weeks for a normal delivery? Hardly how many weeks are left? Give the child to somebody in adoption. Why are you killing the child?"

The law allows a change in marital status as a ground for abortion for pregnancies between 20-24 weeks, but a live-in relationship short of marriage did not qualify for the exemption.

When women seek late-stage abortions, law officers of the Centre, judges and the medical fraternity have at times suggested an alternative: carrying the foetus to term and placing the infant for adoption.

However, legal experts argue this 'option' misunderstands the emotional weight involved. "The trauma of childbirth and having to live with that knowledge cannot be pitched as an alternative to the anonymity of the abortion process," said senior advocate Colin Gonsalves. The distinction, he says, is that while an abortion allows a woman to move on with her life, giving up a child introduces an entirely different burden: a lasting uncertainty about the child's fate and future, one that does not fade with time.

Yet, in a number of recent instances, the Centre and AIIMS have advocated for carrying the foetus to full term, followed by an adoption. It's a foetus-centric position that's usually unsympathetic to the petitioner.

In July 2025, when the Delhi High Court allowed a 16-year-old minor rape survivor to undergo an MTP, AIIMS moved an appeal arguing that allowing the termination of a pregnancy of a minor rape survivor at over 27 weeks would be "akin to foeticide". After a division bench of the court "suggested" to the victim's mother to consider the Centre's stand, it was agreed that the minor shall carry the pregnancy to full term.

In 2023, when a married woman sought a late-stage abortion on the grounds of her mental health, the Centre advised her to proceed with a preterm delivery and said the state would manage adoption and long-term care. In this case, when the Supreme Court allowed termination despite objections from AIIMS, the doctors came back seeking a "specific direction" to "stop foetal heartbeat".

Although the question by AIIMS was framed as an ethical conundrum, the procedure for stopping foetal heartbeat is the standard method for terminating pregnancies in advanced stages in India. A 2017 set of guidelines by the Ministry of Health and Family Welfare recommends "2-3 ml of strong (15%) potassium chloride injection in the foetus prior to termination" as the standard operating procedure.

Given the uneven interpretation of the law in many of these rulings, what shapes a woman's agency and reproductive autonomy are often factors far beyond her control — the opinions of doctors, government lawyers, judges, society.

## Abortion laws elsewhere



### USA

In June 2022, the US Supreme Court overturned *Roe v Wade*, its 1973 decision that had established a constitutional right to abortion. As a result, individual states now have the authority to permit, restrict, or ban abortions



### CANADA

Abortion is permitted at all stages of pregnancy, irrespective of reason, and is treated as "healthcare service". In 1988, Canada's Supreme Court set aside a federal law banning abortions, reasoning that it violated a woman's "right to life, liberty and security..."



### GERMANY

Abortion is classified as a criminal offence, but is permitted within the first 12 weeks of pregnancy and the woman must attend mandatory counselling at approved centres



### FRANCE

Most European countries permit abortions, within gestational time limits, on request. In 2024 France passed a bill explicitly guaranteeing women's right to voluntarily terminate pregnancy. Gestational limit for abortion on request in France is 14 weeks of pregnancy

## What the law on abortion says

**UP TO 20 WEEKS:** A registered doctor can terminate pregnancy

**20-24 WEEKS:** Two doctors must clear the abortion and it can be allowed only for rape/sexual assault/incest survivors, minors, in case of change in marital status during pregnancy, among others

**> 24 WEEKS:** A medical board reviews case of substantial foetal abnormality or risk to the woman's life/physical/mental health; court decides on the plea after examining board's opinion

doctors and can only be done in certain cases — for survivors of sexual assault or rape or incest; minors; when there is a change of marital status during the ongoing pregnancy (widowhood and divorce); among others.

But even for women who qualify under this provision, this often means having to endure lengthy medical evaluations, delays in securing doctors' approvals, and, in many cases, the uncertainty and trauma of approaching courts once the pregnancy advances further.

The lawyer of the minor from Konkan told *The Indian Express* that in her case, the appointment of para-legal volunteers to assist the victim with the paperwork and other procedures at the hospital, as is required by law, was not done, leading to unnecessary anxiety and chaos for the minor and her mother, who were already in a "vulnerable and distressed state", and caused delay in the process.

Beyond 24 weeks, a pregnant woman's only option is to move the courts. High Courts or the Supreme Court usually direct

a medical board to be set up by the state government to determine whether the termination of pregnancy is feasible, after assessing any foetal abnormality or whether the pregnancy poses a risk to the woman's life, physical or mental health. Based on the medical assessment, courts make a determination to allow or disallow an MTP.

Back in JJ Hospital, the minor and her mother learned about the procedure to terminate the pregnancy. The family contacted a lawyer, referred by the doctors, who helped them approach the Bombay High Court. The court, after two hearings, ordered an abortion. The MTP was carried out, and the child was stillborn.

However, the family's journey was one of agonising delays that left the minor in physical pain and the weight of whispers and shame. The mother said that after the court intervention, living in the same village was impossible, and they had to move to a chawl in a nearby town.

## Walking through lawyer's door

The decision to opt for an MTP is com-

plexed and vexing. A minor girl who did not understand what was happening to her body; an unmarried woman who kept the pregnancy hidden from her family, fearing she would be thrown out of her home; or even a married woman, realising she cannot continue her second pregnancy when she has not fully dealt with postpartum depression from the first childbirth. This pattern repeats in petitions to various courts by women or their family members.

By the time most of these women walk through a lawyer's door, they are in their sixth or seventh month of pregnancy. Every additional week of delay means a harder and riskier procedure (in the event of the court ruling in the woman's favour). In remote or tribal districts, geography and social factors compound the delays.

In Thane district's tribal region, a 15-year-old, the daughter of brick kiln workers, faced another battle. Pregnant for 30 weeks after being sexually assaulted by the owner of the kiln, she was admitted to a hospital in Thane as the family couldn't afford the travel to Mumbai's JJ Hospital,

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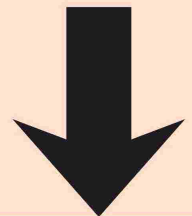
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TATA SONS BOARD MEET: AI, TATA DIGITAL UNDER SCANNER

## Loss-making Tata ventures reviewed

George Mathew  
Mumbai, May 26

THE BOARD OF Tata Sons on Tuesday reviewed turnaround strategies and business transformation plans for several of the \$180 billion group's loss-making ventures as the conglomerate seeks to strengthen growth while containing mounting losses across key businesses, with reviews indicating that Air India and Tata Digital are expected to continue reporting losses for the next three years.

According to sources familiar with the discussions, chief executives of major unlisted companies under the Tata Group umbrella, including Air India, Tata Digital and Tata Electronics, made detailed presentations before the board.

The presentations, attended by Noel Tata and other Directors, focused on long-term business strategies, operational restructuring, revenue expansion and capital requirements for the coming years. Sources indicated that the meeting primarily centred on the financial performance and future roadmaps of these companies, many of which are in investment-heavy phases. However, there was no discussion on the listing of Tata Sons or any extension of the tenure of Chairman N Chandrasekaran, whose current term has often been the subject of market speculation.

The Tata Sons board is expected to convene again on June 12 for further deliberations on the group's strategic priorities and funding plans. Among the companies reviewed, Air India and Tata Digital are expected to remain under financial pressure over the next three years. Air India, which is undergoing an extensive transformation programme, continues to face significant costs related to fleet modernisation, integration, operational restructuring and service upgrades. Tata Digital, which has been investing heavily in building digital commerce and consumer plat-



There was no discussion on the listing of Tata Sons or on the extension of Chairman N Chandrasekaran's tenure. REUTERS

forms, is also projected to post losses as it expands its ecosystem and scales operations. Losses of unlisted units are expected to touch Rs 29,000 crore for the financial year 2026 (FY26). Air services disruption and the rise in fuel costs in the wake of the West Asia conflict have impacted airlines in India, including Air India.

In contrast, Tata Electronics emerged as a bright spot among the group's unlisted entities. The company is rapidly expanding its manufacturing and semiconductor-related operations and is expected to cross revenues of more than Rs 1 trillion in FY26.

The company is also likely to turn profitable, aided by strong demand, capacity expansion and strategic investments in India's electronics manufacturing sector, said a source.

Despite these positives, concerns remain over the financial burden posed by Air India and Tata Digital.

"Both companies will continue to weigh on Tata Sons financially for the foreseeable future," a source said, adding that it's unclear how the group plans to fund the sustained capital requirements of these businesses in the years ahead.

The board meeting on June 12 is likely to take up the extension of tenure of Chandrasekaran. On February 24, the outcome of the Tata Sons board meeting took an unexpected turn when Noel Tata surprised fellow directors by questioning

the losses incurred by several unlisted companies within the conglomerate. Although the Tata Trusts trustees had already agreed to extend Chairman Chandrasekaran's tenure for a third five-year term, Noel Tata emerged as a demanding voice during the meeting, raising multiple concerns and setting several conditions before backing the extension.

While four Tata Sons directors supported the renewal and were prepared to put the matter to a vote, Chandrasekaran opposed deferring the decision. He apparently supported the view that key decisions at Tata Sons should continue to be based on consensus, a tradition closely associated with the late Ratan Tata. In effect, Noel Tata's endorsement is crucial before moving ahead with the extension.

Ahead of the Tata Sons board meet, the board of Tata Trusts — excluding the Sir Ratan Tata Trust (SRTT) — is expected to meet on June 8 to deliberate on a broad set of governance and strategic issues.

Among the key matters expected to come up for discussion is the future of Venu Srinivasan's role as a nominee director on the board of Tata Sons. The review assumes significance because Srinivasan had reportedly diverged from the stance adopted by the Tata Trusts by supporting the view that Tata Sons should become a listed entity.

## Will critical minerals treaty with US bring investments?

Pratyush Deep & Ravi Dutta Mishra  
New Delhi, May 26

MONTHS AFTER the US announced India's inclusion into the Paris Pact, a Washington-led initiative to counter China's dominance in new age sectors such as artificial intelligence (AI), India and the US on Tuesday signed a bilateral India-US Critical Minerals Framework.

It focuses on securing the supply, mining, and processing of critical minerals and rare earth elements.

External Affairs Minister S Jaishankar, after the Quad for foreign ministers' meeting, said that the new framework aims to deepen cooperation between the two countries across the entire critical minerals and rare earth supply chain, including mining, processing, recycling, and related investment.

While details on the framework are awaited, this signalling of future cooperation comes after the Indian industry began facing shortages of rare earth magnets late last year, when China launched a licensing regime, effectively choking exports of rare earth elements during its trade war with the US.

India has little processing capacity and is 100% import-dependent for some key critical minerals such as cobalt, lithium, nickel, rare earth elements (REEs) and silicon. It has been aggressively expanding collaborative efforts.

China so far controls almost 90% of global critical mineral processing, which gives it an edge in the sector.

### Regulatory push to attract investments

As part of efforts to attract investment in strategic sectors like critical minerals, the government made its first approval of a regulatory framework for Indian entities receiving investments from LBCs in April 2020. The changes, introduced through a document known as Press Note 3 or PNC, were to curb potential takeover of local companies during the slump in equity valuations around Covid-19.

To fast-track decisions on investment proposals from LBCs, the government announced that applications from "specified sectors", such as capital goods, electronic capital goods, electronic components, polysilicon, ingot-wafer and rare earth magnets, shall be processed and decided within 60 days.

However, such cooperation aimed at attracting investments to particularly address strategic vulnerabilities has not yet benefited India. It saw gross FDI inflows rise to a new record high of \$94.53 billion in 2025-26, up 17% from the previous year, although the net figure was a mere \$7.65 billion, data released last week by RBI showed. Notably, inflows had risen sharply in February on the back of global investor sentiment reversing in the

wake of the signing of an interim trade deal between India and the US early that month, which eliminated the penal 25% tariff and reduced the reciprocal tariff to 18% from 25%. FPIs had also net bought Indian financial assets in February to the tune of \$4.7 billion. However, once the West Asia war began at the end of February, foreign capital has exited Indian shores in droves: \$13.6 billion in March, \$7.56 billion in April, and \$2.62 billion so far in May.

### India-US bilateral efforts on critical minerals

Cooperation on critical minerals also figured prominently during Prime Minister Narendra Modi's official visit to the United States in February 2025. Under the India-US TRUST ("Transforming the Relationship Using Strategic Technology") initiative, both countries agreed to strengthen trusted and resilient supply chains in sectors such as semiconductors, critical minerals, advanced materials, and pharmaceuticals. "Recognising the strategic importance of critical minerals for emerging technologies and advanced manufacturing, India and the United States will accelerate collaboration in research and development and promote investment across the entire critical mineral value chain, as well as through the Mineral Security Partnership, of which both the United States and India are members," the India-US joint leaders' statement read.

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## First LNG tanker via Strait of Hormuz reaches Indian coast



The cargo is about a day's worth of India's LNG imports. REUTERS REPRESENTATIONAL IMAGE

Sukalp Sharma  
New Delhi, May 26

A LIQUEFIED natural gas (LNG) tanker that crossed the Strait of Hormuz over the weekend arrived at Gujarat's Dabhol on Tuesday, marking the first LNG cargo to reach India from the Persian Gulf in over two-and-a-half months of the strait's effective closure due to the West Asia war, ship tracking data shows.

The Liberia-flagged tanker Al Hamra, carrying about 62,000 tonnes of LNG from Abu Dhabi National Oil Company's (ADNOC) Das Island export facility in the Persian Gulf will be discharging its cargo at Petronet LNG's Dabhol terminal, the largest LNG import terminal in India.

As of 2 PM Tuesday, the tanker was stationed at one of the LNG discharge jetties of the Dabhol terminal, according to data and visuals from ship tracking and maritime intelligence firm MarineTraffic.

As per trade sources, the cargo belongs to government-

owned gas major GAIL. While the cargo is equivalent to about a day's worth of India's LNG imports, Al Hamra's arrival has built hopes for more LNG supplies coming to India from the Persian Gulf, which lies to the west of the strait.

According to commodity market analytics firm Kpler, Al Hamra is one of three LNG tankers that crossed the critical maritime chokepoint over the weekend despite elevated geopolitical risk.

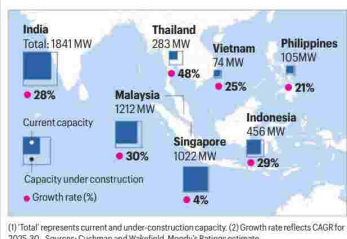
The other two tankers—Fuwhai and Al Rayyan—carried QatarEnergy cargoes bound for Pakistan and China, respectively. In the nearly three months of the West Asia conflict, only seven vessels laden with LNG are estimated to have transited the strait. While about one-and-a-half dozen liquefied petroleum gas (LPG) and oil tankers have made their way to the Dabhol terminal, according to data and visuals from ship tracking and maritime intelligence firm MarineTraffic.

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### INDIA'S DATA CENTRE BOOM

- India and Singapore are the largest data centre markets in South and Southeast Asia, a region which accounts for over 3.5 GW of data centre operational capacity.
- Moody's Ratings expects the region's capacity to grow at a compound annual growth rate

- (CAGR) of 24% over the next four to five years, subject to power and permitting constraints.
- Indonesia is shifting to India and growth is surging rapidly expanding domestic demand, and to Malaysia, which also benefits from spillover demand from Singapore.



(1) Total represents current and under-construction capacity (2) Growth rate reflects CAGR for 2025-30. Sources: Cushman and Wakefield, Moody's Ratings estimate

## Adani inaugurates world's largest battery storage outside China

George Mathew  
Mumbai, May 26

ADANI GREEN Energy Ltd (AGEL), India's largest renewable energy company, has commissioned a cumulative 3.37 GWh battery storage deployment outside China.

The deployment includes the 1.37 GWh capacity commissioned in March 2026, taking AGEL's total operational BESS capacity at Khavda, Gujarat to 3.37 GWh.

The commissioning is a big milestone in strengthening grid reliability, peak-hour supply and enabling renewable energy to deliver dependable, round-the-clock power at scale, it said in a statement. AGEL plans to add over 10 GWh of battery storage capacity in FY27 and scale this to 50 GWh over the next five years.

"AGEL's 3.37 GWh BESS can store enough clean energy to power nearly one million homes for an entire day, supporting peak electricity demand of cities like Indore, Chandigarh or the entire state of Goa," it said. FUL REPORT ON  
WWW.INDIANEXPRESS.COM

## AAIB prepares interim report as Air India crash anniversary nears

Reuters  
New Delhi/Montreal, May 26

INDIAN OFFICIALS investigating last year's deadly Air India crash are preparing an interim report rather than a final one ahead of the anniversary of the Boeing 787 accident that killed 260 people, said a person with direct knowledge of the matter.

The interim report from India's Aircraft Accident Investigation Bureau (AAIB) will be "more comprehensive" than the preliminary report put out last July and will examine possible primary causes and other contributing factors, the person said. The 15-page preliminary report into the aviation industry's deadliest disaster in a dec-

ade showed the Dreamliner's engine fuel switches flipped almost simultaneously and starved the engines of fuel shortly after the flight from Ahmedabad to London took off on June 12, 2025.

A cockpit recording of dialogue between the two pilots supported the view that the captain cut the flow of fuel to the plane's engines, according to US officials' early assessment reported by Reuters last year. The AAIB said at the time it was "too early to reach any definite conclusions."

By releasing an interim report, Indian authorities will not be required to share the findings ahead of time with the US National Transportation Safety

Board (NTSB), which is participating in the investigation because the aircraft was designed and manufactured in the United States.

The NTSB would be allowed to comment on a final report, which could also provide more closure for the crash victims' family members.

A second source with knowledge of the matter also said investigators were still working on the probe and needed more time. Both sources spoke on condition of anonymity as the internal workings of the investigation are private.

Under international rules, a final report is due within a year of an accident.

## Mulling changes to deepen debt markets: SEBI chief

Mumbai: The Securities and Exchange Board of India (SEBI) is currently exploring a host of measures to deepen the debt markets and improve the market architecture to make it more accessible for the retail audience, Chairman Tuhin Kantia Pandey said on Tuesday.

"India's financing model for businesses is still predominantly bank-led. A growing

economy needs patient debt capital. It needs price discovery across tenures and credit profiles. That is why the corporate debt market is central to India's journey of sustained economic growth," said Pandey.

He was speaking at CarEdge Ratings' Debt Summit in Mumbai. ENS FUL REPORT ON  
WWW.INDIANEXPRESS.COM

WARNS THAT AI-DRIVEN AUTOMATION COULD LEAD TO WIDESPREAD UNEMPLOYMENT, INEQUALITY & SOCIAL INSTABILITY IF GOVERNMENTS FAIL TO INTERVENE

## Pope Leo speaks against unchecked AI growth: 5 key warnings issued by him

Soumyarendra Barik  
New Delhi, May 26

POPE LEO XIV has issued one of the strongest warnings yet on artificial intelligence (AI). In Magnifica Humanitas ("Magnificent Humanity"), a 42,300-word document released by the Vatican on Monday, the Pope has called for the "dismantling of artificial intelligence."

Here are the five key takeaways from the document:

### 1. AI should assist humans, not replace them

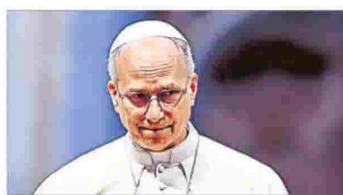
Pope Leo warned against viewing AI as a replacement for human judgment, relationships and creativity.

"Humanity, created by God in all its grandeur, is today facing a pivotal choice: either to construct a new Tower of

Babel or to build the city in which God and humanity dwell together," the pope wrote in the opening section of the document.

The "Tower of Babel" reference comes from the Bible, specifically the Book of Genesis. In the story, humanity tries to build a massive tower that reaches the heavens, symbolising human ambition, pride and the desire to become god-like. In effect, the reference signifies a warning against unchecked human ambition and overconfidence in technology.

The encyclical stressed that technology itself is not evil. But it also warned that technology inevitably reflects the values and intentions of those who design and deploy it. The Vatican argued that AI systems can never fully replicate qualities



In another striking line, Pope Leo said that humanity has never before possessed "such power over itself". REUTERS

### 2. The pope directly targets Big Tech and AI

The pope warned that private firms increasingly possess influence that rivals — and sometimes exceeds — governments. "Today... the main drivers of development are private, often transnational,

parties that are endowed with resources and the capacity to intervene that surpasses those of many governments," the encyclical said.

It added that unchecked technological power risks distorting democracy, public discourse and the "collective imagination." In another striking line, Pope Leo said that humanity has never before possessed "such power over itself."

This critique aligns closely with growing concerns in Europe and elsewhere over the dominance of a few American AI firms controlling the infrastructure, data and computing power needed to build frontier AI systems.

### 3. Mass automation could become a social crisis

Labour rights are central to the encyclical, echoing his

namesake Pope Leo XIII's landmark 1891 encyclical Rerum Novarum, which addressed worker exploitation during industrialisation.

In the latest document, Pope Leo XIV warns that AI-driven automation could lead to widespread unemployment, inequality and social instability if governments fail to intervene.

Work, he wrote, is more than a way of earning income, but "a requirement of the human condition, a normal path toward maturity, development and personal fulfilment."

The pope cautioned against economic systems that treat workers as disposable. He also warned about new forms of "dependencies and societal control," especially through algorithmic manipulation and

### 4. The Vatican wants strict controls on AI warfare

Another major theme is the militarisation of AI. Pope Leo warned that autonomous weapons and AI-assisted warfare risk making violence easier, and less accountable. The pope has called for governments to "slow down" AI development and impose stronger safeguards around military applications.

### 5. AI governance cannot be left to engineers alone

Perhaps the document's broadest message is that AI development is not merely a technical issue, but a moral and societal one. Pope Leo called for a "shared discernment process" involving governments, educators, ethicists, civil society and religious institutions.

"Where are we going? Toward what goal do we wish to orient ourselves?" the encyclical asks. The pope also warned against allowing technological change to be dictated solely by market incentives or em-

ergency-driven policymaking. Among the prominent attendees at the encyclical's presentation was Christopher Orah of Anthropos, who echoed several of the pope's concerns.

FULL REPORT ON  
WWW.INDIANEXPRESS.COM

### MARKETS

Sensex	7600970	-479.26	-0.63%
NIFTY	2391370	-118.00	-0.49%
Gold	₹1,57,611		
US Dollar	\$95.69		
Silver	₹2,66,213		
Oil	\$102.26		

NOTE: GOLD, SILVER RATES AS PER INDIAN BULLION AND JEWELLERS ASSOCIATION DATA. GOLD PER 10G, SILVER PER 1KG. USD OIL (INDIAN BASKET) AS OF MAY 27, 2026

## Quad controls

Shifting US geopolitical priorities are affecting its relevance

The joint statement issued by the Quad foreign ministers' meeting on Tuesday highlighted the 19-year-old grouping's growing struggle for relevance as the focus of the United States (US) foreign policy shifts towards the American hemisphere and West Asia. To be sure, the language of the joint statements issued by the four members — the US, India, Japan and Australia — reflects a genuine effort to project an industrious agenda of practical cooperation in such areas as critical minerals, maritime surveillance, port infrastructure, and energy security to counter doubts over its viability. This could be interpreted as an encouraging sign for the grouping. Despite this, substantive progress remained conspicuously absent. For instance, a key purpose of this meeting was to set a date for the leaders' summit, which has been indefinitely postponed since 2025. That remains an open question.

In a sense, this uncertainty over the Quadrilateral Security Dialogue, forged as a counterbalance to China's rising power in the Indo-Pacific, reflects shifting geopolitical realities. Most important among these is the détente between the US and China, as reflected in President Donald Trump's meeting with his Chinese counterpart, Xi Jinping, in Beijing earlier this month (with a reciprocal visit by Mr Xi to Washington planned for September). Central to this development is the status of Taiwan. Its continuation as an independent nation remains critical to Indo-Pacific security. Yet during Mr Trump's visit, Mr Xi and the Chinese press sought to emphasise the "One China" principle, which asserts that Taiwan is an integral part of the People's Republic. Although the US State Department has underlined that there is no change in its policy of informal political and military support for Taiwan, the view from the White House signals an unmistakable decoupling between the two nations.

If this ambivalence raises doubts about the basic significance of Quad, the recent articulation of Mr Trump's strategic foreign-policy vision underlines the point. Dubbed the "Monroe Doctrine 2.0" — a pun on the 1823 Monroe Doctrine, which it essentially updates — it positions the US as the dominant security guarantor of the Western Hemisphere. The war in West Asia has added to the Quad nations' concerns. The joint US-Israeli war on Iran, which began on February 28, has led to a substantial drawdown in the US defence armada from the Asia-Pacific to West Asia. With US forces using up more than half their pre-war stockpiles of critical munitions in the war against Iran, Quad allies, notably Japan, have become increasingly worried that they will not be able to count on the US to come to their defence in the event of Chinese aggression in the South China and East China Seas.

There is some irony in Quad's predicament in Mr Trump's second term. It was in his first term that the grouping, which was largely moribund for a decade, was revived. The reconstituted coalition was revived during a 2017 East Asia Summit in the Philippines. It saw the Trump administration officially rename the US Pacific Command as the US Indo-Pacific Command. It was during this time that India and the US signed several foundational defence agreements. Under President Joe Biden, the informal grouping held its first ever "Quad Leaders' Summit", conducted virtually because of the pandemic. Since then, there have been six summits, the last being in 2024. India's plans to host a summit have since been unfulfilled. The latest visit did not advance that agenda significantly.

## Powering transition

India needs resilient electric-mobility infrastructure

The increase in fuel prices, owing to the crisis in West Asia, demands urgency in accelerating the transition to electric vehicles (EVs). For India, where petrol and diesel account for more than 80 per cent of the transport sector's energy consumption, expanding electric mobility is critical to reducing long-term dependence on imported crude oil and gas. Yet India's EV transition, particularly in passenger cars, remains uneven and slow. EVs accounted for around 8 per cent of all new vehicle registrations in 2025, far below the country's target of achieving 30 per cent by 2030. Much of this has been driven by electric two-wheelers, which accounted for nearly 57 per cent of EV sales in 2025, while electric three-wheelers contributed around 35 per cent. The adoption of electric cars, however, continues to lag behind global trends. The International Energy Agency's latest "Global EV Outlook" notes that despite being the Asia-Pacific region's second-largest car market, India's sales of electric cars remained lower than those of countries such as Vietnam and Thailand. China has already crossed 50 per cent EV penetration in new car sales, while several European countries in 2025 moved well beyond 20 per cent.

One of the primary bottlenecks is the lack of charging infrastructure. India had around 29,000 charging stations for the public early this calendar year, a significant improvement from the barely 5,000 a few years ago. However, this is grossly inadequate for a country of India's size. A recent analysis pointed out that in July last year, India's charger-to-EV ratio stood at roughly 1:235, far below the global benchmark of six to 20 EVs per charger. Deloitte's 2026 "Global Automotive Consumer Survey" for India found that an inadequate charging network, long charging durations, and limited residential charging access were among the biggest deterrents to EV adoption. Affordability is another challenge. Electric cars have higher upfront costs than vehicles running on the internal combustion engine (ICE) because of expensive battery systems. India also remains heavily dependent on imports for lithium-ion cells and critical minerals such as lithium, cobalt and nickel, exposing the sector to supply-chain vulnerabilities and geopolitical risks. Consumers also remain uncertain about battery life, resale value, inadequate servicing networks, and replacement costs.

The government has, nevertheless, taken steps to strengthen the EV ecosystem. The recently launched PM Electric Drive Revolution in Innovative Vehicle Enhancement (PM-E-DRIVE) scheme and its earlier versions have aimed to support EV adoption, public-transport electrification, and the expansion of charging infrastructure. The production-linked incentives for advanced chemistry cells aim to promote domestic battery manufacturing. EVs also attract a lower goods and services tax than ICE vehicles, while several states offer subsidies and exemptions on road tax. However, it appears more needs to be done to facilitate a quicker transition. It requires a coordinated strategy. Charging infrastructure must expand rapidly across highways, Tier-II and -III cities, residential complexes, and public spaces. Investment in domestic battery manufacturing and research is essential to reduce import dependence and lower costs. As India pursues its net-zero target for 2070, accelerating electric mobility will be indispensable in building a cleaner and more energy-secure transport system.



## Policies to raise India's FTA utilisation rates

High tariffs and complex compliance requirements continue to deter free-trade agreement utilisation

India has signed several free-trade agreements (FTAs) over the last couple of years, including relatively deep ones with the European Union (EU) and the United Kingdom (UK). The government, in its recent interactions with industry, has repeatedly emphasised the need for increasing the utilisation rates of these FTAs. This is most appropriate, given the growing pressure on India's balance of payments arising from a combination of factors, including a rising current account deficit, which is expected to widen further due to the persistent West Asian crisis and high prices of imported oil and gas, declining net foreign investment inflows over the past two years, and a fast-depreciating rupee.

However, as a return to stability and pre-conflict levels of oil and gas shipment to India may take several months, awaiting the resolution of the conflict, a longer-term, more comprehensive approach beyond mere exhortation of industry is required to increase the utilisation rates of FTAs. The fact that the FTA with the EU is still to be ratified, the one with the UK is yet to be implemented, and negotiations with Canada have only just restarted gives us valuable time to undertake concrete measures towards maximising FTA utilisation and benefits.

FTA utilisation by firms is primarily led by the extent of the "preference margin" (that is, the difference between the most-favoured nation or MFN duty and preferential duty), simplicity of the rules of origin and the administrative ease of compliance with the FTA provisions. While there is no accepted threshold level of preferential margin, a 3-4 per cent differential between the MFN and corresponding preferential duty is considered worthwhile for firms to use the FTA. The cost of information collection, logistics and compliance is otherwise greater than the small margin of benefit that the FTA may offer the exporter. India, given its high level of average applied MFN duties in the

manufacturing sector relative to developed and comparator developing economies, offers a significantly higher preferential margin to the partner country in its FTAs relative to the expected gain for its exporters.

For example, in the case of the India-ASEAN FTA, commonly used by policymakers as a yardstick to highlight the low FTA utilisation by Indian companies in the past, the preferential margin was favourable to the Association of Southeast Asian Nations (Asean) economies relative to India. At the initiation of the first phase of tariff liberalisation under the FTA in 2010, over 60 per cent of the tariff lines, covering 80 per cent of imports, were under the duty-free or less than/equal to 5 per cent tariff category in major Asean economies. There was, therefore, little, if any, incentive for Indian firms to use the FTA to export. In comparison, India had 45 per cent of its imports in the higher tariff category of 5-10 per cent, thereby giving a distinct advantage to the Asean nations. India's tariff structure remained the same till the completion of the tariff liberalisation process in the FTA with Asean in 2016.

More importantly, India has since undertaken a further increase in its average MFN applied tariffs in the manufacturing sector. The number of tariff lines in the 10-15 per cent and 15-25 per cent tariff category has increased markedly in the last decade, from 1.4 per cent and 1.7 per cent (2014) to 33.5 per cent and 14.9 per cent (2024), respectively. Inevitably, this gives a greater advantage to our partner countries in the FTA. This dimension is even more significant now that we are signing FTAs with developed economies such as the European Free Trade Association (EFTA), the EU and the UK, where a majority of tariff lines are in the duty-free or less than 5 per cent tariff category.

With India's much higher average manufacturing MFN tariff of about 13 per cent, the preferential margin and hence, gain is significantly higher for the



STRAIGHT TALK  
AMITA BATRA

## Wealth erosion will deepen slowdown

Prime Minister Narendra Modi's recent call to citizens to economise on fuel, cooking oil and foreign travel has set off a debate on the impact of the West Asia crisis on the Indian economy. With government-owned oil firms finally biting the bullet and increasing petrol and diesel prices in the last fortnight, after four years of holding retail prices steady, inflation is expected to inch up sharply from a benign under four per cent for many months.

With household budgets under strain from rising prices, coupled with slow income growth due to a decelerating economy, the consumer goods sector is bracing for a demand slowdown, even demand destruction in some categories. Businesses are going back to spreadsheets, revisiting their costs, supply chains, sales and demand forecasts and some reworked strategies are already visible in the market — from price increases, product and packaging tweaks to delayed deliveries and launches.

Prices of essentials are already up anywhere from 2 per cent to 7 per cent, and this when only a third of the losses incurred by oil firms in selling petrol, diesel and cooking gas at below-market prices is passed on in terms of higher pump prices. Even if just half of the ₹30,000 crore per month under recovery of oil marketing firms is passed on to consumers, the direct hit to households' budgets will be over ₹1.75 trillion on an annualised basis. In the United States, where pump prices reflect rising crude prices, consumers have already spent an additional \$45 billion (about ₹4.25 trillion) on petrol and diesel since February

28 this year, compared to last year, due to the US-Iran war. And we have not even started counting the second- and third-order impact of rising fuel costs that can quickly result in a generalised price rise.

Though opinion is divided on how serious the West Asia crisis-led demand slowdown can be, one often overlooked factor this time around is the stock-market wealth effect. There are over 240 million demat/trading accounts in the country, with a run-rate of 3 million additions every month, though many individuals hold multiple accounts across online/physical brokers. Take any statistics, whether the government's or a private research firm's, and the number of unique registered investors in the Indian stock market will work out to the 127-130 million mark, including around 60 million in mutual funds alone. This is not a small number. It works out to almost 10 per cent of the Indian population! Even the cohort of currently active unique investors, around 45 million, is sizeable, given that they constitute the country's top income and consumption layer.

Now, over ₹40 trillion in stock market wealth has eroded since the beginning of the year. That's almost a tenth of the stock market capitalisation. And almost half of all assets under management with mutual funds in the country. Of course, not all of this ₹40 trillion is the retail investors' loss. But with domestic institutional investors' share of market capitalisation at a high of around 25 per

cent, a sizeable portion here, over a third, is accounted for by investments by retail investors indirectly in mutual funds. Add retail investors' around 10 per cent direct equity holding in the market, and what you get is Indian households sitting on ₹8.9 trillion of stock market wealth erosion.

To put that number in perspective, look at the size of key consumer sectors in the country. The fast-moving consumer goods (FMCG) sector that constitutes daily essentials like soap, toothpaste, shampoo, house cleaners and packaged food is at ₹20-25 trillion. The entire retail market in the country is around ₹22 trillion. Organised retail is at ₹30-33 trillion and consumer durables & electronics market is ₹5-6 trillion.

Key marketers in the FMCG sector have already pared their volume growth forecast for this calendar year, down almost two percentage points from 5 per cent to 3 per cent. Consumer durables makers are also bracing for a tougher demand scenario, even as they are forced to take a series of price hikes due to input and freight costs going up.

Surprisingly, the commentary on demand for 2026-27 from auto firms seems to be sanguine, primarily based on pending orders and sales trend till April. Discounting the impact of a sizeable ₹8.9 trillion financial asset loss, primarily of the well-off consumer, on sales of goods like mid-to-high-priced cars, bikes, housing, and even services like expensive domestic and foreign holidays, will be at a marketer's own peril. With forecasts of a weak monsoon, and its concomitant adverse impact on rural sentiment/income and rising food prices for all, a perfect storm may be descending on the country's consumer markets.

This is especially true for the deeper trade agreements that India has signed with the EU and the UK. There is a substantial regulatory- and standards-related learning curve, and related compliance costs, in using these FTAs that these enterprises may find expensive to incur on their own. A thin preferential margin coupled with high costs of compliance can be a major deterrent to using FTAs, especially if trade volume is also small, as with FTFA nations.

In South Korea, India, Japan, for example, the state provided technical and financial assistance through specific workshops and programmes designed to educate businesses. This helped them increase their FTA utilisation rates from 20 per cent in the first decade of the 2000s to around 70 per cent in the 2010s. It is, therefore, necessary for the Indian Ministry of Commerce to set up a dedicated portal for information and free consultation for FTA utilisation, as well as organise workshops in collaboration with industry chambers for creating necessary FTA literacy.

Hence, alongside the early completion of the announced comprehensive review of its high tariff structure, the government needs to design and implement FTA-specific policy measures and awareness programmes to facilitate increased utilisation of the recently signed FTAs by Indian industry.

The author is professor, School of International Studies, JNU. Her book, *India's Trade Policy in the 21st Century*, was published by Routledge, 2022. The views are personal.

1. WTO Tariff Profiles



ACROSS THE BOARD  
SHAILESH DOBHAL

## The art of collaborative intelligence



SAURABH SHARMA

The words of the 2024 Nobel Laureate in Physics, Geoffrey Hinton, feature in the epigraph of Saikat Majumdar's *Open Intelligence: Education Between Art and Artificial*.

Popularly known as "the Godfather of AI", Dr Hinton notes that humanity "is just a passing phase in the evolution of intelligence". This seemingly deep speculation is both profound and unsettling. Passing or not, this phase has taken a tumultuous turn as humans co-share this notion of intelligence increasingly with machines. Since several tasks can now be out-

questioned to AI systems and tools, the question we must confront is what humans must learn to make them appear distinctly intelligent. This is an issue Mr Majumdar encountered in a boarding school in Ooty. In the book's first chapter titled "Art in the Artifice", the creative writing teacher talks about "the paradoxes of education: its power to liberate and its tendency to confine". Invoking Yu. Noah Hara's

*Nexus: A Brief History of Information Networks from the Stone Age to AI*, he seconds the concept that "intersubjective networks" shape human history, underlining how generative outputs by AI show signs of human biases.

Determining whether progress in AI development will reinforce the trend or create something novel is about as unpredictable as AI's understanding and treatment of humans in the future. But recent history suggests that the consequences are inevitably directed at the most disenfranchised and marginalised. The "vitriol content directed at

the Rohingyas to the top of then Facebook users' newsfeeds, downplaying everything else" is an extreme example. And so are viral deepfakes, against which many public figures are seeking protection.

This chapter also underscores our tendency to confuse "novelty for originality". A case in point is a test prompt this writer executed on Claude, by Anthropic. On being asked what's that one thing humans can "comprehend fully" in the human-machine era, and the limits of understanding of AI-driven systems and humans, the chatbot concluded that "we are in the middle of a meeting between two kinds of intelligence that have never met before".

This reviewer is unsure whether we are under- or over-subscribing to the "uniqueness" of human intelligence, owing to its "subjective consciousness", as Mr Majumdar notes. Or if the evaluation of the "economics of the skills"—obsolete or upcoming—

under the framework of this new reality is possible, as the author remarks.

Prima facie, what lies ahead is a challenge, which is growing and becoming more complicated at warp speed, which is why writing a book like *Open Intelligence*, which deals with current realities, is a risk. But there is an opportunity, too, to direct humans towards other ways of imagining AI-related concerns facing humanity. This is evident in the chapter "The Great Roulette Wheel", in which Mr Majumdar reflects on humans' preferred — or prescribed — way of learning in an educational system designed to make its beneficiaries become employees in future. That is, by "copying vast amounts of material from sources, committing enormous quantities to memory".

Invoking the concept of "gambling", the author argues that young people are losing "the happiest and most formative years of their lives in the

gamble of examinations". Must experience then be considered a barometer of learning, education, or intelligence, giving humans a distinctive edge? Can skills and such as creative writing be taught? These are a few questions that the author makes the reader consider.

As it is with most small- or large-scale problems facing humanity, the future path for the human-AI nexus, too, is the middle one. The one involving their collective intelligence and shaping a collective future, which is a topic Mr Majumdar addresses in "The Tense Future of Intelligence".

The word play here won't be lost on the seasoned reader. To speculate the future, one must inevitably turn to the past. The author does this, too, reflecting a time when people used to remember phone numbers by heart. Is it useful anymore? Maybe not. "The value of factual memory needs to be radically rethought in the digital age," he notes.

Sharing his children's approach towards language and problem-solving, the defeat of Lee Sedol, the world-famous Go champion, in a Go match by Google's DeepMind, the "experimental intelligence" and the interplay of the concrete and the abstract in informing intelligence. Mr Majumdar concludes that emotions are but a "performance" of a kind. They are "dependent on certain animate and inanimate patterns", making one realise the role of "personalised consciousness behind" them. It is to make his quality in Mr Majumdar's view that makes humans distinctive.

Mr Majumdar appeals to the need to "imagine our education innovatively" to be "ready for an order of a very different kind", which may perhaps enable us to tell our own story in ways. To quote, "The reason, as he concludes, is the real danger of the loss of our humanity" isn't "coming from the machines themselves. It's coming from us".

The reviewer is a Delhi-based writer and culture critic. @writely\_life

thehindubusinessline.

WEDNESDAY • MAY 27, 2026

## Net ambiguity

Airtel's priority plan reignites net neutrality debate

**A**irtel's launch of a priority plan that uses 5G network slicing to offer superior connectivity to postpaid subscribers has sparked a debate over the contentious issue of network neutrality. At the heart of the issue is a simple question: can telecom operators legally and ethically create class-based service differentiation in mobile networks without violating the principle that all network traffic should be treated equally?



Nearly a decade ago, Airtel had experimented with zero-rating plans that offered free or preferential access to a select set of apps and websites. At that time, the Telecom Regulatory Authority of India (TRAI) had shut down such offerings, ruling that content-based differential pricing violated network neutrality norms. Airtel's new priority plan, however, falls into a regulatory grey area. The differentiation now is user-based, not content-based. That distinction may appear technical, but it is crucial. Network neutrality rules were designed to prevent discrimination between online services; they are less explicit on whether telecom operators can differentiate between high-paying subscribers and others. Such class-based differentiation is common in airlines and premium amenities in hotels. Telecommunications already follows this logic in fixed-line broadband, where premium subscribers routinely get higher speeds and more bandwidth.

Mobile networks, however, historically could not replicate this because wireless spectrum is finite and shared. Operators lacked the technical ability to guarantee differentiated experiences without affecting everyone else. 5G changes that because it allows network slicing. One of 5G's defining features, slicing allows operators to create virtual partitions within the same physical network. Think of it as a highway where all vehicles normally share the same lanes, often leading to congestion. With slicing, dedicated lanes can be created for specific user categories, without building a new road. But the neutrality debate does not disappear so easily, since the spectrum remains limited. If a premium subscriber gets a faster lane during periods of congestion, does that mean a regular subscriber is pushed into a slower lane? A service differentiation model that short-changes baseline users could invite regulatory scrutiny.

From a business perspective, however, Airtel's move is understandable. India's telecom sector has struggled to raise average revenue per user (ARPU), even as data consumption has surged. Operators bore the cost of network expansion while OTT players captured much of the digital value. Offering premium quality-of-service benefits could now generate cash for future investments. But if operators are to build advanced 5G networks, they also need affordable access to more spectrum. Policymakers may need to revisit pricing, particularly for sub-1 GHz bands that are critical for efficient 5G deployment. With premium plans and affordable spectrum, both operators and consumers will benefit.

POCKET

RAVIKANTH



## SSE: A vital cog in the CSR chain

WORTH TRYING. Channelling CSR funds through Social Stock Exchange can unlock large funds, and be deployed transparently



K GOWRI SHANKAR

**I**ndia is the only country in the world to have a mandated 2 per cent corporate spending of CSR. This generates on average ₹34,909 crore in funds every year, making it one of the largest pools of mandated social impact capital in the world. In 2022, India built a regulated social capital platform inside NSE and BSE: the Social Stock Exchange (SSE). This initiative was designed to connect verified non-profit organisations with investors who would want to invest in the social development of the country.

The idea was sound, but the largest pool of social impact capital still cannot use this infrastructure as it is limited only to retail investors and excludes corporates. Since 2022, the SSE has registered around 170 NPOs and mobilised ₹42.56 crore through 16 projects (BSE SSE and NSE SSE combined data, 2024-25), while India's CSR ecosystem deployed over ₹1,00,000 crore in the same period (PIB, 2025; PRIME Database, 2026). Allowing CSR funds to flow through the SSE could be the key reform that can turn India's social capital into a powerful engine for Viksit Bharat.

## THE WORLD HAS TRIED THIS

The Social Stock Exchange is not a new idea. Brazil, South Africa, Portugal, the UK, Canada and Singapore have all tried it, and most failed. Their common weaknesses were simple: no funding source, weak regulation and thin NGO pipelines (ICNL-Samhita Global Review, 2024).

India has what these countries did not have. A mandatory annual CSR obligation, SEBI regulation, and the institutional homes of the SSE. No other SSE has had these, making it very possible for India to succeed if used correctly.

At present, CSR funds directed to SSE-listed NPOs through Zero Coupon Zero Principal (ZCZP) bonds or Social Impact Funds do not qualify as CSR expenditure under Ministry of Corporate Affairs (MCA) rules. This gap should be addressed.

The MCA should recognise subscription by corporates to instruments offered through the SSE as CSR expenditure. This will immediately unlock ₹34,909 crore of mandated capital that can be deployed



KEY REFORM. Allowing CSR funds through Social Stock Exchange can turn India's social capital into a powerful engine for Viksit Bharat

transparently through the SSE platform. SEBI has already recommended that ZCZP investments be given CSR equivalence. The CDBT has confirmed 80% benefits for donors. No new legislation is required and there is no cost to the exchequer. A single notification from the MCA will make the SSE a live functioning market overnight.

But two structural challenges will remain. The NGO pipeline needs to deepen so that the capital, once unlocked, has credible and capable organisations to absorb it. And the regulatory framework needs to be optimised so that the platform works efficiently at scale. SEBI has already moved in the right direction by extending NPO registration validity to three years and reducing the minimum ZCZP subscription threshold.

**Activate idle capital.** In FY24, ₹2,800 crore sat in unspent CSR accounts even as many government welfare schemes continue to underspend because delivery capacity is uneven. SSE-listed NPOs, independently verified and already working in target geographies, could help put this capital to immediate

**The NGO pipeline needs to deepen so that the capital, once unlocked, has credible and capable organisations to absorb it**

use. A cross-ministry notification recognising SSE as an eligible implementation channel would turn idle allocations into active, outcome-linked development finance.

**One rating to replace four registrations.** An NGO today must maintain CSR-1 rating with MCA, secure FCRA clearance with the Home Ministry, get 12A and 80C eligibility clearances from the Income Tax Department, and register with the DARPAN portal of NITI Aayog. Yet, a company still has no standardised signal of whether the NGO delivers results on the ground.

A SEBI-mandated Social Performance Rating, administered by ICR or CARE and renewed every three years, can replace this fragmented architecture with one market-readable quality signal. SSE listing will then become the only credential a CSR team will need. It will reduce compliance burden for companies, lower partner-verification costs, and improve trust. For NGOs, it will turn compliance into credibility and credibility into capital, giving them a clear reason to pursue listing on SSE.

**Map money to need.** Six States have absorbed roughly 60 per cent of all CSR spend over a decade (MCA CSR Data, CSRBox 2023). Aspirational districts received just 2.15 per cent of cumulative CSR since 2014 (NITI Aayog, 2023). What we need is a national CSR Registry maintained by NITI Aayog, geo-tagged

by district and updated in real time. This will give every CSR committee a live heat map of where India's development capital is most needed. The registry listings can be matched to pre-verified SSE-listed organisations already operating there. State governments can also feed a Demand Registry into this platform, signalling priority needs at block level.

**Measure outcomes, not activity.** India counts outputs: trees planted, toilets built, hospitals constructed, students enrolled. Outcomes are a different question: are those schools staffed, patients treated well, those trees alive? The SSE's Social Impact Assessor framework already mandates outcome reporting. A National Social Return On Investment framework assigning evidence-based economic proxies to social change would allow policymakers to quantify the impact of CSR on GDP. This will help change the conversation from compliance to national investment.

Finally, a dedicated CVC vigilance cell for CSR, a SCORES-style public whistleblower portal, and proportionate penalties for misreporting will help establish credibility of the entire system. When funds flow through a SEBI-regulated platform, irregularities should be structurally harder to conceal.

The writer is Global Coordinator, One World One Family Mission

## Suggested changes in IIP, a leap forward

The factory index does not capture present day industrial activity. The new index will later provide unorganised sector data

Mridul Saggara

**C**ountries have, for long, tracked factory output. Yet, it was only in 1920s that the US Fed for the first time made a concerted effort for compiling monthly industrial production giving rise to the worldwide adoption of IIP as the high (monthly) frequency volume indicator to track activity levels. India was amongst the earliest countries to follow suit. It set 1937 as base year more than a decade before international recommendations emerged on compiling such an index.

Since then, its base year has been revised nine times. The last base change was done to 2011-12 in 2014. Given the rapid pace of innovation and consequent technological obsolescence in industrial production structures, more than a decade old base now poses problems of systemic errors and flawed statistical representation of the true picture.

Therefore, in September 2024, the Ministry for Statistics and Programme Implementation constituted the Technical Advisory Committee for Base Year Revision on the Index of Industrial Production (TAC-IIP) with a wide remit to not only change the base but also bring about conceptual and methodological improvements. The TAC, which I had the privilege to Chair, submitted its report this mid-month and it is now in the public domain.

The key improvements recommended include: (i) introduction of chain-linked IIP in addition to the fixed base index, (ii) substitution and augmentation of factors to address the problems of creative destruction of firms and products amid changing production lines that imparts a downward bias to output measurement, (iii) selection of geometric mean based linking factors at the level of broad aggregates for its better statistical properties, (iv) moving towards homogenous methodology and fuller coverage of State-level IIPs in alignment with methodology for all-India IIP, and (viii) introduction of gas supply, water supply and sewerage & waste management as part of the IIP in line with the international recommendations of IIP.

Certain recommendations of the TAC-IIP are forward-looking that may take time to implement but are nevertheless important. These include: (i) developing a de-seasonalisation unit with MoSPI to start disseminating de-seasonalised data series as soon as may be possible, (ii) developing indices



ON THE ANVIL. IIP with a new base and weighting pattern sources

for unincorporated sector by considering an industry level indicator in ASUSE survey, and (iii) developing business registries through the use of GST data with potential to significantly improve IIP. TAC-IIP suggested using GST data as a parallel exercise for one to two years before taking a view on the robustness of the information to capture it for activity levels.

## MAIN CONSIDERATIONS

Two main considerations guided our work. First, if we want to deliver information leaps and not just the new base, we need to fix the problem of the IIP getting unrepresentative over time. So, we looked beyond standard methodologies followed for years. In doing so, we were mindful of maintaining comparability with the

series of earlier bases but were not bogged down by what needs to be done additionally.

Second, while searching for methodological improvements, we kept in mind the best international practices in line with the International Recommendations for the Index of Industrial Production (IIRIP). So, we pushed for the coverage of minor minerals with the State governments and gas, water supply and sewerage with the administrative ministries with the help of MoSPI.

Simultaneously, we also realised that electricity as aggregate did not do justice to the sector. We suggested disaggregation with types of electricity generated to capture the energy transition from non-renewables to renewables that the country is expeditiously making, both in the interest of climate goals and our own energy security. Once information on the unincorporated establishments is covered under ASUSE and eventually QBUSE, the index will be in a position to bring in timely information for unincorporated sector.

This journey will begin on June 1 when the April 2026 IIP gets released on the new base and providing new weighting pattern for the new item basket and sectors.

The writer is Professor, IIM Kozhikode and the Chairman of TAC-IIP. Views are personal

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

## Edible oil supply

Appropos 'Crushing problem' (May 26), the West Asian conflict and the resultant crude oil shortage has come to impact the availability of palm oil also, which is largely consumed by the people. Unfortunately, major edible oil producers are curtailing their exports, triggering a price rise.

The Centre's move on hiking import duties on edible oil items, to force consumers to reduce consumption and conserve foreign exchange, does not augur well as it will have a serious impact on low income families

depending on the affordable item. As suggested, the right way would be to reduce the customs duty to give relief to the consumers and take necessary steps in enticing farmers to grow more edible crops such as sesame, sunflower and mustard to offer the demand for palm oil.

## RV Baskaran

Pune

## AI aspirations

This refers to India's AI options are linked to energy costs (May 26). The article rightly draws attention to a critical bottleneck in India's AI

ambitions: reliable and affordable power. While we speak of becoming a global AI player, the reality of electricity shortages and high costs for data centres threatens to hold us back. The way forward lies in urgent, practical steps. Prioritising robust energy infrastructure, accelerating renewable energy projects and offering targeted incentives for AI-related power needs are essential. Public-private partnerships in green energy and smarter grid management can make a real difference. By addressing this foundational issue, India can turn its

Aspirations into tangible progress and secure a stronger position in the global technology landscape.

## SM Jeeva

Chennai

## US-China power dynamics

This refers to 'It's China that needs the West, not the reverse' (May 26). While China has grown rapidly, its economy remains deeply dependent on Western markets, technology and capital. Any illusion of self-sufficiency could prove costly if global trust erodes further. For India, this is a timely reminder to

strengthen our own economic resilience. We should focus on building reliable trade partnerships, investing in domestic manufacturing and innovation, and maintaining strategic autonomy without isolation. Diversifying export markets and upgrading our infrastructure will help us navigate this shifting global order more effectively. A balanced approach that values cooperation alongside caution will serve our long-term interests best.

## Abhanna Barathi

Chennai

# Flip-flops over Iran

Trump's Iran 'deal' is riddled with uncertainties

Sridhar Krishnaswami

As of now, no one with perhaps the exception of US President Donald Trump knows what the outlines of a deal are with Iran. The chief concern in many quarters is of Washington shifting its focus of Tehran's nuclear programme to a governing mechanism for the Straits of Hormuz, which was not in the picture at all when Israel and the US started their operations on February 28.



TRUMP, Confused signals REUTERS

From "imminent" to "in the near future" are the words on the peace deal which has raised the eyebrows of even Trump's hawkish allies on Capitol Hill and his loyal base.

Gleaning from what has been put out in American media and attributed to "officials" and "sources", Washington and Tehran are on the verge of a breakthrough. The issues are: ending hostilities, the gradual opening of the Strait of Hormuz, unfreezing of Iranian assets and the country allowed to sell its oil, a commitment by Tehran not to pursue nuclear weapons and talks for handing over some 900 pounds of enriched uranium.

But hardliners in Washington, including in Capitol Hill, are saying that the Trump administration is rushing into a so-called memorandum after initially saying that it had all the time. In other words, Washington is seen as "cutting and running".

### BLURRED OBJECTIVES

The problem for Trump is that he was already under pressure in his party and outside for having gone into Iran with a set of blurred objectives that till date have not been outlined. The Iran operations started with the original purpose of blunting the nuclear weapons programme, but soon got into the regime change mode. And now hardliners, who have never been comfortable with Tehran's posturing on its nuclear programme, its role in the region or propping up proxies like Hamas, Hezbollah and Houthis, are appalled that the so-called deal leaves the clerics and Ayatollahs and what all they stood for very much in place.

Or as the Chair of the Senate Armed Services Committee, Roger Wicker put it, Trump was being "ill advised to pursue a deal that would not be worth the paper it is written on", and that "everything accomplished by Operation Epic Fury would be for naught". And an influential

Republican Senator Lindsey Graham argued that a precedent of Iran controlling the Hormuz and threatening the oil infrastructure of the neighbours is "a major shift of the balance of power in the region and overtime will be a nightmare for Israel".

The Netanyahu government has been maintaining a studied silence on the future of Iran's nuclear weapons programme — with speculation over whether Tehran will fully abandon or postpone it for a period of between five and 20 years; and on the fate of the remaining enriched uranium. Earlier, there was the impression that the uranium stockpile will be transferred to the US; now there are questions as to whether it will be with Iran or in a third country like Russia.

Now, adding to the existing confusion is Trump maintaining that Muslim nations like Saudi Arabia, Qatar, Pakistan, Turkey, Egypt and Jordan should join the Abraham Accords and normalise relations with Israel as he negotiates an accord to end the war with Iran. The UAE and Bahrain have already signed the 2020 Accords. Turkey, Egypt and Jordan have relations with Israel; but many Arab nations, especially Saudi Arabia, are saying that the Abraham Accords do not have a roadmap for Palestinian statehood. Pakistan is said to have rejected the proposal. And Tel Aviv is yet to make an official response.

"Trump is trying to sell an Iran deal as an Abraham Accords sequel; good for Israel, good for the region, tough enough for Washington. But he is trading one fantasy for another — from forcing Iran to surrender to pretending a fragile deal can anchor a new Middle East order", Ali Vaez, Iran project director of the International Crisis Group has been quoted.

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

# Countering resource nationalism

Indonesia's move to channelise coal exports through a state entity must make India calibrate its energy strategy

### CAPITAL IDEAS.



RICHA MISHRA

The current geopolitical uncertainty has triggered an energy market disruption that is benefiting coal.

No surprises then that the major coal exporting nations are aggressively leveraging the current crisis to maximise revenue, capture market share, and more importantly dictate trade terms, as the Asian and European utilities swivel away from expensive, bottlenecked natural gas.

Indonesia's move to "nationalise coal export activity" has caught media attention. According to reports, Jakarta is moving to become the single selling point for Indonesia's thermal coal exports. If and when implemented this would end the current mechanism of international buyers negotiating directly with the miners and traders in that country.

It aims to centralise exports of natural resources, including coal, crude palm oil and nickel-ferro alloys. According to reports, all Indonesian coal exports to foreign buyers will be handled by a single state-owned enterprise (SOE).

Should Indian players worry about this move?

Historically, Indian power plants and traders have negotiated directly with private Indonesian miners to secure low-cost, low-ash thermal coal. Reports last week said, Indonesian President Prabowo Subianto has said that his government will mandate that exports of palm oil, coal, and ferroalloys be conducted through a state agency, as the country seeks to tighten its control over its natural resources and boost state revenue.

Though Indonesia is among the largest suppliers of thermal coal to India, Jakarta's plans will not fructify overnight. To minimise an immediate trade freeze, the Indonesian government has structured a strict, highly compressed three-month transition window, according to reports.



ENERGY SECURITY. India must work towards ramping up domestic coal production

India relies on Indonesia to sustain its grid and vital industrial sectors, making the volume, quality, and logistics of this trade highly critical. Unlike Australia, which sells premium coking coal for Indian steelmaking, Indonesia exports low-to-medium calorific value non-coking coal. This is used exclusively for electricity generation in Thermal Power Plants (TPPs) and kiln-firing in cement factories. Several coastal Indian power plants are designed and configured specifically to run on imported coal mixtures.

The Power Ministry routinely mandates utilities to import coal for blending up to 10 per cent of their total fuel mix to safeguard against domestic mine flooding during monsoon seasons.

### INDIA'S MOVES

India must maximise domestic alternatives and widen its supplier base to shield itself from potential Indonesian supply chain shocks, price floor enforcement, and newly proposed

Historically, Indian power plants and traders have negotiated directly with private Indonesian miners to secure low-cost, low-ash thermal coal

export tariffs. India has successfully pushed its domestic coal production over 1 billion tonnes. Coal India Ltd (CIL) is actively working to displace imported thermal volumes by flooding local auctions and expanding production pathways.

According to Tracy Shuchart, Senior Economist, NinjaTrader Group, LLC, "India is less exposed to this than the headline numbers suggest."

According to Coal Ministry data, total coal imports fell 7.9 per cent in FY25 to 243.62 million tonnes, saving roughly \$7.93 billion in foreign exchange. "The number that matters most for the Indonesian story is buried inside that release.

Coal imports for blending by thermal power plants dropped 41.4 per cent year-on-year in FY25 even as coal-based power generation grew 3 per cent. That is the precise demand category: Indonesian low CV coal serves, and India already cut it by more than 40 per cent in a single year," she pointed out.

Domestic production crossed 1 billion tonnes in FY25 and the government's stated target is zero substitutable coal imports by FY26. "On supplier mix, Bancosta vessel data shows Indonesia's share of India's seaborne imports fell from roughly 60 per cent in 2024 to 40.3 per cent in the first nine months of 2025, with Russian and South African cargoes hitting record highs to replace Indonesian volumes,"

Shuchart said. The government must be credited for working towards a policy to safeguard against such policy disruptions.

"If Jakarta's single SOE model creates supply disruption or enforces price floors above market, India accelerates a substitution already well underway. The buyers genuinely cornered by this policy are the Philippines and Bangladesh, where Indonesian dependency runs much deeper," she said.

The proposed move by Indonesia reflects a growing trend of resource nationalism across commodity-exporting economies, where governments are seeking greater control over pricing, revenues, and strategic natural resources.

Mexico and Chile are tightening state control over lithium and oil-producing nations are using state entities to influence hydrocarbon production and pricing.

Energy and mineral resources are increasingly being viewed not just as commercial commodities, but as strategic national assets linked to economic security and geopolitical influence.

This may improve tax revenues and national bargaining power, but it also creates execution risk, say critics. The success of this policy will depend on whether it can be implemented without disrupting shipments, politicising allocations, scaring buyers, and making coal pricing less transparent.

The Coal Ministry estimates that overall domestic coal demand will scale up to 1.5 billion tonnes by 2029-30. Major Indian buyers of Indonesian coal are divided into two groups: conglomerate power producers that burn the coal directly in their coastal mega-plants, and specialised commodity trading firms that import the coal in bulk to distribute to mid-sized domestic industries.

Indian procurement strategies will have to pivot heavily toward alternative origins, such as Australia or South Africa, or sharply accelerate domestic coal production.

India's push to reduce dependence on imported coal to strengthen energy security is also crucial.

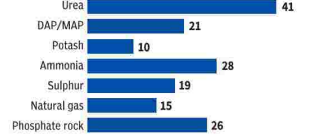
### STATISTALK.

Compiled by Vasupradha Sandeep, intern | Graphics: KS Gunasekar

## Ripple effects of the Iran conflict on the fertilizer market

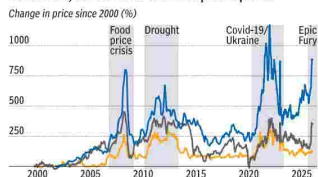
Nearly one-third of globally traded fertilizer passes through the Strait of Hormuz. Its closure therefore, cut fertilizer flows to the extent of 87 per cent of the pre-conflict average. This caused prices to skyrocket, with key inputs like urea being currently priced at \$850/tonne compared to about \$450/tonne in February. This is exacerbated by dwindling LNG imports forcing domestic fertilizer production to shut down. Historically, agricultural commodity prices have shown inflationary trends during crises, with rising fertilizer prices often pushing up food prices. The brunt of this will be felt more by the Gulf fertilizer-dependent countries

Global fertilizer, feedstock exports originating from West Asia Share in global exports (%)



DAP - diammonium phosphate, MAP - monoammonium phosphate. Based on 2024 data

### Fertilizers, food inflate when oil price spikes



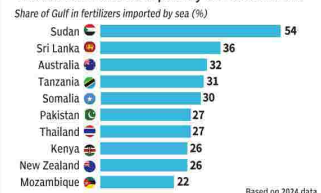
Source: S&P Global, The Energy Institute, International Fertilizer Association, World Bank, FAO, Center for Strategic and International Studies, UNCTAD

### Fertilizer prices shoot up



Note: DAP = diammonium phosphate; MOP = muriate of potassium; mt = metric tonnes. Monthly series. Last observation is April 2026

### Countries vulnerable to paucity of Gulf fertilizers



### On businessline.in

#### The policy pivot Trump needs

There are better ways to help US manufacturing and its behind-headers workers than through a weaker dollar alone, says Glenn Hubbard

#### The cost-per-fisher case India has not yet made

India holds the strongest development-country argument on fisheries subsidies — and the weakest procedural record in advancing, say Siddhartha K Rastogi and Chaitanya Khurana

#### Farewell to investment fluctuation reserve

Its scrapping was not surprising given the operational challenges it posed to banks. But with rising G-Sec yields the abolition could have been gradual, argues Manas R Das

### thehindubusinessline.

## TWENTY YEARS AGO TODAY.

May 27, 2006

### IPO scam: SEBI bars Karvy group entities

SEBI on Friday barred Karvy group entities from carrying on several of its businesses including depository participant, share registrar and proprietary trading with immediate effect for its role in the IPO scam. In its order issued late Friday, SEBI barred Karvy stock broking subsidiary Karvy Stock Broking Ltd (KSBL) from taking fresh DP business.

### S&P looking at equity research on Indian companies

Standard & Poor's, a global provider of independent rating of investment risks, is contemplating entering India with its equity research products, Ms Lorraine Tan, Vice-President Equity Research, Asia Pacific of S&P, told Business Line here today.

### Left to examine Govt's divestment programme

The four Left parties extending outside support to the UPA Government are likely to meet next Thursday to review the Government's stand on airport modernisation, disinvestment, oil price hikes and reservations in educational institutions. The move assumes significance with the Government renewing its plans to move ahead with its disinvestment programme of profitable PSUs.

## BL TWO-WAY CROSSWORD 2688

1	2	3	4	5	6
8		9			10
11			12		
	13	14			
15					16
			18		19
17					
20		21			22
23					

### EASY

#### ACROSS

- Part of church building (8)
- Dirty talk (4)
- Emmet (3)
- Suspension of hostilities (5)
- In tennis, a let (3)
- Story told to point moral (7)
- Censure (5)
- Large self-service retail store (11)
- \_\_\_\_\_plane shutter, camera 'blind' (5)
- Accomplish, win (7)
- Look at (3)
- Card of taking suit (5)
- Point gun at (3)
- Unenlightened (4)
- Lees (8)

#### DOWN

- Hoboes (6)
- Make different (5)
- Wait momentarily (5)
- A composite of superimposed pictures (7)
- To reel, stagger (6)
- Fact of belonging to club (10)
- Lin. cover used at meal-times (10)
- Not readily understandable (7)
- Displease, make angry (6)
- Allow (6)
- To tickle (5)
- Rub out (5)

### NOT SO EASY

#### ACROSS

- Patterns worked out crossing the nave (8)
- Speck of soot not talked of in polite company (4)
- A worker or soldier in human terms (3)
- No more fighting for the Sappers: cut it out! (5)
- A snare of machine-made lace (3)
- Story with a moral backing in hotel bar, apparently (7)
- Find fault with the way Mabel put it (5)
- Large store can make up rest, right? (11)
- Sort of point that may be sharply defined (5)
- Ache I've got to bring it to a successful conclusion (7)
- It can observe a spring of water (3)
- Take a trick up to make a false charge (5)
- One's object is to be one in a thousand (3)
- The theatre's closed, so keep it secret (4)
- Men's diet may be composed of the dregs (8)

#### DOWN

- Takes to the road with the cargo-steamer (6)
- Change the rate in which pound is held (5)
- Wait a while and tumultuous sea will get up (5)
- Composite picture in mat gone wrong (7)
- Stagger along like a retriever of rubbish (6)
- Fact of belonging to a politician's joint (10)
- Lay it between plate and board (10)
- It's not obvious that pawnbroker has a right to it (7)
- It may hurt one's feelings to break the law (6)
- It allows one to give instruction to hairdresser (6)
- A goddess such as Clio to keep one entertained (5)
- If it turns up in one's area, wipe it out (5)

## SOLUTION: BL TWO-WAY CROSSWORD 2687

ACROSS 1. Cormorant 5. Cab 7. Iris 8. Attitude 10. Precious 11. Pink 13. Rebuff 15. Stench 18. Post 19. Corridor 22. Laudable 23. Pole 24. Tot 25. Permanent  
DOWN 1. Chipper 2. Raise 3. Artful 4. Thin 5. Caution 6. Break 9. Jiffy 12. Star 14. Biscuit 16. Harvest 17. Boiler 18. Pilot 20. Drone 21. Lamp

# Economy

WEDNESDAY, MAY 27, 2026

## IN THE NEWS

### RESTRAINT ON ANTI-DUMPING DUTIES COSTING INDIA: REPORT

**RISE IN RELUCTANCE BY THE GOVERNMENT TO GO AHEAD WITH IMPOSITION OF ANTI-DUMPING DUTIES DESPITE INVESTIGATION BY DIRECTORATE GENERAL OF TRADE REMEDIES (DGTR) IS COSTING INDIA DEAR IN TERMS OF ELEVATED IMPORTS AND THREAT TO FUTURE INVESTMENTS, ACCORDING TO A STUDY.** Between November 2025 and April 2026 the Central Board of Indirect Taxes and Customs and Finance Ministry have rejected 81% of the cases where DGTR had recommended anti-dumping duties, which is much higher than 16% in April 2025 and November 2025, the report by C-DEP Research and Center for WTO Studies, Ministry of Commerce said on Tuesday. In 2024-25 the rejection rate was 6%.

### Skymap Pharma to acquire IMPCL for ₹121 crore

SKYMAP PHARMA has emerged as the successful bidder for the strategic disinvestment of Indian Medicines Pharmaceutical Corporation Limited (IMPCL), with a winning bid of ₹121 crore, completing a strategic sale in recent years.

### Gadkari reviews highway projects in various states

UNION ROAD TRANSPORT and Highways Minister Nitin Gadkari on Tuesday reviewed the quality and maintenance progress of National Highway projects covering 4,335 km in Punjab and 3,332 km in Delhi and Haryana, following inputs received through media and social media platforms.

### Khadi products' FY26 sales cross ₹1.87 lakh crore

SALES OF KHADI and Village Industries products reached a historic level of ₹1,87,105 crore in 2025-26, the highest-ever sales figure, the Khadi and Village Industries Commission (KVIC) said on Tuesday. Sales during the previous financial year 2024-25 stood at ₹1,70,551.37 crore, and have surged multi-fold from ₹31,154 crore in 2013-14.

FE BUREAU & AGENCIES

## 75% battery storage projects below viability benchmarks

SAURAV ANAND New Delhi, May 26

INDIA'S RAPIDLY EXPANDING battery energy storage sector is coming under mounting financial and execution stress. Nearly 75% of the country's allocated two-hour standalone battery storage capacity in 2025 falls below viability benchmarks as aggressive bidding, collapsing tariffs and rising supply chain costs squeeze project economics.

According to a new report by JMK Research and the Institute for Energy Economics and Financial Analysis (IEFA), standalone Battery Energy Storage System (BESS) tariffs fell as low as ₹1.48 lakh per MW per month for two-hour systems in 2025, significantly below the benchmark viability tariff of ₹2.3 lakh per MW per month. "Nearly 75% of allocated 2-hour BESS capacity falls into the at-risk viability category,

## BOTH NATIONS AIM TO EXPAND BILATERAL TRADE TO \$50 BILLION BY 2030

# India, Canada stick to CEPA deadline

FE BUREAU New Delhi, May 26

INDIA AND CANADA have reaffirmed their resolve to conclude negotiations of the Comprehensive Economic Partnership Agreement (CEPA), which Canadian Prime Minister Mark Carney termed a game changer, by the end of this year. After meeting Commerce and Industry Minister Piyush Goyal in Ottawa, Carney posted on X, "We are working fast. I met Goyal to review our progress so far and explore future opportunities for our countries in energy, agri-food, technology and education."



Union Minister of Commerce & Industry Piyush Goyal meets Canada's Minister of International Trade Maninder Sidhu, in Ottawa on Tuesday

Goyal is leading a delegation of 100 Indian companies to Canada during his visit from May 25-27 to advance bilateral trade and economic ties with a

particular focus on accelerating ongoing CEPA negotiations. In his meeting with

Canada's Minister of International Trade Maninder Sidhu, the two ministers reviewed the

outcomes of negotiations completed to date and identified future opportunities.

Discussions with Canada's Minister of Agriculture and Agri-Food Heath MacDonald, centred on strengthening bilateral cooperation in agriculture, focusing on food security, sustainability, and agri-technology. Both sides explored meaningful opportunities for collaboration in the food processing sector.

Goyal also held wide-ranging talks with Canada's Foreign Minister Anita Anand and emphasised the importance of trade, investment, and technology linkages for the India-Canada Strategic Partnership. A concurrent round of technical negotiations is underway in Ottawa from May 25-29, running parallel to Goyal's visit, signalling the seriousness and pace both sides are bringing to the process.

India and Canada have already concluded two rounds of negotiations on the CEPA, the Terms of Reference (TOR)

for which were signed in March this year during Carney's visit to India. The first round of negotiations was held virtually in March, while the second round concluded from May 8.

This is the third attempt by India and Canada to negotiate the CEPA. Talks on the agreement were first launched in 2010 but failed to make significant progress. Negotiations relaunched in March 2022 were suspended in August-September 2023 amid political differences.

With bilateral trade currently standing at approximately \$8.5 billion, both governments have set an ambitious shared target of expanding this to \$50 billion by 2030. Alongside official engagements, Goyal will meet Canadian business leaders and investors during his visit. He is also scheduled to interact with the 'Maple 8'—the eight largest Canadian pension funds, which collectively manage assets worth 2.4 trillion Canadian dollars.

## India, US sign critical minerals pact to secure tech, energy supply chains

SAURAV ANAND New Delhi, May 26

INDIA AND THE US on Tuesday signed a bilateral framework on critical minerals and rare earths, deepening cooperation across mining, processing and recycling supply chains as both countries move to secure long-term access to materials critical for electric vehicles, batteries, semiconductors and advanced manufacturing.

The "Framework on Securing of Supply in the Mining and Processing of Critical Minerals and Rare Earths" was signed in New Delhi by External Affairs Minister S Jaishankar and US Secretary of State Marco Rubio.

The agreement comes amid intensifying global competition over access to lithium, cobalt, nickel, graphite and rare earth elements used in clean energy systems, electronics, aerospace and defence manufacturing.

"We are today signing a bilateral India-US framework on securing supply of mining and



Union External Affairs Minister S Jaishankar and US Secretary of State Marco Rubio during the signing of the framework on securing supplies of mining and processing of critical minerals, in New Delhi on Tuesday

processing of critical minerals and rare earths," Jaishankar said at the signing ceremony.

"This particular framework aims to deepen our cooperation across the entire critical minerals and rare-earth supply chain, including mining, processing, recycling, and related investments. It will certainly strengthen resilient and diversified supply chains," he said. The agreement builds on

commitments made during Prime Minister Narendra Modi's visit to Washington in February 2025, when India and the US identified secure critical mineral supply chains as a shared strategic priority.

The US Embassy described the agreement as "a milestone in the strategic partnership between the two nations to ensure that the foundational elements

required for advanced technology and energy are available within trusted networks." The statement assumes significance amid growing concerns among major economies over concentrated global control of rare earth processing and battery mineral supply chains.

According to the US Embassy, the US government is supporting critical mineral supply chain projects with more than \$30 billion through investments, loans and financing support in partnership with the private sector.

"These investments... will generate billions of dollars in new projects to secure our supply chains," the embassy said.

Rubio called the agreement "a tangible example" of the growing strategic alliance between India and the US.

"We are two countries who have a strategic interest in ensuring reliable long-term access to critical minerals and supply chains that are important for our innovation economy," Rubio said.

## CNG prices up ₹5 per kg in 12 days

SAURAV ANAND New Delhi, May 26

COMPRESSED NATURAL GAS (CNG) prices in the national capital were raised by ₹2 per kg on Tuesday, the third increase in less than two weeks, with analysts warning of further hikes of up to ₹3 per kg for Delhi and over ₹3 per kg for Mumbai as city gas distributors struggle to absorb soaring LNG prices, higher freight costs and a weakening rupee triggered by the West Asia conflict.

With the latest revision, CNG prices in Delhi rose to ₹83.09 per kg from ₹81.09 earlier, taking cumulative increases since May 15 to ₹5 per kg.

Indraprastha Gas Ltd (IGL), the country's largest city gas distributor, said CNG prices in Noida and Ghaziabad have risen to ₹91.70 per kg, while rates in Gurugram increased to ₹88.12 per kg.

The latest revision follows a ₹2-per-kg hike on May 15 and another ₹1-per-kg increase on May 23.

The increase in CNG prices also comes alongside sharp petrol and diesel price hikes by state-run oil marketing companies. Petrol prices have risen by ₹7.35 per litre and diesel by ₹7.53 per litre in four rounds of revisions since May 15.

Despite the increase in transport fuel prices, piped natural gas (PNG) used for domestic cooking remained unchanged at ₹49.59 per standard cubic metre in Delhi. In Mumbai, PNG prices continue at ₹51.50 per scm.

## Expect US deal before July 24: Commerce secy

FE BUREAU New Delhi, May 26

THE TRADE AGREEMENT between India and the US could be finalised before July 24 when the uniform 10% additional global tariffs applied by the US expire, Commerce Secretary Rajesh Agrawal said.

He said talks with the US are happening continuously and efforts are on to finalise the deal as soon as possible.

"The tariff regime has also changed. At present, there is a uniform tariff that will go till July 24. I feel before that it will be done," he said at a media event.

The US had imposed 10% additional tariffs on all trade partners from February 24 under Section 122 of the Trade Act of 1974 after the US Supreme Court struck down the reciprocal tariffs on all countries.

These tariffs can only be imposed for 150 days.

The US Supreme Court judgement also delayed the trade agreement with India as the framework that was agreed on the basis of the 25% reciprocal tariffs and 25% penal tariffs for buying Russian oil no longer existed, India is now seeking a deal that provides it tariff advantage against its competitors.

While Section 122 tariffs may go, the US has also launched a probe against its key trade partners under Section

122. He said that the FTA with New Zealand, signed in April is expected to come into force in October-November. The legal scrubbing and finalisation of the FTA with the European Union is in progress and it will be expected to be signed before the end of 2026, Agrawal said, adding that the agreement will become operational before the end of this financial year in March 2027.

## Centre to offload 2% in Coal India

FE BUREAU New Delhi, May 26

THE CENTRE WILL OFFLOAD up to 2% stake in state-run Coal India to raise over ₹5,000 crore through an offer for sale (OFS) on Wednesday and Friday.

The floor price has been set at ₹412/share for the OFS, offering a discount over the closing price of ₹458.25 on the BSE on Tuesday.

"Government of India announces OFS in Coal India Limited with a base offer of 1% of its equity and an additional 1% Green Shoe Option in case of oversubscription," the department of investment and public asset management

301 of the Trade Act to determine whether subsidy-fueled overcapacities and the use of forced labour have hurt the competitiveness of American industry.

Under Section 301, there is no limit on the extent of additional tariffs that the US can impose.

To further the discussions on the trade agreement, an Indian team of officials visited the US last month.

Next month, a team led by US Trade Representative Jamieson Green is expected to come to India to take the negotiations forward, US Secretary of State Marco Rubio had said on Sunday.

Agrawal also confirmed that the Comprehensive Economic Partnership Agreement (CEPA) with Oman will come into force from June 1.

Both sides signed the agreement on December 18 last year.

RAJESH AGRAWAL, COMMERCE SECRETARY

At present, there is a uniform tariff that will go on till July 24



## Quad to mobilise \$20 bn for key minerals

MUKESH JAGOTA New Delhi, May 26

THE INFORMAL STRATEGIC alliance of the US, India, Japan and Australia announced on Tuesday its intention to mobilise \$20 billion through government and private sectors for the development of secure critical mineral supply chains.

The meeting of the

Quadrilateral Security Dialogue (Quad) foreign ministers launched the Critical Minerals Initiative, which plans to use economic policy tools and coordinated investment to accelerate the development of diversified and fair critical mineral markets.

The funds that Quad intends to mobilise will be used to strengthen critical

minerals supply chains, including in mining, processing, and recycling. Projects that are located in Quad partner countries, operated by companies headquartered in Quad partner countries, or supplying Quad markets, that address critical mineral supply chain gaps will be supported.

"The idea is to mobilise public and private sector sup-

port and deepen cooperation in various areas, including regulatory practices, investment facilitation, recycling technologies and resilient supply chains essential for advanced manufacturing and emerging technologies," Additional Secretary (Americas Division - USA & Canada), Ministry of External Affairs, Nagaraj Naidu Kakanur said.

## Govt alert, policy action to continue: DEA secy

FE BUREAU New Delhi, May 26

AS THE WEST ASIA conflict continues to drag on, economic affairs secretary Anuradha Thakur on Tuesday said India remains fully alert to the fallout and will continue economic reforms alongside coordinated policy actions to deal with the evolving situation.

"We are continuously alert, we are alive to the situation," Thakur said, addressing a CNBC Awaaz event here.

She said India had faced global disruptions in the past and had emerged resilient each time.

"We recognise that uncertainty exists in the world and its impact will continue.

"We get this feedback from investors, industries and people," she said.

Thakur noted that India entered 2026-27 with a stronger macroeconomic base than during previous episodes of global turbulence. India recorded GDP

### CHALLENGING TIMES



■ India entered 2026-27 with stronger macro base than during previous global turbulences

■ Rise in prices of fertilisers, metals, etc has also pressured cost pressures

growth of 7.6% in 2025-26, supported by domestic demand, capital expenditure and the services sector.

However, she cautioned that the situation remained challenging as crude oil prices surged sharply amid

### ANURADHA THAKUR, ECONOMIC AFFAIRS SECRETARY

We recognise that uncertainty exists in the world and its impact will continue. We get this feedback...



geopolitical tensions. She underlined the pressure on inflation, the current account deficit and government finances because India imports the bulk of its crude oil requirements.

The rise in prices of fertilisers, metals and industrial raw materials has also added to cost pressures across sectors. Wholesale inflation climbed to 8.3% in April

and digital payments continue to reflect economic activity. At the same time, growth in manufacturing and the core sector has moderated.

To cushion the impact, the government has rolled out a series of measures, including reducing excise duty on petrol and diesel, ensuring alternative sources of supplies, boosting domestic refinery output and prioritising key sectors for fuel availability support measures for MSME exporters, faster customs clearances and sector-specific credit support have also been introduced.

Thakur said India was simultaneously pushing long-term structural reforms and strengthening sectors such as electronics, semiconductors, AI-based services, renewable energy and green hydrogen. "We have to be alert and balanced," she said.

Reforms aimed at improving the ease of doing business and strengthening self-reliance would continue, she said.

# Opinion

WEDNESDAY, MAY 27, 2026

## Beyond chip plants

India's semiconductor mission must now build capability that turn manufacturing into technological resilience

**I**NDIA'S SEMICONDUCTOR AMBITIONS appear to be entering a more sequential phase. The recent Tata Electronics-ASML partnership for the Dhuleera fabrication plant and the gradual movement of several approved projects suggest that the shift from attracting investment to building capability is on track. The first phase of the government's semiconductor mission was straightforward: offer incentives, attract investors, and create the beginnings of a domestic ecosystem. By that measure, the effort has shown progress. Approved projects now span fabrication, assembly, testing, and packaging facilities, while investments running into more than ₹1.5 lakh crore have been committed. For a country that had long remained largely absent from global semiconductor manufacturing conversations, the movement has been substantial. More importantly, it has moved the discussion from whether India can participate in the semiconductor value chain to where and how deeply it should participate.

Yet the structure of these investments also reveals the practical choices the government has made. Much of the progress has come in assembling, testing, marking, and packaging facilities, alongside mature-node manufacturing rather than the most advanced chips. This is not necessarily a weakness. Semiconductor ecosystems have historically developed in stages. Even countries that today dominate the industry did not begin with the most advanced fabrication capabilities. The economics of the sector are daunting: front-end fabrication requires massive capital expenditure, specialised talent, and decades of accumulated expertise. Attempting to immediately compete at the technological frontier would have carried large financial risks and uncertain outcomes. The choice of beginning with relatively achievable segments therefore reflects pragmatic sequencing. It would have been difficult to justify a strategy that prioritised technological symbolism over commercial viability and execution.

At the same time, early indications around the next phase of semiconductor policy suggest that the government recognises that manufacturing alone cannot be the end objective. Discussions around future support have increasingly pointed towards areas such as semiconductor equipment, materials, domestic intellectual property, design ecosystems, and deeper supply-chain capabilities. The shift is understandable because semiconductor firms differ from many manufacturing industries. Strategic influence is distributed across multiple layers involving design software, equipment suppliers, specialised chemicals, materials, and highly skilled talent. Even major economies remain dependent on international networks for different parts of the value chain. Dependence in semiconductors can therefore emerge in less visible ways, like reliance on imported lithography systems, external design tools, or foreign intellectual property frameworks. Measuring progress only by the number of factories created risks offering an incomplete picture of technological capability.

For the government, therefore, the next challenge may not be attracting additional factories but deciding what comes after them. Calls for complete self-sufficiency in semiconductors may appear attractive in an era of economic nationalism and geopolitical uncertainty, but such ambitions can quickly become expensive and impractical. The more realistic objective is resilience, which means reducing vulnerabilities in critical areas without attempting to localise every element of the chain. This would require greater attention to domestic chip design, research ecosystems, advanced skill development, and support for firms building intellectual property and specialised technologies. It would also require maintaining international partnerships rather than viewing them as signs of dependence. Semiconductor policy should ultimately be judged not by whether India can produce everything on its own, but by whether disruptions in a few critical parts of the chain can leave the economy exposed. The first phase has brought factories. The next phase must create capabilities.

## Ferrari's \$640,000 EV is quite a stretch

ONE OF THE strengths of Ferrari NV's luxury business model is also a potential weakness. Nearly all of its new vehicles are purchased by existing customers.

So there was a lot riding on Monday's launch of its first EV — the \$50,000 (\$640,000) four-door Luce. The hope was such a car might extend the prancing horse's appeal beyond passionate petrol-heads, while offering a glimpse of the brand's future into internal combustion engines disappear.

Judging by the reaction of both car fans and the stock market, Ferrari might have been better served by putting its electric vehicle plans on hold. It's unusual for an auto stock to sink more than 5% following the unveiling of a new model, as happened on Tuesday. It tells us investors are now even more concerned that the Italian company won't retain its luxury cachet once more of its cars are powered by batteries rather than a V12.

For a brand synonymous with growing combustion engines, launching an EV was always going to be a delicate task. Last year some 84% of its vehicles were purchased by customers who've owned at least one Ferrari, while more than half of new shipments went to people who owned several. Many of those core buyers are likely to be skeptical about going electric.

Yes, the company continues to attract new clients — some of whom start by purchasing a used model. Yet the average age of a Ferrari customer is 52. The danger is that as the identity of the world's rich evolves — more internationally diverse, more women, more millennials and Gen Zers — so might luxury tastes. Ferrari's desire to appeal to buyers for whom technology, not horsepower, is the key criterion, is understandable. And it has shown it can enter new segments successfully — the four-door Purosangue SUV, for instance, was a smash hit.

The Luce — the company's first five-seater, as well as its first EV — is a much bigger risk, though. The mostly scathing online reaction reminds me of the backlash Jaguar encountered when it launched an electric prototype in 2024. I thought Jaguar's rough treatment was a little unfair and the British marque's reinvention as an all-electric brand was necessarily courageous.

Like the Jaguar model, the Luce's polarising design — the work of former Apple designer Jony Ive's LoveFrom firm — isn't going to appeal to everyone. Having not seen it up close yet, I'm keen to keep an open mind. I'm glad Ive has opted not to copy the trend for wall-to-wall touchscreens — the Luce's spacious interior features lots of mechanical buttons. Yet I'm surprised that after years of effort Ferrari was unable to come up with a more enticing exterior. Critics have drawn unflattering comparisons with something Honda Motor or Stellantis' Opel unit might have produced.

Ferrari has tapped the brakes on its EV ambitions amid signs that customers aren't ready to forgo combustion engines and governments won't yet ban them entirely. But it's still expecting that one-fifth of new models will be EVs by 2030.

In contrast, Lamborghini pushed back its first EV launch after concluding that demands from its customers are basically non-existent.

Resale values of Rolls-Royce's first EV — the Spectre — aren't particularly encouraging for the BMWAG-owned marque. There are recent US examples offering a hefty six-figure discount compared with the new price.

The Luce does not avoid a similar fate. Strong used values are vital to a business model that revolves around customers purchasing multiple cars.



**CHRIS BRYANT**  
Bloomberg

**A**N INVESTOR WHO has been verified once should not have to be verified again. That is the promise of portable Know-Your-Customer (KYC), and it is a promise the Indian financial system has not yet kept. Speaking at the Securities and Exchange Board of India's (Sebi) Foundation Day on April 25, Finance Minister Nirmala Sitharaman called on the regulator to deliver a seamless, secure, and portable KYC experience across the financial sector. The architecture to do so is already in statute. What is missing is the operational detail and the liability clarity that would make intermediaries willing to use it.

India's KYC obligations originate in the Prevention of Money Laundering Act, 2002, and the rules framed under it. The Central KYC Records Registry (CKYCR), operated by the Central Registry of Securitisation Asset Reconstruction and Security Interest of India (CERSAI), was set up as a cross-sector repository. Every reporting entity that completes KYC must upload the record and generate a unique identifier, which any other reporting entity can retrieve with the client's consent. The design is a shared identity infrastructure across the financial system. The practice is not. Duplication and friction persist.

Within the securities market, Sebi established its own infrastructure as early as 2011 through KYC registration agencies (KRAs), governed by the SEBI (KYC Registration Agency) Regulations, 2011, and the Master Circular on KYC norms for the securities market. Under this framework, the first Sebi-registered intermediary onboarding a client conducts due diligence, uploads the records to a KRA, and retains the documents, following which subsequent Sebi-regulated intermediaries retrieve these records instead of initiating the process afresh. The KRA system has been in place for over a decade and has materially streamlined onboarding within the securities market. That said, the

framework continues to be subject to structural constraints. The first constraint arises at a cross-sector level. Portability under the KRA framework is confined to Sebi-regulated intermediaries, with no seamless mechanism to extend this across other regulatory domains. As a result, a client whose identity has been verified by an RBI-regulated bank cannot have those records readily accessed by a Sebi-regulated broker through the same channel. The CKYCR was intended to address this gap, and, in principle, provides the necessary bridge. In practice, however, its effectiveness across sectors remains limited. The reasons are operational — data standards are not aligned across regulators and there is no standardised digital consent mechanism for retrieval. It results in investors continuing to re-submit documents multiple regulatory boundaries.

The second constraint arises within the securities market, at the level of financial groups. A group offering distribution, advisory, and broking services typically operates through separate Sebi-registered entities. Each is required to retrieve the client's KYC record from a KRA on onboarding. Market practice is not uniform. Some groups initiate separate KRA pulls for each entity; others rely on a single pull and share the record internally. Neither approach has clear regulatory backing, and the framework does not settle the point. The

result is multiple identical pulls of the same record across a group's product suite, with cost and delay but no regulatory benefit. Different categories of KYC information are governed by different sharing rules. Core identity and verification data uploaded to KRAs can be accessed only through a KRA pull. Other due diligence information, such as risk assessments and source-of-wealth documentation, sits outside the KRA framework and may be shared internally under group policies. The boundary isn't clearly drawn, and market participants do not apply it consistently. Both constraints reduce to the same point — the records exist, the verification has been done, and what is missing is a mechanism to reuse them.

The PM's push must translate into reform at two levels. At the cross-sector level, the CKYCR must be made to work. The infrastructure is in place: CERSAI operates the registry, reporting entities are required to upload to it, and the PM's rules contemplate retrieval by any reporting entity with the client's consent. What is required is alignment. Data standards across regulators must be harmonised so that a record acceptable to an RBI-regulated bank satisfies a Sebi-regulated broker. The consent mechanism must be standardised and made digitally operable, so the client can authorise retrieval once at onboarding rather than

**Clear regulatory stance needed on the extent to which reliance in good faith on verified KYC can satisfy KYC obligations**

separately for each pull. Most importantly, the liability question needs to be addressed directly. Under Rule 9(2) of the PM's Rules, a reporting entity that relies on a third party's due diligence continues to bear full responsibility for compliance with its KYC obligations, even where the underlying records have been verified by a regulated entity and uploaded to a government-operated registry. This allocation creates a disincentive, as intermediaries may prefer to undertake fresh verification rather than rely on third-party records. A clear regulatory position is required on the extent to which reliance in good faith on verified CKYCR records can satisfy KYC obligations. Such clarity would materially improve portability, more so than incremental improvements to registry infrastructure.

Within the securities market, Sebi may consider issuing clear guidance on the conditions under which a single KRA pull by one group entity satisfies the obligation for other entities in the same group. Clarity on the distinction between KRA-stored information and other due diligence information, along with the applicable sharing channels for each, would further support consistency in practice. Without this, divergent market practices will persist, with the conservative players bearing unnecessary costs and the aggressive ones operating without a clear legal basis.

Portable KYC is not a technology problem. The registry exists, the records exist, and the statute already contemplates reuse with the client's consent. What is missing is the legal comfort that reliance in good faith on those records will not be second-guessed. Fix the liability rule, harmonise the data standards, and the rest will follow. The infrastructure has been built. It is time to let it work.

Co-authored with **Pranjiv Kijjavadekar and Yash Vardhan**, Associates, *Finesec Law Advisors*. Views are personal

## SANDEEP PAREKH

Managing Partner, Finesec Law Advisors



PORTABLE KYC ARCHITECTURE IN PLACE, OPERATIONAL DETAIL & LIABILITY CLARITY MISSING FOR INTERMEDIARIES

# KYC, with a memory problem

## Revisiting road asset development models



### SAMUEL JOSEPH JEBARAJ

Deputy MD, Lending & Project Finance, National Bank for Financing Infrastructure and Development

Pausing hybrid annuity model and awarding BOT capacity and capability to estimate revenue risks

**R**OAD ASSET DEVELOPMENT models have come of age, with many private equity (PE) platforms finding comfort in the operational histories of assets. Organised capital has aided the sector's growth and development potential. And it is primed for more, with developers being able to free capital by selling aggressively to infrastructure investment trusts, asset managers, and PE platforms.

Yet, somewhere there has been a slowdown — in both public-private partnership (PPP) and engineering, procurement, and construction (EPC) modes — leading to reduced kilometres awarded in FY26. Aggressive bidding compared to benchmark costs, right of way availability issues, clearances during construction, and securing of financial closure have delayed projects. They bring out the ugly dimension of cost escalation, deadline extensions, and disagreements leading to claims.

Discounted pricing followed by small construction contractors winning bids and their exit has led to the tested hybrid annuity model (HAM) stripped its life. The discounted model would work only if land, project clearances, approval of design and drawings, utility shifting approvals and plans, equipment and manpower, financial closure, and capital are available on day 1 itself. This is never the case in most projects.

Late last year, the government took a bold step in revising the eligibility criteria for contractors, both on technical (ensuring experience fits project requirements) and financial (enhancing net worth criteria and streamlining

security needs) terms. However, key changes are necessary.

Technical capacity: Bidders must have experience of handling projects of similar scale and complexity (the definition of "similar work" is stricter, demands completed project to include all major components of the proposed project within the last 10 years). Secondly, joint venture members must individually meet higher thresholds: 35% of the project cost for one similar work or 25% each for two similar works.

Financial capacity: Net worth requirements must be standardised to 5% for projects up to ₹100 crore and 10% for those above ₹100 crore. It should incorporate a net worth adjustment mechanism for existing commitments in PPP projects. In essence, 20% of balance value of existing PPP commitments will be reduced from the actual net worth. Secondly, the average annual turnover must match amounts specified in the notice inviting tender, generally based on the last three years. Attaining bid/performance security through third-party enhancing accountability should be prohibited. Lastly, additional performance security (APS) must be applicable where bid projects are 90% of the authority estimates and lower. The APS increases with every percentage increase in project cost, with no cap.

The changes brought about (currently under review) in the model concession agreement will also help introduce an element of balance in setting expectations around implementation and operations. Some key aspects are as follows: Better transparency: Clarity on appointed date with 90% of land to be handed to the concessionaire and clarity on scope of works if the complete land required to construct the project is not handed over. If complete land is not handed over by the appointed date, the scope of work on balance land is subject to change of scope (COS) clause as per the concession agreement.

Improved viability: Open to providing construction support, in case existing alignment is under tolling. The support will be released in 10 performance-based execution milestones.

Mitigating risk of time and cost overrun: Super delays from concessionaire lead to termination of concession as per the contract clause, to avoid litigation. Mitigating COS costing disagreements: Clarifying the process of COS and cost approvals, which are at the heart of disputes over quantity and costs as per applicable schedule of rates. Easier interpretation of quantum of termination payments: Clarifying the definition of debt due during the tenure of the contract till transfer. Documented bill of quantities-led

work execution weightage. Detailed technical bill of quantities included in proportions of the contract price to the EPC contractor for different stages of construction of the project highway.

Better transparency: Escrow bank to provide account viewing and downloading rights to authorities and lenders can seek inspection reports. Monthly progress reports to be more descriptive with data on real-time movement of construction vehicles, etc.

Traffic risk mitigation: Traffic variation and competing roads — adequate compensation through increase/decrease of concession period, in case traffic on the stretch reduces/increases as per traffic variation clause/contours.

While FY26 witnessed muted awards in road projects, particularly those in PPP mode, FY27 is likely to see a reversal.

As of April 30, MoRTH/NHAI/NHIDCL tenders that have been announced or were due for submissions in the subsequent weeks include a pipeline that is reworking tenders PPP modes of award. However, it is time the authorities reflected on the HAM awards and outcomes in the last two years and did a course correction.

Pausing the popular HAM model and awarding build-operate-transfer (BOT) (toll) projects is the need of the hour, as it will attract developers who have the execution capacity and capability to estimate revenue risks and bid for projects accordingly. Such a step will not only increase the kilometres awarded but also attract good developers in building quality roads.

## LETTERS TO THE EDITOR

### Funding Indian AI

Apologies of "Funding riddle for desi AI" (FE, May 26), the absence of patient, long-duration domestic capital willing to back deep-tech at the foundational layer is not merely a funding gap. It is a capability gap with accompanying consequences. The suggestion to route portions of provident and pension funds and institutional pools into qualifying AI infrastructure is sound in principle. The regulatory hesitation is

understandable but not indefinitely sustainable. Regulators could design a fund-raised, ratings-linked instrument that allows gradual institutional participation without compromising fiduciary obligations. India cannot outsource the capital layer of its own AI ambitions and expect strategic sovereignty to follow. —M Barathi, Bengaluru

### Fuel price hikes

The Modi government has hiked fuel

prices four times within a span of 10 days — a record of sorts. Initially, the government contended that the rise of ₹3 per litre was "very small" and "modest". But the subsequent hikes have cumulatively made it costly by ₹7.5/litre — the government has asked the people to put up with it as a "patriotic duty". Starting hikes that proved to be no great grace to the people, especially the poor. The hikes and their spillover effects on almost everything from food to fertiliser make

a big hole in the savings of the common people by hugely affecting their household budgets. The government defends the hikes, saying they are market-driven moves by oil-marketing companies in response to "soaring" global prices due to the West Asian conflict. It does not assure us that it will spare us further increase in the fuel prices. —G David Milton, Maruthancode

Write to us at [letters@expressindia.com](mailto:letters@expressindia.com)

OUR VIEW

GUEST VIEW



# India's industrial policy requires a reality check

The government should review its incentive scheme for factory production. Broadly, it must let the market shape outcomes in sectors where this won't go against our strategic interests

The West Asia crisis has prompted India's government to pursue a swathe of measures to help the economy weather its fallout. On the country's consumption of imports, a key focus of this exercise, these efforts straddle the spectrum from austerity to efficiency, given the burden of import bills inflamed by the war's oil shock and its knock-on cost surge. Prime Minister Narendra Modi has also led a behavioural nudge, asking for belts to be tightened. Export relief moves, a stabilization fund meant as a fiscal buffer and a credit backstop for small businesses are also part of this defensive response. All this, however, may not do much to alleviate macro adversity in the broader context of a weakening currency amid waning investment interest. The policy spotlight thus must fall on initiatives that motivate firms to build factories that are not just efficient, but also resilient in the face of a global trade order all but taken apart by a US tariff blitz.

To be sure, efforts have been afoot. To catalyse manufacturing growth, the Centre recently announced a scheme to develop 100 'plug-and-play' industrial parks across India. Moves to make it easier to do business and fast-track infrastructure projects for competitive logistics complement India's flagship industrial policy, the Production-Linked Incentive (PLI) scheme—which aims to ramp up output and create jobs in select sectors that market forces were not yielding on their own. The results thus far, however, have been mixed. Smartphones can be hailed as an export success, but a broad look reveals a disappointing record. Plants have come up, but patchily, with less than half the expected investments maturing. In several cases, the government has had to claw back

payments for failures to meet PLI conditions, as seen in the scheme to make batteries that hold far more electricity than conventional ones. Overall, the scheme has done little to increase the factory sector's share of GDP. Today's global turmoil makes this a good moment to review this policy. For this, a three-box checklist would help. *First*, any redesign must be functionally leak-proof to prevent wasteful PLI flows. *Second*, it must be in sync with a nuanced policy framework of self-sufficiency. Some PLI projects involving foreign collaboration do not entail technology transfer; if they are largely assembly line operations, as with mobile handsets, then value addition and skill absorption remain slim. The cataput we need requires far broader engagement, especially if digital autonomy is a key national goal in a world of tech denial. Public money should hence largely go where today's crutch can be tomorrow's scaffold for a homegrown mega-success. *Third*, all support must serve ends that are in harmony with India's strategic needs. India's chip subsidy seems outsized (all taken into account), but it meets this bar. Not only are silicon chips part of a geopolitical game, we must minimize the risk of exposure to foreign bugs or control devices.

The ability of industrial policy to whip up local manufacturing has long been a debate, but few can doubt that the odds of international success are shaped by global competitiveness and export-market openings. As China suffers overcapacity and a price slump, for example, European car-makers are investing more there to ship China-made vehicles to their home markets. It's the market at work. India too should rely chiefly on cost-optimizing market motives to direct production, even as it sharpens its industrial policy.

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India's climate debate still revolves largely around energy, emissions and infrastructure. But corporate India has an obvious immediate challenge to contend with: how to keep people working safely in a hotter and more flood-prone country. Extreme heat and frequent flooding are no longer occasional disruptions. They are beginning to affect labour productivity, supply chains and operating costs across sectors that depend heavily on informal and contract workers. Construction, logistics, warehousing, transport, delivery networks and small manufacturing are especially exposed because much of their workforce operates outdoors or in poorly protected environments.

Rising heat is already reducing work hours and lowering productivity. Research on informal workers in Delhi found that income dropped sharply during periods of extreme heat as workers slowed down, stopped work or fell ill. Flooding creates a different but equally expensive problem. Waterlogged roads delay deliveries, disrupt

transport and prevent workers from reaching factories, warehouses and construction sites. In cities where supply chains depend on daily movement and thin margins, even short disruptions can ripple through production systems.

Businesses are beginning to recognize this risk. A climate resilience report by the Confederation of Indian Industry notes that companies increasingly face losses linked to heat stress, heavy rainfall and supply-chain disruption. Some firms are busy adapting. Companies exposed to climate risks are diversifying suppliers across regions so that floods or heatwaves in one location do not shut down operations.

But diversification alone will not solve the larger problem. India's climate exposure includes the risk of high humidity to go with heat, which makes it harder for the human body to keep cool through the evaporation effect of perspiration. This exposes workers in textiles, construction, steel and other sectors to heat stress. If workers cannot operate safely for long periods during heatwaves or floods, businesses suffer. This calls for a shift in how companies think about adaptation.

Much of corporate India treats climate resilience as an infrastructure or disclosure issue. In reality, workplace adaptation may

THEIR VIEW

# Climate change augurs a corporate productivity crisis

soon become just as important as energy transition targets.

Some solutions are straightforward. Heat-safe workspaces with shaded rest areas, hydration points and scheduled cooling breaks can reduce productivity losses to extreme heat. Companies engaged in construction, warehousing, logistics, etc. also need new operating protocols, including night shifts during severe heat phases. The same goes for flooding risk. Businesses dependent on rapid movement of goods need flood-resilient logistics systems, decentralized warehouse networks and stronger backup transport arrangements.

There is also an investment angle. Research by the Climate Policy Initiative points to rising interest in cooling infrastructure, climate-resilient services and adaptation-focused technologies. These allocations are often discussed as sustainability measures. But they should be viewed as productivity investments. Corporate India may also need to rethink how corpo-

rates social responsibility and environmental, social and governance budgets are used.

A large share of climate-linked spending goes towards visible environmental projects. Yet, adaptation efforts focused on workers and supply chains may deliver more immediate returns. Cooling for labour-intensive workplaces, flood protection for industrial clusters and climate-risk support for small suppliers should be business priorities. This goes well beyond worker welfare as it is about operational continuity.

The challenge sits awkwardly within India's current policy framework. Heat action plans in many cities remain focused mainly on emergency response and public health advisories. But climate risk is now affecting sectors dominated by informal and contract labour.

Labour regulation in India largely assumes a formal workplace model centred on factories and registered establishments. India's Occupational Safety, Health and Working Conditions Code expands workplace safety

provisions in some areas, but climate-linked risks for informal and gig workers remain weakly addressed in practice.

State governments could also use tax incentives, concessional financing and procurement rules to encourage private investment in climate-resilient workplaces and logistics systems. Cities need to play a major role too. Urban adaptation plans that improve drainage, transport resilience and worker access during extreme weather may increasingly become an economic aspect of climate policy.

India's climate vulnerability was once viewed as an environmental story. It is now becoming a workforce story, a productivity story and therefore a story of corporate performance. As heatwaves join higher levels of humidity across large parts of India, raising the spectre of 'wet-bulb' heat, companies that adapt early may discover that climate resilience is not just about avoiding disruption. It is about protecting the workforce that keeps the drivers of India's economy moving. The country's next phase of growth will depend on its infrastructure build-up and investment flows as much as on whether millions of workers that lack ambient air quality control can work safely and productively in less comfortable conditions.



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India's fertility story first reached a turning point five years ago, when the National Family Health Survey-5 for 2019-2021 showed the country's total fertility rate (TFR) had fallen to 2. The average number of children a woman bears was below the replacement rate of 2.1 half a decade ago. Last week, the Sample Registration System (SRS) Statistical Report for 2024, published by the Office of the Registrar General of India, revealed the pace of decline. In 2024, our national TFR fell to a little under 1.9. The speed at which we are undergoing a structural demographic transformation will have consequences for the economy, labour market, healthcare system and social dynamics.

The TFR measures the average number of children a woman would have over her lifetime at current birth rates. Globally, this replacement level is cited as 2.1 children per woman, but in India the figure is reckoned by some to be slightly higher at 2.15, given a distortion in the country's sex ratio at birth (SRB) caused by troubling gender-selection practices. According to the latest SRS report, India's SRB stands at 918 females per 1,000 males, a marginal improvement from 907 in the 2018 to 2020 period, but still skewed. Since fewer girls are born, more births per woman are required for population stability. But our TFR is likely to slide further.

In 1985, India's TFR was 4.3 and has fallen at a rate of about 0.06 per year and there is no sign that this decline will reverse. At the current pace, our TFR is projected to drop below 1.6 by 2031. America's current level. By that point, the fertility gap relative to replacement will be so substantial that a headcount contraction in time to come would look unavoidable.

However, the national TFR figure masks regional differences. India does not have one demographic story. It has many. Kerala's TFR at 1.3 is approaching the levels of Italy and Spain, societies that have been grappling with a demographic decline for decades. Delhi, as a metropolitan anomaly, records an even lower TFR of 1.2, although its unique migration dynamics make direct comparison with states difficult. At the other end of the range, Bihar's TFR is at 2.9, above the replacement rate and reflective of differing social, educational and economic conditions. The distance between Kerala and Bihar is not merely geographical. It represents perhaps a whole generation's demographic transition. The rural-urban divide tells a similar story. While India's rural TFR was 2.1 in 2024, its urban TFR dropped to 1.5. As urbanization continues and rural areas increasingly adopt urban economic patterns and social norms, this split also suggests we should expect a decline. The urban figure may be a preview of India's demographic future.

The 2024 SRS report extends beyond fertility data, offering a comprehensive picture of India's vital statistics.

**Infant mortality:** This rate has declined to 24 deaths per 1,000 live births, a drop of six points over five years. Kerala leads the nation with a rate of just 8, a figure comparable to developed economies. For children under age five, the 2024 rate was 28 per 1,000 live births.

**Crude death rate:** The SRS puts it at 6.4 in 2024, which is still higher than pre-covid levels.

**Causes of death:** Two of these have

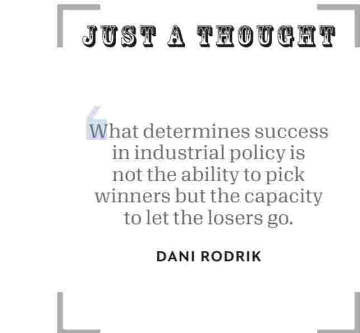
recorded notable increases. Deaths from motor vehicle accidents account for 3.2% of total deaths, while deaths by suicide make up 2.8%. Both warrant serious attention.

**Headcount outlook:** India's population will continue to grow in absolute terms for some years. We have population momentum: a large cohort of working age adults will continue to have children, fewer than previous generations but enough to sustain numeric growth, while life expectancy continues to rise. These two forces will together delay an absolute population decline. But the TFR drop is bound to show up as the family-size choices made today will determine the size of India's working age population between 2045 and 2060. We can expect a shrunk workforce even as pension systems and the like come under strain; an ageing society may place other demands on India's fiscal apparatus as well. A clearer demographic picture will emerge once new Census data is published next year.

India's TFR decline is part of a wider global story. The rate has been observed to decline in line with economic development, female education and urbanization. The same pattern is evident in Japan, South Korea and China to Brazil, Iran and European countries.

Whether India can chart a unique path that will lead to a different destination is unclear. Our fertility data from 1985 to 2024 describes a straight downward trend. State intervention by way of pronatalist policies in other countries has proven ineffective. If anything, what's debatable is how rapidly India's TFR will drop, what level it might eventually stabilize at (if it does) and how regional patterns will converge. Apart from Bihar, only Uttar Pradesh, Madhya Pradesh, Rajasthan, Chhattisgarh and Rajasthan had above-2.1 TFRs in 2024.

India needs an in-depth conversation on its demographic inflection. The SRS Statistical Report has provided updated data. An analysis, a debate and then a policy response must follow.



What determines success in industrial policy is not the ability to pick winners but the capacity to let the losers go.

DANI RODRIK



THEIR VIEW

MINT CURATOR

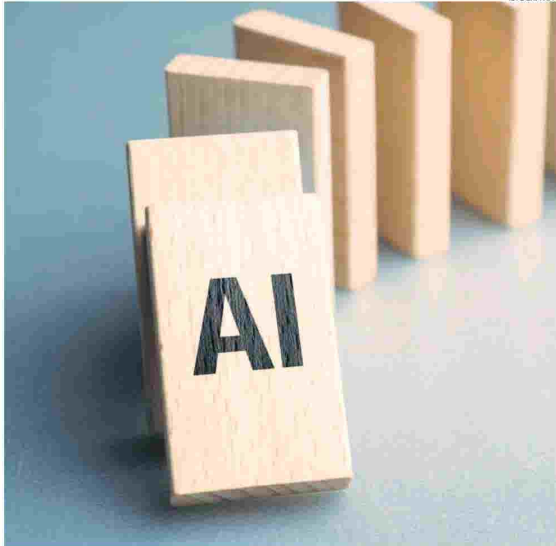
# The artificial intelligence mania may well be in for a cold shower

Huge investments led by euphoric visions of exceptional profits could go wrong and result in a shake-up of the AI industry



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Artificial intelligence (AI) tools will undoubtedly transform the nature of work. Large language models (LLMs) can already generate referee reports on my own research papers that rival those by human referees. Unlike humans, who are pressed for time, an LLM 'knows' or can access much more of the literature in an instant, and often exhibits fewer biases. AI points out my analytical weaknesses, checks proofs and makes suggestions for improvement. Only rarely are human reports better, typically because they connect the dots and offer new insights.

Nonetheless, the market euphoria around AI has become worrisome, especially given the extent of large-scale debt issuance by the sector. It is therefore worth considering where in the AI supply chain things could go wrong.

The supply chain starts with producers and designers of AI infrastructure: firms like TSMC and Samsung, which fabricate chips; Nvidia, which designs them; and Cisco, which provides connectivity. Then come hyperscalers like Amazon, Google and Microsoft that are building data centres both for the use of their own AI models and in order to sell compute (processing power) to others. There are also more specialized companies like Equinix (data centres), and, of course, Anthropic and OpenAI, developers of foundational LLMs.

Finally, there are the individual and corporate users of AI services. Individual use is growing fast, and corporate use in some areas (software development and customer support) is exploding. But most large businesses, while experimenting intensely, have yet to implement end-to-end uses. Many still need to organize their historical data to train AI for their own purposes and restructure their traditional operations so that AI can be deployed to improve with experience. Moreover, many firms rightly worry about data security. AI errors and hallucinations that could destroy their brand image. Still, as less conservative younger companies find more AI uses, they will put competitive pressure on older, larger firms to change.

The AI rollout could nevertheless get interrupted in a number of ways, generating risk for debt-funded players. For instance, if graphics processing units, CPUs and memory chips become faster and more energy efficient, the equipment in existing data centres could depreciate rapidly, making it harder for them to amortize their costs. And LLMs, which have become extraordinarily capable based on what is essentially next-word prediction, could plateau until some new technique emerges.

For now, AI labs are investing massive sums to train newer and larger models on the assumption that the first model to reach some magic point where it becomes self-improving will rule the AI

world and reap enormous profits. But this scenario seems implausible. Even if there is such a point, competitors could still match the first mover's model (including by hiring away key employees to obtain technical secrets). So far, no AI model seems to have gained a sustained advantage. Unless Gemini (Google), Claude (Anthropic), and ChatGPT (OpenAI) can eventually differentiate themselves by appealing to specific user segments (or by merging or colluding), it is hard to see where the profits justifying their enormous training investments will come from.

Moreover, although politicians have been largely standing on the sidelines so far, policy interventions to address AI risks and concerns are inevitable. Since data centres consume huge amounts of power—driving up the power price for everyone—state and local governments will be under increased political pressure to limit their construction. In Indiana, for example, multiple counties recently proclaimed a moratorium on data-centre construction.

Projections into next year already suggest that hardware makers and data centres will be unable to supply enough US compute. And as shortages of compute mount, end users will have more reasons to delay implementation. You cannot reorganize all your operations around AI if you have reason to worry about the reliability of access or reasonable pricing in the future.

Worse, whereas broader use may take longer than many expect, malevolent use by hackers and deepfakers, as well as unsupervised use by children, is growing rapidly. It is not hard to imagine disaster scenarios—such as a deadly cyber incident, gross data misuse by AI agents or poorly trained AI models advising children to commit acts of violence against themselves or others (some-

thing that has already happened). The chorus demanding regulation and more liability for AI models will only grow louder. The risks posed by rogue AI could even prompt a sorely needed dialogue among major powers, perhaps leading to some kind of AI Geneva Convention.

Perhaps the most important trigger for political intervention would be massive AI-related job losses. Fearful of the political or social backlash, even firms that are inclined to adopt AI may be hesitant to shed redundant employees outside of a recession, reducing any gains from AI deployment and diffusion.

Given all these uncertainties, it is far from clear how widely and quickly AI will be rolled out, and who will profit. Hardware makers and designers seemed well positioned, given the tremendous demand for compute. But if data-centre construction is interrupted, that could shift profits to hyperscalers and AI labs. They might reduce the amount of compute dedicated to training better models, which gives them only fleeting advantages, and shift to selling the compute they have sewn up to firms using their already capable models. Such shifts are also likely if model capabilities plateau. Regulation might also force modelers to spend more effort on improving the training and safety of existing models, building broader public trust.

The good news is that a more limited, careful AI rollout could give firms more time to find labour-augmenting (as opposed to displacing) uses, and governments and workers more time to adjust. The bad news is that euphoric visions of quick exceptional profits could be unfounded, a particular problem for AI firms that must make unforfeiting debt payments. AI advances will likely pay off eventually. But not every provider will profit, or even survive.

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# AI embrace: Japan's late start may be a blessing in disguise

The country could learn from the mistakes made by first-movers



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The country can watch, learn and adapt what works.

In the US, the backlash to artificial intelligence (AI) seems to be scaling almost as fast as the technology itself. Japan offers a different case study. The country has been slow to adopt AI, but it seems unusually calm about it. From the outside, its late start is easy to dismiss as another sign of digital underperformance. It may instead prove a valuable opportunity to skip some of the messier, early phases of diffusion that have been marked by hype, risk and expensive experimentation.

Japan can learn from first-movers and skip to the impactful part of turning the technology into economic infrastructure. AI has the potential to be more practical than performative here: there is less angst about displacing workers when the labour force is shrinking. Some of the nation's issues, from how to care for an ageing population to language barriers and software gaps, are exactly the kinds AI can solve.

Diffusion, meanwhile, is finally picking up. During the first quarter this year, AI adoption in Japan rose 3.4 percentage points, over three times faster than the global average, according to Microsoft's AI Economy Institute Q1 report. Separate data from Docomo found usage nearly doubled between this February and last.

In a country long admired for hardware but less so for software, engineers are using AI to narrow the gap. The Microsoft report found that developers in Japan uploaded 129% more code changes to GitHub than a year earlier, compared with the global average of 78%—a signal that the technology is already changing how coders work.

Global tech companies have noticed. A new wave of entrepreneurship is taking place in Japan and "we want to be part of the story," Dmitry Shevelenko, chief business officer at Perplexity AI, told me recently. He's far from alone as the likes of OpenAI, Anthropic and others are opening offices.

Yet the country remains relatively insulated, and there is still hesitation about going all-in with foreign institutions. Companies that want to be a part of Japan's AI transformation should act like long-term stakeholders, hiring local staff and offering serious partnerships. This could also mean fostering deeper collaborations with universities and research communities. Scientists remain one of the few groups in Japan that still command high public trust, according to an Edelman survey. AI firms that want credibility should borrow less from Silicon Valley's hype machine and more from Japan's institutional ecosystem.

Still, as Shevelenko puts it: "If you're successful here, it's a real signal to the rest of the world that you've built something of incredible quality." He's correct that this discernment is an edge. Business leaders should also focus less on promises of future abundance and more on urgent, practical problems (one reason Silicon Valley's pitch no longer resonates so easily in the US). In Japan, tourism is an obvious example. AI could do much more than translate menus. It can build smarter itineraries, redirect travellers to regions that still need visitors, smooth congestion and help spread the record inbound demand beyond the same crowded destinations.

Tokyo has favoured a light-touch regulatory approach, with the goal of becoming the most AI-friendly nation in the world. But policymakers should also recognize the advantage of playing catch-up. Japan can watch, learn and adapt what works. This is especially true in higher-risk bets like Agentic AI, where you hand off more autonomy to machines.

None of this guarantees success. Japanese corporate culture remains cautious and the current consumer curiosity does not automatically translate into broader transformation. Business leaders and policymakers are right to encourage startups, but they must extend support to smaller and medium-sized firms. In addition, mid-career and older workers are still less likely to use the technology though they remain a large swathe of the labour force.

Japan's most famous tech investor, Softbank founder Masayoshi Son, is making one of the world's boldest bets on the technology with a \$60 billion commitment to OpenAI. Whether that provisionary or reckless remains to be seen, but the time horizon is instructive. On Softbank's most recent earnings call, its CFO said the company is looking at the next 30 years, adding, "The AI revolution has only just begun."

For Japan, the long view is the right one. The current frenzy creates a FOMO pressure to spend big now and justify later. But if AI is truly a transformative general-purpose technology—more akin to the steam engine that propelled the Industrial Revolution than a new smartphone app—the winners will not be the ones who sprint first. They will be those who do the marathon task of embedding it deep across the economy.

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MY VIEW | EX MACHINA

# What does it mean if AI can write as well as humans?

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Last week, the internet was abuzz with allegations that this year's winner of the Commonwealth Foundation prize for Caribbean regional short fiction had been written using artificial intelligence (AI). Not only had the winning story, 'The Serpent in the Grove,' passed through several rounds of internal review before being selected as the winner from over 7,000 submissions, it had also been published in *Grazia*, a literary magazine that has carried work by the likes of Ishiguro, Rushdie and Zadie Smith.

The public response to these revelations has spanned the full range of emotions—from indignation at the author for trying to pass his work off as original to anger with the technology itself for encroaching upon a domain that many believe must always remain the preserve of human wordsmiths. But the more we try to find traces of AI in what we read, the less time we have to understand all that it can do for us. I spent the last month trying to figure out just that. The immediate consequence of last

week's events will be excessive caution. Editors, publishers and juries around the world will run every submission they receive through AI detectors to make doubly sure of the provenance of whatever they select, but since those filtering techniques are themselves probabilistic, there is every likelihood that at least a few pieces of human writing will also get caught in the dragnet.

This is exactly what we should not be doing. Given the rapid pace at which AI has improved in the last year alone, this may well be the last time we will be able to detect the hand of AI in what we read. Rather than blame an award jury for not being able to tell whether what they were reading was crafted by AI, we should be reflecting on what it means for writing now that AI is good enough to trick the most discerning of us.

Attempting to ban AI-use for writing, as many are keen to do, would be futile. AI is a tool and writers have always used tools to enhance their craft. Each time a new technology has become available—when we switched from legal pads to typewriters and then from typewriters to word processors—there have always been those who warned that no good would come of adopting these new-fangled techniques. But we went ahead anyway, learnt the new possibilities these

tools enabled and expanded our craft in wondrous ways.

Sure, AI is in an entirely different class as a tool. Every other tool that writers use helped produce content. AI is the first that can actually create it. If the quality of what it makes is disappointing, it is because we are still learning to use it. With a little time and practice, that will change. Once we have mastered its use, AI-generated content will be as good as anything we produce ourselves.

As regular readers of this column will attest, I have been using AI to assist my writing long before it was popular. When I first wrote an article entirely with AI as a gimmick, it was hard to get it to pass as even vaguely human that I had to painstakingly prompt the article into existence one sentence at a time.

Since then, I have incorporated AI into my process in as many ways as possible—to the point where I can no longer tell which part of my article came from AI and which did not. I use it for research, for fact-checking and to

find the exact right words to use to make the most convincing argument. The more I use it, the more surprised I am at how rapidly it continues to improve.

But because I use it so much, I am also acutely aware of all it cannot do. AI conversations are constrained by what they can hold in active memory. Modern models claim context windows of up to a million tokens, but coherence degrades long before the window fills. Characters drift, plot threads slip and what was established in chapter two no longer shapes chapter 12. Which is why, when friends in publishing lecture me about the shortcomings of AI, I stay silent—a full-length AI-generated book is still hard to create.

## Last week's literary scandal should make us reflect on the future of writing with AI assistance

Last month, I decided to see if that was still true. Has AI advanced enough for me to fashion a writing system that can produce book-length fiction entirely on its own?

To properly validate this thesis, I forced myself to work under a single, clearly defined constraint: not a single word of the final text

could come from me. While I could provide feedback on whether a given passage worked or not, much like a human editor working with an author would, I would not, under any circumstances, tell the model to include specific words or phrases in the text.

In 10 days, we were done. Starting from a single prompt that offered broad suggestions on plot, we were able to produce a 75,000-word book. It took multiple conversations back and forth to work out the structure, characters, locations and narrative devices, and several iterations to address internal consistency, but in the end, every word of the final product was generated by AI.

You can read it, in full, at [the-recognition-problem.com](https://the-recognition-problem.com) where the entire story has been laid out, chapter by chapter, on a website built by AI. In the 'Making' section of the website, there are details on how I created it, the scaffolding I built and the story bible that served as the 'long-term memory' that AI lacks. And, for those who care about these things, the argument I had with Claude over who should claim authorship is over it.

This is not the best book you will read this year. It will not win prizes or commendations. It is, however, an example of what AI is already capable of. And a sign of things to come.

OPINION

OUR TAKE

Restatement of the Quad vision

The New Delhi meet is a reassurance that the grouping has not lost sight of the original intent

India and the other members of the Quad grouping will walk away from the foreign ministers' meeting in New Delhi reassured about the commitment of the US to the Indo-Pacific project, especially at a time when President Donald Trump has conveyed mixed signals on his plans to rebalance ties with China.

The Quad Initiative on Indo-Pacific Energy Security, proposed by the US and aimed at helping countries in the region to enhance their energy resilience through the creation of reserves and assistance in procuring energy, is perhaps the most significant new deliverable to emerge from the foreign ministers' meeting.

Though Japan and Australia publicly lauded the US's commitment to the Quad framework, the truth is the grouping has struggled to agree on the holding of a leaders' summit in India for well over a year.

Lessons India's education authorities need to learn

The Supreme Court's anguished observation about education authorities "failing to learn lessons" comes in the context of the recent National Eligibility-cum-Entrance Test (NEET) question leak and cancellation.

However, the apex court's remonstrance applies to the general cohort of education regulators in India. Just days after the NEET episode, the Central Board of Secondary Education (CBSE) is measure to ensure a transparent board examination re-evaluation process suffered several glitches and discrepancies.

All these instances — and many others at the state level — undermine the confidence of the student community (and, indeed, the larger population) in the state of education regulation in the country.

A legal band-aid on a much deeper wound

The Andhrabi order's criticism of indefinite pre-trial incarceration is welcome. Justice requires a thorough interrogation of the UAPA, and of all laws that facilitate jailing for long periods based on mere accusations

For a long time, it has been clear that there is something fundamentally broken about the operation of the Unlawful Activities Prevention Act (UAPA).

Two things contribute to this. The first is the general malaise of India's criminal justice system where criminal trials take years (or even decades) to complete.

Another set of decisions, however, has the effect of turning the UAPA into a rigid charter for endless jail-time.

Running the last kilometre on eradicating tuberculosis

Nobel laureate Ronald Coase suggested that every solution creates a new problem. India's economic liberalisation of 1991 reduced poverty but shifted us from infectious to lifestyle diseases.

India's progress in the last decade is impressive. TB incidence is down 21%, mortality 28%, and coverage is up from 50% to 92%.

Caused by Mycobacterium tuberculosis — a bacteria discovered by Robert Koch 144 years ago — the eradication of the "forgotten plague" is within India's grasp.

Policy: Current incentives reward detection and notification, but not treatment success or patient well-being. Flip the incentives.

Integration: Under-nutrition and anaemia are not comorbidities; they are facilitators of TB. Mental health is not peripheral; it determines adherence to treatment.

CURRENT INCENTIVES REWARD DETECTION AND NOTIFICATION, BUT NOT TREATMENT SUCCESS. FUNDING — FOR PUBLIC SYSTEMS AND PRIVATE PROVIDERS — MUST BE LINKED TO OUTCOMES

A combination of these two factors means that once accused of a UAPA offence, individuals are condemned to long years in jail without trial.

Unfortunately, the basic architecture of the UAPA — which itself is borrowed from previous anti-terror statutes such as the infamous TADA, which, in turn, borrowed it from colonial-era Emergency laws — has largely been sustained by the courts.

One crucial arena of contest has been the issue of delay. As noted here, criminal trials in India — and especially, trials under the UAPA — take years or decades to complete.

In 2021, in a judgment called KA Nijeb, the Supreme Court acknowledged that at some undefined point,

pre-trial incarceration violates constitutional rights to life and personal liberty. The Supreme Court did not provide a specific time when this was so; perhaps this is for the best, as one can easily see how providing a specific time would encourage judges to simply deny bail as long as that threshold time had not yet passed.

However, certain judgments alter the Nijeb case have attempted to dilute even this minimum standard, by noting that even indefinite pre-trial incarceration may be grave and serious enough (of course, before a trial, one only has the police's word for the seriousness or gravity of accusations).

In this context, the Supreme Court's recent holding in Andhrabi is an important reaffirmation of the minimum standard. In that judgment, a two-judge bench of the Supreme Court reaffirmed that Nijeb stands for the proposition that a long delay in a trial triggers an independent, constitutional right to liberty.

While the exact length of time before this right can be defeated simply by repeating the



The Andhrabi judgment is consistent with constitutional principles and seeks to introduce humanity within the UAPA framework.

accusations against the individuals concerned.

In a rare move — perhaps signalling how uneasy some of the judges of the Court are with the deployment of the UAPA — the bench criticised recent decisions by other judges of the Court, such as the one denying bail to Umar Khalid and Sharjeel Inam in the "Delhi riots cases" for how, in effect, these judgments diluted the force of the constitutional guarantee.

The judgment in Andhrabi is consistent with constitutional principles, and seeks to introduce an element of humanity within the framework of the UAPA. Soon after, however, another bench of the Court referred this same question, to be resolved by a larger bench. One hopes that the Andhrabi court's recognition that indefinite pre-trial custody is an affront to constitutional

principles, will be upheld.

At the same time, it is important to reaffirm that this minimum standard does not transform the UAPA into an instrument of justice: The Andhrabi judgment is, in the end, a band-aid on a much deeper wound.

Justice requires a thorough interrogation of the basic framework of the UAPA, and of all laws that facilitate the jailing of individuals for long periods based on mere accusations alone. Until that happens, judgments like Andhrabi — although they are important in what they do, and must be defended — will remain necessary, but insufficient.

Gautam Bhatia, a Delhi-based advocate, is the author of Offend, Shout or Disturb: Free Speech Under the Indian Constitution. The views expressed are personal

Advertisement for Penny Wong, Foreign Minister of Australia. Text: 'We are four sovereign nations, have our own histories and interests, but there is great alignment... We all share a vision for the Indo-Pacific'. Includes a photo of Penny Wong.

Sustainable ways to meet the peak power demand

With day temperatures shooting past 42 degrees, power supply managers and consumers are anxious about interruptions in supply. As India develops, the use of air conditioners at places of work and in homes is becoming increasingly normal in urban areas.

Air conditioners are electricity guzzlers. The consequence of increased usage of ACs is that the growth rate of summer peak demand is high. It is higher than the growth rate of overall electricity demand.

How does a distribution company (discom) efficiently — and at the least cost — ensure reliable supply? Its first challenge is to increase the carrying capacity of its distribution network to deliver more electricity to run more air conditioners.

India has changed. Those who are using air conditioners would prefer to pay what it takes to get reliable supply rather than face disruptions and rely on diesel generators for back-up. Free, nearly free, or subsidised electricity for low-income households is the norm across the country.

Renewables have rightfully been given "must dispatch" status as there is no fuel cost and the generation is free. As thermal plants cannot bring their generation below a minimum level, solar generation has to be curtailed to maintain grid stability.

Storage of electricity is the solution. Storage technologies have matured and become cost effective. All forms of storage — battery, pump storage and concentrated solar thermal — need to be developed simultaneously and as fast as possible.

What would be the best way to create generating capacities that can be used only for a few months to meet seasonal demand peaks? One unorthodox idea would kill two birds with one stone. Buy the rice crop stubble of North India at a remunerative price and then give these to private entrepreneurs to convert these into briquettes/pellets in small dispersed locations near the purchase points.

Ajay Shankar is distinguished fellow, The Energy and Resources Institute (TERI), and author of Resilient India's Energy Transition. The views expressed are personal



Nitesh Gupta



Manish Sabharwal

baton is not passed. The first point of care for many patients is outside the public system, making private sector integration non-negotiable. Sigma remains TB's silent accomplice, delaying diagnosis and increasing adherence; private sector engagement must go beyond notification to include diagnosis, digital reporting, treatment adherence and accountability for outcomes.

Integration: Under-nutrition and anaemia are not comorbidities; they are facilitators of TB. Mental health is not peripheral; it determines adherence to treatment.

Nitesh Gupta is managing director, Lepin, and Manish Sabharwal is the author of Made in India. The views expressed are personal

# Heat, Certainly Not Part of Cool Viksit B

### It's hurting the economy on the ground

The economy is hotting up—and not in a good way. This summer, temperatures are already pushing towards 42°C (feel like 50°C) in north, west and central states. India Meteorological Department (IMD) has announced that there is little chance of immediate relief from the heatwave. A yellow alert was issued on Tuesday, and people have been advised to stay careful, avoid exposure to direct sunlight for longer periods, and remain hydrated. Weather forecasts suggest that the maximum temperature may remain around 44°C, while the minimum temperature could stay close to 30°C in the coming days. Super El Niño—exceptionally intense phase of the El Niño-Southern Oscillation (Enso) in which sea surface temperatures in the central and eastern Pacific Ocean surge by 2°C or more above normal levels—may make 2026 the hottest year yet. No matter what optimists say, we're in for a terrible time.

Extreme heat, high humidity and high night temperatures are becoming signatures of the Indian summer. It is no longer the season of mangoes, liches and watermelons. It has become a crisis with adverse health and productivity, and severe economic impacts yet to be properly measured that need immediate system-wide attention. Tackling heat is about thermal comfort. With more than 50% of the urban infra required by 2050 yet to be built, addressing the heat crisis requires passive cooling interventions ranging from design changes like bigger windows to construction practices like in-built roof insulation to using building materials that resist or delay heat flow. Interventions like district cooling can help. But that will require planning and investment. As will neighbourhood-scale interventions like increased tree canopy cover for shade and evaporative cooling.

Rising heat is already affecting productivity and economic growth. Gig workers 'out there' are reeling. More than 300 towns and cities have heat action plans. But these need to go from reactive to proactive. Someone should understand that extreme heat is a disaster. We need to prioritise and 'kill' it.



Today, that arbitrage has evaporated. The US federal funds rate sits at 3.5-3.75%. The 10-yr US treasury yields are over 4.5% and 30-yr is well over 5%. Long bond yields in markets across the world from Japan to Europe are at levels rarely seen in past two decades. In this environment for India to offer a special bond attractive enough to mobilise \$25-30 bn, it would need to be priced at US treasury plus 150-200 bps — implying a dollar coupon of 6% or higher.

### Why RBI should hike interest rate, instead of unleashing forex mobilisation schemes as in the past

# It Won't Help This Time



Ashish Gupta

RBI has historically possessed a remarkable 'Break glass in case of emergency' toolkit. In 1998, faced with post-Pokhran sanctions, it launched Resurgent India Bonds (RIBs) worth \$4.2 bn. In 2000, India Millennium Deposits (IMDs) brought in \$5.5 bn. And in 2013, during the 'tap tantrum', FCNR(B) swap window attracted over \$30 bn, single-handedly arresting a 1% rupee freefall.

Today, with rupee breaching 96 to dollar, oil above \$100 and CAD widening, whispers of a similar 'bazooka' are growing louder in policy circles. The temptation is understandable. But the global interest rate environment of 2026 has blunted this toolkit. Raising rates is no longer a policy option but a policy imperative.

Success of India's previous forex mobilisation schemes rested on one crucial foundation: a massive yield differential between India and the developed world. The 'carry' for RBI borrowing in dollars and depositing in India was enormous.

In 2013, when RBI offered banks a subsidised 3% swap rate on FCNR(B) deposits, US rates were effectively zero, enabling Indian banks to raise short-term dollar deposits at 2.3% and longer-term deposits at 3.4% rate. Banks were further incentivised through exemptions from CRR and SLR requirements, making the economics irresistible, and this 'leveraged carry trade' led to a 12% boost to forex reserves and rupee appreciating by 6% over the following 6 months.

### Chin, chin, here's to the rupee

While several reasons are currently appealing to attract and retain capital, in particular debt capital. While interest rates are currently appealing to attract and retain capital, in particular debt capital. While interest rates are currently appealing to attract and retain capital, in particular debt capital.



Chin, chin, here's to the rupee

Defending a currency solely through forex intervention is a Sisyphean task — you roll the stone up the hill by selling dollars, only for the market to push it back down while hoping oil prices fall and the Fed pivots — is a strategy of hope.

RBI's extraordinary bond schemes worked in a world of zero global rates and leveraged carry trades. That world is gone. In 2026, the only credible defence of rupee is the oldest tool in the central banker's kit: the interest rate. It's time to use it.

The writer is former CEO, Axis AMC

# Make Hay While H-IB Stutters

The US, poor scared thing, is tightening its immigration procedures. Foreign workers on non-immigrant H-1B work visas will need to return to their home country to apply for permanent residency or green card. Visiting Marco Rubio stressed that these reforms are universal measures, and no single country is being targeted. Sweet. Fact: Indians accounted for 70% of H-1B visas last year. So, yes, they're feeling the heat.

A green card is often sponsored by the employer with the applicant continuing to work at the company while waiting for change in status to take effect. Share of green cards per country is capped at 7% annually. Considering the larger pool of Indians applying for them, the wait is long. The new rule will disadvantage the Indian H-1B holder in the green card sponsorship pool. Not just lives disrupted but companies, too, will have to deal with disruption of losing valued highly skilled workers. For many companies, keeping an employee on the books without their work output will not be an option. While the US does a cost-benefit analysis of tightening immigration processes, other countries looking to expand their high-end industries can dip into this pool. Indian skilled workers should actively consider other countries with less disruptive transitions to permanent residency as their destination.

India should see this development in Trump's US as an opportunity. Stop looking like the gift horse in the mouth and focus, instead, on building a robust domestic industrial sector. Encourage US companies to set up Indian outposts to house Indian H-1B workers as they wait for the change of status to go through (or not). India should leverage the steady flow of trained workers to build companies in high-skill and hi-tech sectors.



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Why be cogent, when being totally incomprehensible helps?

# Obscurity, It Not Only Protects, But is Cool

The noblest aim in communication may well be incomprehension. To be understood is to be pinned down, catalogued, and filed away like a tax return. To remain opaque is to retain in mystery power and security. After all, consultants thrive not by clarity but by jargon. Politicians survive not by honesty but by ambiguity. The cult of clarity didn't really make it too far. Most folks are more besotted about pronunciation and other nonce optics/acoustics. This, obviously, is a remnant of hubbub. We're told to 'say what we mean' and 'mean what we say'. But meaning is so overrated. (Ask any political party spokesperson.) A speech everyone understands is a speech that everyone forgets. A memo that is clear is a memo that is disposable. The misunderstood, by contrast, linger in the imagination. Think of Kafka, whose sentences are long labyrinthine. Or central bankers, whose statements are so cryptic that they move markets precisely because no one knows what they mean except by the colour of their tie.

In a world drowning in TED Talks and 'explainers', the truly elite should aspire to bafflement. To be misunderstood is to be quoted, debated and misinterpreted endlessly. It is the secret of immortality. Clarity is mortal, obscurity divine. The next time you open your mouth, aim not for comprehension but for confusion. Trust us, you'll be remembered.

# 5G, Network Slicing, To No One's Disadvantage



Payal Malik, Maria Khan & Anulekha Nandi

Much of India's digitalisation rests heavily on the network architecture that supports it. Rapid digital transformation, and AI-heavy workloads contingent on 5G network deployment, have reignited debates on efficiency, management and net neutrality. Traditional mobile networks face an irreducible provisioning dilemma: the network was designed to serve heterogeneous traffic like consumer broadband, IoT sensors, enterprise applications and emergency communications, which had to be provisioned for peak demand of the most demanding use case. Network slicing converts this static over-provisioning problem into a dynamic allocation problem. The same physical resources can be reconfigured, in real time, to serve whichever workload is actually present.

5G functionality allows telcos to divide one physical network into multiple, independent virtual networks by using different 'slices' of the same spectrum band. Each slice is isolated, self-contained and secure, and can be independently configured to meet specific performance needs of different services or user groups. Operators would be able to charge different prices for the services. Characteristics of the slice such as latency requirements, throughput, level of security, degree of mobility and geographical reach. Users of slice would be able to reach new business segments benefiting from enhanced service customisation, greater scalability and improved network efficiency and security.

Network slicing also allows operators to charge premium pricing and increase per-user revenue. While it ensures that critical applications like autonomous vehicles and telemedicine surgeries can get uninterrupted service guarantees, projections indicate that it can increase average revenue per user (ARPU) by 30-40% from enterprises.

In any case, for such services, ability to carve guaranteed low-latency slices is technically necessary. These are cases where peak demand and shared bandwidth will do. International Telecommunication Union (ITU) and most 5G standardisation bodies treat slicing as a core 5G feature. But this creates a tension with net neutrality rules that by design mandate content- and application-agnostic non-discriminatory tariffs. This sits uneasily with the economic sustainability rationale for operators to recoup return on investments for their 5G infrastructure. Also, India's operators ostensibly face a spectrum crunch in the mid-band to high-band spectrum, especially in the mid-band to build genuinely high-capacity 5G networks at scale.

In a spectrum-abundant environment, an operator would simply expand capacity rather than monetise

scarcity through priority tiers. In a capacity-constrained environment, economics push toward selling priority on a desirably or unavoidably congested network.

When a telco sells 'priority' to consumers on a congested network, there is an implicit corollary: everyone not on the priority tier experiences worse service than they otherwise would. The network has 'become larger; the slice has just redistributed who gets the good part. Network slicing, while technically required and economically desirable, could impact basic internet users unlike other spectrum-sufficient jurisdictions where network neutrality rules and consistent operational efficiencies from slicing can exist parallelly.

Moreover, whether the network is truly spectrum-constrained or capacity-constrained (insufficient cell site density given subscriber growth) is analytically distinct. If congestion is avoidable through investment that operators are not making, then permitting priority tiers on the basis of that congestion is not solving a technical problem, it's allowing revenue from the problem to substitute for the incentive to solve it. Rent-seeking and not innovation, then, is the motivation. It isn't clear where the evildoers are.

India's market structure adds another dimension to the issue. With effectively two dominant operators, Jio and Airtel, the coordination risk that operators in concentrated markets have incentives to collude on quality tiers, is more plausible than in more competitive markets.

Network slicing for enterprise, industrial and genuinely specialised services has a defensible economic and economic rationale that doesn't threaten the open internet. Evidence for harm is weak in these contexts. But slicing deployed as a consumer retail priority tier on a congested or spectrum-constrained network rests on a much less certain foundation.

The mechanism by which it harms non-priority users is real. Incentive for operators to engineer, or tolerate, congestion is structurally present. India's market concentration amplifies both concerns.

None of that evidence has been placed on record.



Kazim Rizvi

When 5G services were launched in India in 2022, the technology carried a clear promise: faster speeds, lower latency and ability to connect millions of devices more seamlessly. Yet, for the average customer, the true value of 5G is not measured in peak speeds under ideal conditions, but in consistent, reliable performance in everyday, high-demand scenarios. Consider a typical morning commute. You may want to respond to work emails, or join an important call on the metro. Or think about making a quick UPI payment at a neighbourhood store. In each of these moments, expectation is simple: the network should work. However, as with any wireless system, signal strength can fluctuate, and in crowded environments, users may experience slowdowns or interruptions.

Delivering this seemingly simple experience is far more complex than it appears. Mobile networks operate on shared and finite resources. Key resources, particularly in dense urban areas where many users connect to the same cell site. During peak hours, congestion can occur, leading to slower speeds and service interruptions.

Network slicing allows a 5G network to allocate resources more dynamically across different use cases, such as lower latency, improved reliability or more stable connectivity. For customers, this can translate into a more predictable quality of experience, particularly in high-demand situations.

nes earlier this year has also not shown any impact, and ECB borrowings in March 2026 were down 50% y-o-y. Any moves to address tax issues, like withholding tax, will certainly be helpful. But in the current global rate environment, it's unlikely to materially turn the tide of capital flows. If India's own blue-chip corporates find global dollar markets unattractive, why would global investors find rupee-denominated assets attractive at current yields? The 'yield shield' that once protected our capital account has been thinned out.

With a widening CAD, accelerating currency depreciation and rising inflation (even though supply-led), a hike in rates is now a policy imperative rather than policy option. Defending a currency solely through forex intervention is a Sisyphean task — you roll the stone up the hill by selling dollars, only for the market to push it back down.

A rate hike is a much more potent defence. It increases the rupee's 'carry', making it expensive for international speculators to short the currency, bolster inflation-fighting credibility of RBI to global investors, and dampen non-essential import demand, easing pressure on CAD.

True, rate hikes will moderate the broader economic momentum and raise burden on MSMEs and home borrowers. But so will continued pressure on the currency. The alternative — burning through reserves while hoping oil prices fall and the Fed pivots — is a strategy of hope.

The writer is former CEO, Axis AMC

# THE SPEAKING TREE Conserve Your Energy

DADA J P VASWANI

We all have our biorhythm, which makes our energy levels fluctuate. Every individual has a different biorhythm, life and work demand that we show the same level of energy and efficiency to fulfil all our demands satisfactorily. Be in tune with the Rhythm of Nature. Be in tune with the rhythm of life. Today there are workshops and courses taught in almost every country on the science of biorhythm. The point is to be in tune with one's body and not to push it too far. This leads to stress and tension; and let me say to you, stress and tension are not only causes of disease but they are also life-threatening ailments. We eliminate worry and stress from our life, our life would be full of joy, health, harmony and peace. Significant are the words of the Upanishad, "The mind alone is the cause of man's bondage; the mind is also the instrument of man's liberation."

It is silence that can still the mind, so that the mind is calm and clear as the surface of a lake on a windless day. In silence, the mind will become a source of indescribable joy and peace, and tension and stress will vanish, as dew before the rising sun. To sit still in silence, you must be still. "The more a man does, the more he exists. And the more he is and exists, the less of God's end exists within him."

# PEAS IN A PODCAST

## Saxophone Colossus

With the passing of Saxophone Colossus Walter Theodore 'Sonny' Rollins at the tender age of 96 on Monday, the world has lost one of its key notes in jazz. Rollins was a man who has extraordinary music to fall back on — and his luminous portrait told in his own voice with warmth, candour and philosophical depth in this Broken Record podcast episode.

What makes this hour-long exchange with host Justin Richmond so compelling is the way Rollins frames his life lessons in discipline, solitude and resilience. He speaks of the sax not merely as an instrument but as a vessel for truth and self-discovery, a companion in his lifelong search for meaning. One of the most striking insights is his account of the legendary Williamsburg Bridge practice sessions, where he withdrew from the spotlight to spend hours refining his craft in solitude. He describes these sabbatical as pilgrimages, moments of retreat that allowed him to move beyond the stage. Equally powerful is his view of 'jazz as conversation' — improvisation as dialogue not only with fellow musicians but with the audience and the universe itself.

In this Jan 2025 podcast, Rollins chats about his encounters with Miles Davis, and the recording of his own iconic 1957 album, Saxophone Colossus. It is precious.

# Chat Room

## Talkin' 'Bout a Revolution

Appropos the Edit, 'Pep Talk for the Ages, Control, With Trust' (May '26), Pep Guardiola, who left Manchester City as one of the most illustrious managers of a global team, also meets all the key attributes of a legendary leader. He set objectives with careful clarity, set uncompromising standards demanding total intensity in training, and yet, won the trust of the team by humanising his leadership style as by trusting players' intuition. He has left a global legacy, not only as a tactician but as an influential generation of coaches and players. As a transformational leader, his leadership has completely transformed modern football with his tactical principles adopted by managers across all levels of football. He left City in a strong position to be succeeded already chosen, YG Chouksay, Pune

The writer is founding director, The Dialogue

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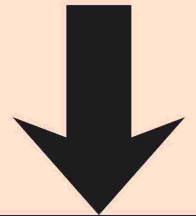
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### Editor's TAKE

## Pope Leo's AI warning is a wake-up call

Pope Leo XIV has issued his starkest warning yet: artificial intelligence, left unchecked in the hands of a powerful few, risks fragmenting humanity itself

There is something arresting about the world's most influential spiritual leader reaching back four millennia to a myth about bricks and hubris to make sense of the age of algorithms. Yet Pope Leo XIV's instinct is sound. In his encyclical *Magnifica Humanitas*, released on May 25, he warned humanity of a pivotal choice – "either to construct a new Tower of Babel or to build the city in which God and humanity dwell together." Strip away the theology, and what remains is a political and moral argument of urgent force. The Pope's central warning is that control of artificial intelligence must not remain in the hands of a few. This is not a niche religious concern; it is a diagnosis of a crisis already unfolding. A small constellation of American technology corporations – armed with vast capital, proprietary data, and lobbying influence – is effectively writing the rules of the most transformative technology in human history. Pope Leo criticised the immense power concentrated within a handful of private technology companies, and rightly so.

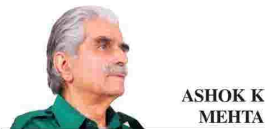
When the architects of a technology are also its regulators, something has gone badly wrong. The Babel metaphor is apt precisely because it captures the paradox of AI power. In the biblical narrative, Babel represents human hubris – humanity's attempt to reach the heavens through its own power, resulting ultimately in confusion and fragmentation. Today's AI ecosystem mirrors this dynamic: a dominant technological culture, monolithic in values and driven by profit, building upwards at immense speed while treating the human cost as an afterthought. Pope Leo warned that a singular, totalising technological culture risks becoming a new form of oppression.

For the United States, the encyclical arrives at an awkward moment. Last week, President Donald Trump delayed an executive order that would have created a voluntary process for testing AI models – retreating even from the mildest gesture towards oversight. Washington remains consumed by geopolitical competition: deploy AI faster than China, weaponise it sooner, regulate it later – if at all. Pope Leo's emphasis on human dignity and his opposition to autonomous weapons place him in direct contrast with techno-optimists who argue that the United States must militarise AI advances before its rivals do. The Pope does not oppose technological progress. Rather, he argues that calling for prudence – even for a slower pace in adopting AI – is not resistance to progress but an act of responsible care for humanity. That is a distinction that Washington, Brussels, and Beijing alike seem increasingly reluctant to acknowledge. Pope Leo has called for robust legal frameworks, independent oversight, informed users, and political systems that do not abdicate responsibility. These are not radical demands. They are the essential architecture of democratic accountability applied to a domain where accountability has been dangerously absent.

The Tower of Babel collapsed not because its builders lacked intelligence, but because they lacked wisdom. That is Pope Leo's warning. Whether world governments will heed it remains uncertain. History, as he reminds us, has seen this before – and it did not end well.

## India's strategic autonomy needs a reset

New Delhi's carefully cultivated policy of balancing competing powers is facing unprecedented stress. The larger question is whether India's current approach is adequate for a world where power politics is being rewritten in real time



ASHOK K MEHTA

Speaking on the anniversary of the nuclear tests conducted in defiance of US warnings, Prime Minister Narendra Modi said: "India will not bow down to anyone", heralding the successful execution of its strategic autonomy. This evolution has seen more downs than ups, especially during the turbulent Trumpian era. Punitive tariffs and multiple sanctions, along with waivers on Russian military platforms, Russian oil, and Chabahar Port, have taken their toll. During the recent BRICS Foreign Ministers' meeting in New Delhi, External Affairs Minister S Jaishankar criticised unilateral non-UN sanctions on India, calling them "unjustified", even as Delhi awaited answers on Chabahar and Russian oil. Later at the conference, he noted the unnecessary resort to unilateral coercive measures and sanctions, which are inconsistent with international law and the UN Charter. These measures "disproportionately affect developing countries". This is perhaps the first time such comments have been made – akin to closing the stable door after the horse has bolted. Strategic autonomy has been bruised notwithstanding the slew of deals with the EU and France. The purchase of 36 Rafale fighters in 2016, subsequent contracts for 18 naval versions, and the rejection of US, Russian, European, and Swedish offers were seen as a combination of high technology and, more importantly, trust. Trump's coercive tariffs and warnings over de-dollarisation in BRICS have made India compliant. But the narrative worsens. A US submarine sinking an Iranian naval ship, IRIS Dena, in the Indian Ocean after it returned from the Indian Fleet Review 2026 dented India's image as a net security provider. "Strategic" is perhaps the most overused adjective in the diplomatic lexicon. It is attached to "restraint", "patience", "sovereignty", and "national interest". The word "partnership" is variable, dynamic, and transactional. But "strategic autonomy" – hedging or balancing relationships through sovereign choices – has endured. It originates from non-alignment adopted after independence, when New Delhi punched far above its weight. With adversarial relations with the US intensifying, India was gradually pulled towards the Soviet Union. Confronted with simultaneous threats from Pakistan, China, and the US in 1971, India was compelled to sign the first formal Treaty of Peace and Friendship with the USSR. Then Prime Minister Indira Gandhi insisted that the phrase "India is a non-aligned country" be inserted into the treaty, although it functioned de facto as an alliance.



TO BECOME A VIKSIT BHARAT, INDIA MUST PLAY A MORE PROACTIVE ROLE AND TRULY AVOID BOWING TO ANYONE, AS MODI FREQUENTLY STATES. ITS CREDIBILITY AMONG THE GLOBAL SOUTH AND WITHIN ITS NEIGHBOURHOOD IS AT STAKE. STRATEGIC AUTONOMY IS INDEED IN NEED OF A RESET

The writer, a retired Major General, served as Commander, IPKF (South), Sri Lanka, and was a founder member of the Defence Planning Staff, now the Integrated Defence Staff

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displayed unusual restraint and respect towards Xi, praising his leadership extensively. The subsequent Xi-Putin summit was described as a meeting between "dear friends" in an "everlasting strategic partnership". In both cases, Xi conceded little to either Trump or Putin. These developments call for a reassessment of India's strategic autonomy.

At the recent Chennai conference, the majority opinion supported the establishment's approach, calling it "pragmatic". The opposing view argued that the government had deferred excessively to Trump, beginning with Modi's February 2025 visit. Regarding the two kinetic assaults on Iran, critics argued that India had effectively taken sides even before the conflict began. It appeared aligned with the US and Israel, particularly after Modi addressed the Knesset 48 hours before the Iranian Supreme Leader was assassinated in an Israeli precision strike. Apparently, both US and Indian intelligence agencies believed the conflict would end swiftly. Delhi remained silent, despite Modi's earlier repeated assertion that "this is not an era of war" and that only a political solution could resolve conflicts. India's attempt to balance strategic relations with the US, Russia, China, Israel, the EU, and Vietnam has resulted in too many competing priorities, with its relationship with Israel increasingly becoming a liability among Global South nations.

Some of India's recent diplomatic difficulties might have been avoided with more skillful handling of Trump's claim that the US facilitated the ceasefire during Operation Sindoer, which was not entirely untrue. Acknowledging this would not necessarily have undermined strategic autonomy. India's insistence that there was no third-party mediation appears difficult to sustain, given that in nearly every crisis since 1971 the US has played a role. Pakistan, meanwhile, managed its diplomacy skilfully, transforming its image from a state sponsor of terrorism into that of a responsible mediator in conflict resolution.

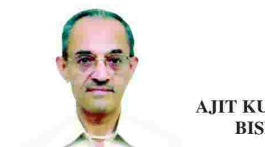
Pakistan can now claim to have helped facilitate the impending ceasefire between the US and Iran, in which Israel is conspicuously absent. Its international profile has consequently risen, and rather than being re-hyphenated with India, it now occupies a different diplomatic category.

At another seminar, Ambassador Jawed Ashraf remarked emphatically: "Silence is not strategic autonomy", hinting at India's silence regarding what many consider illegitimate actions by the US and Israel against Iran and others. To become a Viksit Bharat, India must play a more proactive role and truly avoid bowing to anyone, as Modi frequently states. Its credibility among the Global South and within its neighbourhood is at stake. Strategic autonomy is indeed in need of a reset.



A boy rides on a buffalo as others cool off in the River Tawi on a hot summer day in Jammu. PHOTO: PTI

## Ahankar: The greatest barrier between man and God



AJIT KUMAR BISHNOI

### 2ND OPINION

We should all be peaceful, 'sukhi' (happy), and satisfied. Unfortunately, we fail to achieve this dream state. Aren't we small, truly helpless, and largely ignorant? We are, but we do not accept this reality due to 'ahankar' (false ego). What is this 'ahankar'? It is a faculty given to us to realise that we exist and have a separate identity. In brief, ahankar means that I am; I exist. Unfortunately, we falsely believe that we are great because of whatever opulences we possess, such as wealth, power, etc. But these are temporary possessions earned through good karmaphalas (results of past pious deeds). They do not give peace, sukha, or satisfaction – what we constantly seek and miss.

It is time to seek an entity who can grant all these and is willing to accept us as well. As a matter of fact, God is willing to help all of us. His only condition is that we give



up ahankar and sincerely take His shelter. God then takes charge and begins to micromanage the life of the surrendered soul. This includes reformations, especially of 'svabhava' (nature), which is a person's worst enemy. Aren't we helplessly lustful and greedy? As improvements occur, God begins to empower the willing soul in a manner that suits the individual. For example, my Lord has empowered me to write spiritual texts.

With time, one becomes capable of accomplishing great tasks, just as Arjuna did in the Mahabharata war. Prior to that, Lord Krishna had assured Arjuna about the outcome of the war; Arjuna merely had to become a 'nimitta' (instru-

ment) of God, rise, and gain fame. (11.33) It was a foregone conclusion because God was the 'karta' (doer) in that case.

We also have Hanumanji's example of how one should act as a 'nimitta'. Upon his return from Lanka, having successfully accomplished his mission, Lord Ramachandra asked him, "How did you accomplish the stupendous task of burning Lanka, which was protected by Ravana?" Hanumanji replied, "O Raghunathji! It is all due to You; there is no greatness on my part." (Shri Ramcharitmanas, Sundarkanda 32) Hanumanji understood that it became possible only because of empowerment by his Lord. Unfortunately, we are not that wise; we try to take credit despite the warning given by Lord Krishna: "Whatever you do whatever you achieve whatever you strengthen you make; whatever you give in charity; whatever austerities you perform, do that as an offering to Me." (9.27)

We become puffed up with success, forgetting that everything was possible only through God's empowerment, as Hanumanji realised. This satisfies ahankar and distances us from God. Yet not everyone makes this mistake; some remain humble. Such souls are empowered by God to be peaceful, sukhi, and satisfied under God's protection. Gradually, they attain the dream state of 'jeevan mukta' (liberated while living in a material body). Many even qualify for liberation, which God is pleased to grant.

The writer is a spiritual teacher and a popular columnist

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### SYMBOLIC DIPLOMACY CANNOT REPLACE CONCRETE POLICY COMMITMENTS

Apropos "Repairing Bridges, Reaffirming Alliances" (26 May 2026), the high-profile diplomacy surrounding the visit of Marco Rubio appears more like a calculated exercise in damage control than a spontaneous expression of bilateral warmth. While a White House dinner invitation and visits to cultural landmarks create positive optics, they cannot instantly erase the trust deficit created by punitive tariffs and differing positions on regional security issues.

Washington clearly recognises the strategic importance of India as a major counterweight in the Indo-Pacific region. However, durable alliances are built on consistency and mutual respect rather than temporary diplomatic gestures. Symbolism alone cannot substitute for long-term strategic clarity and economic cooperation.

A pragmatic future requires

both nations to move beyond optics and confront economic and geopolitical realities honestly. For India, diversifying energy partnerships must remain guided by economic interest and national priorities, not merely by attempts to satisfy American strategic concerns.

If the United States genuinely wishes to strengthen ties with India, it must offer concrete commitments in trade, investment, defence technology transfer, and strategic cooperation instead of relying solely on goodwill diplomacy. Goodwill is ultimately a perishable commodity. Unless Washington treats New Delhi as an equal strategic partner rather than a transactional buffer in global rivalries, these repaired bridges may once again become vulnerable to future political storms

K CHIDANAND KUMAR | BENGALURU

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### Voice of social change

Writer Sivasankari being honoured with the Padma Shri has added dignity and stature to the award itself. Beginning her professional career in the 1970s as a Public Relations Officer at Citibank, Sivasankari transformed her pen into a powerful instrument of social awareness and reform. Over more than five decades, she has enriched Tamil literature through novels, short stories, essays, travelogues, and biographies. Her remarkable literary contribution includes 36 novels, 150 short stories, 15 travelogues, seven essay collections, and three biographies, including one on former Prime Minister Indira Gandhi. Her works have also been translated into several Indian and foreign languages, reflecting her universal appeal.

Tamil literature once enjoyed a discerning and committed readership. While writers such as Sujatha and Balakumaran dominated among male authors, Sivasankari and Indumathi emerged as powerful female voices shaping social consciousness through literature. What distinguished Sivasankari was not merely the volume of her work, but the depth of compassion and social concern reflected in it. Her celebrated novels, including *Ar Nakal*, courageously addressed alcoholism, women's struggles, family relationships, and changing social values, leaving a lasting impact on generations of readers.

AP THIRUVAIDI | CHENNAI

### Pride of Indian athletics

It is truly inspiring and a matter of immense pride for every Indian to witness Gurindervir Singh clocking 10.09 seconds in the 100-metre race and becoming the fastest Indian athlete. His achievement reflects the power of dedication, discipline, and self-belief.

What makes his success even more remarkable is the inspiring journey behind it. Despite being repeatedly told that Indians were not naturally suited for the 100-metre sprint, Gurindervir refused to accept such limitations and proved that determination can break stereotypes. His statement, "Indian genes are also strong," perfectly captures the confidence and spirit of today's youth. Equal credit must go to his parents and coaches, whose sacrifices, encouragement, and unwavering support played a crucial role in helping him achieve this milestone. Stories like these remind us that behind every successful sports person stands a family that dreams, struggles, and perseveres together. Gurindervir's achievement will undoubtedly motivate countless youngsters, particularly in Punjab, to pursue athletics with greater passion and confidence. His success is not merely a personal triumph but a moment of inspiration for the entire nation. India now eagerly awaits further glory from him at the forthcoming Commonwealth Games and Asian Games.

SANJAY CHOPRA | MOHALI

### Restoring trust in NEET

The Supreme Court's strong reprimand of the National Testing Agency over the NEET paper leak controversy is both timely and necessary. Following repeated failures in maintaining examination integrity and the subsequent cancellation of the highly competitive NEET-UG examination, the Court's intervention has become essential to ensure accountability and structural reform.

The Court expressed concern that the NTA failed to learn from previous controversies despite repeated warnings. Following the NEET-2024 irregularities, an expert committee headed by former ISRO chief K. Radhakrishnan submitted 10 recommendations to strengthen examination security and transparency, many of which were allegedly not implemented properly.

NEET-2024 witnessed allegations of paper leaks and an unprecedented number of top rankers, raising serious doubts about the credibility of the examination system. In 2025, the Central Bureau of Investigation reportedly arrested individuals attempting to manipulate NEET scores in exchange for huge sums of money. The latest paper leak controversy has further damaged public trust. Students and parents are demanding a transparent system. The Union Government must restore trust and protect merit.

P VICTOR SELVARAJ | TIRUNELVELI



## How India is building energy sovereignty, brick by brick

Energy sovereignty on large scale cannot be achieved overnight. It is built steadily through factories, infrastructure, and changing habits — brick by brick, factory by factory, citizen by citizen



**BHUPATIRAJU SRINIVASA VARMA**

Energy is the bedrock of modern economic life. For a country that imports nearly nine out of every ten barrels of the oil it consumes, securing it is not one policy question among others. It is the policy question of the century. India faces it more sharply than most: as the world's third-largest crude importer, with the largest two-wheeler base on the planet and a passenger vehicle market still in its early growth stage, how the country powers its mobility will shape household budgets, the rupee, and its strategic standing for decades.

The structural answer has, over the past decade, become clear and globally visible — the gradual transition of mobility from petrol and diesel to electric. The International Energy Agency notes that the world's electric vehicle stock displaced more than 1.3 million barrels of oil a day in 2024, and projects that figure to cross five million by 2030. India, under the leadership of Narendra Modi, has been positioning itself for this transition over the past decade.

At the centre of that effort sits PM E-DRIVE — the Prime Minister Electric Drive Revolution in Innovative Vehicle Enhancement scheme. Launched in October 2024 with an outlay of ₹10,900 crore and recently extended to March 2028, it supports 24.79 lakh electric two-wheelers, 3.16 lakh electric three-wheelers, 14,028 electric buses across nine cities, electric trucks and ambulances, and a nationwide charging backbone worth ₹2,000 crore. At a national conference in Bengaluru earlier this week, an additional 4,874 EV chargers across several states were approved.

The early returns are visible. India sold over 25.5 lakh electric vehicles in the last financial year — a 25 per cent year-on-year jump, taking the electric share to 8.64 per cent of all automobile sales. Penetration in the electric two-wheeler passenger segment has crossed 19 per cent.

The 16.72 lakh vehicles already supported by demand incentives are saving the country around ₹0.14 crore worth of fuel every day. Each vehicle, cumulatively, represents a barrel of crude no longer imported into the country.

PM E-DRIVE alone cannot deliver this transition. Consumer subsidy is merely the visible end of a much longer supply chain — batteries, magnets, components, and complete vehicles.

A connected set of schemes addresses that larger ecosystem. The Production-Linked Incentive for Automobiles and Auto Components (₹25,938 crore) anchors advanced automotive manufacturing. The PLI for Advanced Chemistry Cells (₹18,100 crore) is taking domestic battery production to gigawatt scale — historically the largest cost component in an imported EV.

The Scheme for Rare Earth Magnets (₹7,280 crore) addresses a supply chain in which global capacity is concentrated in very few hands, and upon which an Atmanirbhar Bharat in mobility cannot afford to remain dependent. The Scheme to Promote Manufacturing of Electric Passenger Cars in India, opened to global applicants in June 2025, brings world-leading EV manufacturers to India.

The government committed investment of ₹4,150 crore each. Behind these schemes lies employment for young Indian engineers, technicians, and ITI graduates.

Public transport carries the same logic at scale. Buses account for nearly 60 per cent of all passenger kilometres in India. Two schemes support their electrification: PM E-DRIVE's ₹4,391 crore allocation for 14,028 buses, and the PM e-Bus Sewa Payment Security Mechanism, with an outlay of ₹3,495.33 crore, supporting over 38,000 additional electric buses by guaranteeing operator payments when a State Transport Undertaking delays payment.

That single guarantee removes a financial obstacle that no subsidy alone could address. Bengaluru is set to receive 4,500 buses in the current phase, Hyderabad 2,000, Delhi 2,800, Ahmedabad 1,000, and Surat 600.



None of this work began because of the present international situation, but recent developments have made its value abundantly clear. Global oil markets have experienced significant volatility since late February, with disruptions around the Strait of Hormuz affecting major shipping routes. India imports 88 per cent of its crude oil and spent 174.9 billion dollars — 22 per cent of total imports — on crude and petroleum products in 2025-26. Several major Asian and European economies witnessed retail fuel prices rise by twenty to thirty per cent during this period. Prices at Indian petrol pumps, however, moved only marginally — the result of diversified sourcing, prudent fiscal management, and the resilience of our oil marketing companies.

### The Pioneer SINCE 1865

WHAT HAS BEEN SET IN MOTION UNDER THE PRIME MINISTER'S LEADERSHIP OVER THE PAST DECADE GIVES INDIA, TODAY, MORE OPTIONS THAN EVER BEFORE AT A TIME OF INTERNATIONAL ENERGY UNCERTAINTY. THE VISION OF VIKSIT BHARAT BY 2047 RESTS, IN PART, ON PRECISELY THIS WORK, WHICH WILL CONTINUE

The writer is the Minister of State for Heavy Industries and Steel

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The Pioneer

## It's time to get industrial trans fats out of our kitchens



**INDU BHUSHAN**

When India's Food Safety and Standards Authority of India (FSSAI) capped industrially produced trans fatty acids (ITFA) at 2 per cent of total fat in January 2022, we did something remarkable. We became the first lower-middle-income country in the world to bring a World Health Organization gold-standard trans fat elimination policy into effect — a measure that could potentially protect more than 1.4 billion people from its harmful effects. Leading the way among South Asian countries and ahead of many nations with higher GDP per capita, our country drew the line.

That was the easy part. More than four years later, the regulation exists at the national level, but operational enforcement remains uneven across the country, and in too many states it is still not being implemented. Trans fats — the chemically altered oils that clog arteries and kill silently — are still finding their way into our food. They may be present in samosas at roadside stalls, in the cream layers of biscuits, in the laddoos and jalebis sold at neighbourhood sweet shops, and in the puffs and patties at bakeries in our towns and cities. The law has been written, but it is not yet being lived. The gap is neither technical nor cultural — it is about enforcing the law where the problem actually begins.

This is the work that lies ahead. Trans fats are not, as is sometimes assumed, part of our diverse culinary heritage. Vegetable oil that became the workhorse of cheap commercial cooking in twentieth-century India — was a foreign invention introduced in the 1930s as an industrial substitute for ghee. It was sold to us as a modern, hygienic, and convenient product, but in reality it is equivalent to slow poison. Every gram of industrial trans fat consumed in India today is a gram of something our traditional kitchens never knew. What our great-grandmothers' kitchens did know was mustard oil pressed from seeds grown across the Gangetic plain; groundnut oil from the kolhus of Gujarat and Maharashtra; coconut oil (thi ka tel) pressed in the fields of Tamil Nadu and Andhra Pradesh; and ghee, made the slow way, from the milk of cows fed on real fodder. These are the fats India consumed for centuries. None of them contain the industrial trans fats estimated to have caused up to half a million premature deaths globally every year.



The death toll in India is staggering: an estimated 70,000 deaths annually due to trans fat consumption. Cardiovascular disease is now the leading killer in our country, striking Indians, on average, a full decade earlier than it strikes people in Western nations. India also bears one of the world's heaviest diabetes burdens — and a growing body of evidence now links industrial trans fat consumption not only to heart attacks but also to insulin resistance and type 2 diabetes. Every heart attack prevented, every case of diabetes averted, is a wage-earner saved, a family kept whole, and a hospital bed freed for someone else.

So, what must states now do? The answer is simpler than it first appears because the problem is concentrated. Industrially produced trans fats are made by a finite and known number of producers — the manufacturers of vanaspati, margarine, bakery and confectionery shortenings, and partially hydrogenated and inadequately reformulated fats that downstream bakers and halwais purchase. Solve the producer problem, and the downstream problem largely solves itself. First, identify the producers. Every state food safety department, working with FSSAI, can identify all manufacturers of vanaspati, bakery shortening, and hydrogenated fat operating within the state. This is not a search for needles in haystacks. These are, for the most part, licensed and registered industrial units. They can be listed, visited, sampled, and tested against the 2 per cent limit. Those not registered can readily be identified and brought into the system by tracing supply chains back from shops to suppliers and then to producers.

Second, inform the regulators and the regulators themselves. Implementation has been uneven partly because frontline officials responsible for enforcement have not always been adequately equipped to do so. State food safety officers need clear guidance on identifying and sampling regulated products, standardised laboratory protocols to measure TFA content, and the authority to act upon their findings. Many producers — especially smaller regional manufacturers — continue operating with outdated technology, formulations, and supply chains. State governments, working alongside the edible oil industry and technical institutes, can guide the transition towards compliant fat blends and, above all, towards the use of traditional Indian oils that are healthier and have formed the foundation of our cuisine for generations.

A producer who reformulates healthier alternatives using mustard, groundnut, sesame, and rice-bran oils or their blends is not merely complying with the law. He or she is creating a better product from crops cultivated by Indian farmers.

Third, take action against those unwilling to comply. Information and assistance are the carrot; the stick must also be real. Producers who, after being identified and offered a clear path forward, continue to market non-compliant trans-fat laden products are introducing toxins into our food supply and should face licence suspension, product seizure, and recall under the Food Safety and Standards Act. A handful of stringent and publicised actions will move the industry faster than a thousand inspections of small bakeries ever could. India set the standard for the world four years ago; it is now time to make India truly trans fat free. We know that we can, and when we do, we will not be importing some foreign idea of health. We will be returning to our own roots and moving towards an Ayushman Bharat.

The writer is President of I-FEAP at Public India Foundation and a former Indian bureaucrat. He was also the first CEO of Ayushman Bharat

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## India acquires capacity to operate a commercial-scale fast breeder nuclear reactor



**ANIL BHAT**

On April 6, 2026, India's 500 MWe (Megawatt electric) Prototype Fast Breeder Reactor (PFBR) at Kalpakkam, Tamil Nadu, reached "first criticality" — the initiation of a self-sustaining, minimum commitment chain reaction. This monumental achievement pushes India into the second stage of its pioneering three-stage nuclear energy programme and positions the country as a global leader in advanced breeder reactor technology.

Completed and commissioned in March 2024, the reactor successfully achieved first criticality just thirteen months later — the initiation of a sustained, self-sustaining nuclear chain reaction. Designed by the Indira Gandhi Centre for Atomic Research and built by BHAVINI, a Government of India enterprise established to construct and operate the country's advanced nuclear power reactors, the PFBR is central to Stage Two of India's Three-Stage Nuclear Power Programme. It is designed to use mixed oxide (MOX) fuel — plutonium and uranium — and produces more fissile material than it consumes, paving the way for the utilisation of India's vast thorium reserves.

India holds only about 1.2 per cent of global uranium reserves but possesses one of the world's largest thorium reserves, estimated at 25-

30 per cent of the global total. Thorium cannot be used directly as a nuclear fuel; it must first be irradiated in a reactor to convert it into the fissile isotope Uranium-233. To harness these reserves, the Department of Atomic Energy established an innovative closed-loop Three-Stage Nuclear Power Programme aimed at achieving long-term energy independence.

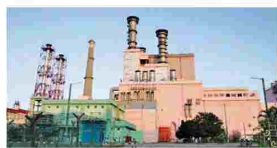
**Stage 1: Pressurised Heavy Water Reactors**  
Natural uranium is used as fuel to generate power. The spent fuel produces plutonium, which acts as the primary input for the next stage.

**Stage 2: Fast Breeder Reactors**  
The plutonium from Stage 1 is used to fuel reactors that generate more fissile material than they consume. These reactors are also used to irradiate thorium and convert it into Uranium-233.

**Stage 3: Thorium-Based Reactors**  
These reactors will use the Uranium-233 bred in Stage 2 to power the nation using the country's abundant coastal thorium reserves.

The PFBR at Kalpakkam, Tamil Nadu, marks a major milestone towards transitioning into the second and ultimately the third stages of this roadmap. India's Department of Atomic Energy designed a unique phased roadmap to bypass its limited domestic uranium reserves and unlock its massive coastal monazite sand deposits, found extensively in Kerala, Tamil Nadu, and Odisha.

Unlike conventional reactors that consume more fuel than they produce, the 500 MWe PFBR is a "breeder" reactor. Using a uranium-plutonium mixed oxide (MOX) fuel core, it is designed to transmute surrounding non-fissile uranium



This entirely indigenous innovation has been achieved after overcoming decades of complex engineering challenges and geopolitical technology denial regimes. The plant was completely designed by the Indira Gandhi Centre for Atomic Research and built by BHAVINI, validating India's culture of scientific self-reliance. India's ambition to sustain its power grid for up to 60,000 years relies on its vast world-leading thorium reserves, estimated to exceed 500,000 tonnes. Thorium-based nuclear reactors use a closed fuel cycle process that transforms this abundant element into fissile Uranium-233, creating a practically limitless energy source capable of achieving genuine national energy independence.

Power generated at the Kalpakkam nuclear complex is delivered across India through the National Grid. The delivery process operates as follows:

**(a) Generation and Step-Up:** The Madras Atomic Power Station (MAPS) and the PFBR generate electricity at medium voltages, around 15-33 kV. Generator Step-Up (GSU) transformers immedi-

ately boost this to extra-high voltages, such as 400 kV or 220 kV, to minimise energy loss over long distances.

**(b) Grid Interconnection:** The stepped-up power is fed into the Southern Regional Grid. It is integrated through switchyards at Kalpakkam into high-voltage direct current (HVDC) and high-voltage alternating current (HVAC) transmission lines.

**(c) National Transmission:** Using inter-state "power highways", electricity is transmitted across the country. The Power Grid Corporation of India manages this supply and demand dynamically. If regional power pools experience deficits, grid operators can reroute Kalpakkam's electricity to different states through the interconnected National Grid.

**(d) Distribution to Consumers:** When the electricity reaches its destination state, it passes through regional substations where the voltage is progressively stepped down through successive transformers, ultimately reducing it to low-voltage lines (415V/230V) to safely power homes and businesses across the nation.

By design and according to the laws of nuclear physics, the PFBR at Kalpakkam produces high-grade Plutonium-239, the primary fissile material used in nuclear weapons. A fast breeder reactor (FBR) uses a core of mixed uranium-plutonium fuel surrounded by a "blanket" of depleted Uranium-238. Fast neutrons generated in the core bombard this blanket, transmuting the uranium into Plutonium-239. While reactors inherently produce different grades of plutonium, the FBR's operating cycle can be manipulated to yield highly pure,

weapons-grade Plutonium-239 by removing the fuel and blanket rods before they become "over-exposed", which would otherwise create less desirable plutonium isotopes. India's three-stage nuclear programme is designed ultimately to harness the country's vast thorium reserves.

Because India maintains a civil-military separation in its nuclear programme — and is not a signatory to the Treaty on the Non-Proliferation of Nuclear Weapons (NPT) or the Operates outside the safeguards of the International Atomic Energy Agency. While the PFBR's stated primary objective is to produce clean baseload electricity and establish a closed fuel cycle for thorium utilisation, the facility also provides an industrial-scale capability that yields the precise materials required for nuclear weapons. While this is a historic milestone for long-term energy security, it will have no immediate effect on mitigating the current global energy crisis, as the reactor will require months of safety testing, grid integration, and commissioning before reaching full commercial power capacity.

The immediate impact is primarily symbolic and strategic: it makes India only the second country in the world, after Russia, to operate a commercial-scale fast breeder reactor, thereby demonstrating the country's technological capability to manage complex closed-loop nuclear fuel cycles.

The writer is a VSM (Retd.), a strategic affairs analyst and former spokesperson, Defence Ministry and Indian Army

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THE ASIAN AGE

27 MAY 2026

CBSE mess: Govt must search for root of graft

Prime Minister Narendra Modi often reminds his fellow citizens about the democratic dividend this country is set to harvest. Mr Modi is obviously referring to the fact that more than half of the Indian population is aged below 30, and a lion's share of it is made of students. However, the government he leads and the agencies under it do not treat the student community in a way that they are assured of a bright future, instead they are subjected to untold miseries for no fault of theirs. But those who are responsible do not appear to acknowledge them; leave alone make honest attempts to fix them.

The leak of the question papers for the National Eligibility-cum-Entrance Test (Net) for admission to various medical courses in the country conducted by the National Testing Agency (NTA) and the serious complaints about the valuation of papers for the Class 12 examination conducted by the Central Board of Secondary Examination are the result of unacceptable lapses on the part of the government.

The NTA has been conducting various national tests for admission to educational courses for about a decade and there have been several instances when the agency has proved itself to be unequal to the task. The cancellation of the Net examination for admission to undergraduate courses this year cannot be counted as a one off incident; it was only two years ago that such allegations had surfaced. It appears that the government did not take a thorough look into what went wrong and examined what corrective steps were to be taken.

The two issues that are now making students chase elusive solutions are of the government's own making. The education minister has never appeared serious about the purpose of his ministry...

It is a delayed decision, albeit a welcome one.

The two issues that are now making students chase elusive solutions are of the government's own making. A national level entrance test for medical admissions was mooted by the Sharma government after it came across irregularities in the tests state governments had been conducting. Now, the solution has become worse than the original problem. It is not that there are no national level entrance examinations in this country; it only shows that the NTA is not equipped to handle such a mammoth exercise. Its lethargy and callousness have forced the Supreme Court to point out that it has refused to learn from past mistakes and make amends. The CBSE revaluation issue is also the creation of an unprepared, unimaginative bureaucracy that did not have the wisdom to introduce a new system after ensuring that all the bugs are fixed.

The education minister has never appeared serious about the purpose of his ministry; it has completely lost the message the Prime Minister has been trying to communicate to the youth. Instead, it is busy searching for excuses to minimise its own failures. It must at least now run a thorough check of the system and see if corruption has taken root before things get out of hand.

Let people live closer to work

Finance minister Nirmala Sitharaman has aptly identified the three chronic stress points of the Indian economy — fuel, fertiliser and forex. These are collectively called the 3Fs. These 3Fs have repeatedly exposed the country's structural vulnerabilities, as it is heavily dependent on imports for fuel, fertiliser inputs and external trade stability.

Every major economic disruption in the last five decades has emanated from oil shocks and eventually circled back to these three pressure points. However, no government has taken steps to address these structural vulnerabilities for various reasons. One of the reasons could be the lack of alternative transport systems.

While introducing green energy vehicles and green fertiliser could lead to immense foreign exchange savings, the Central government should also look at another factor at the root of the problem — the distance between an employee's house and workplace.

To address this issue, the Centre in partnership with state governments must redevelop areas closer to work hubs in all major cities similar to the project being undertaken in Dhulevi, Mumbai.

The redevelopment should involve constructing large residential apartments as affordable rental housing complexes, built and maintained under a public-private partnership model. A similar model is followed in Singapore and Japan.

While this development may affect some property owners in those areas, it is imperative for the country's overall long-term sustainable development, which cannot be held hostage to the interests of some property owners or builders. If India wants to avoid another oil crisis, people and the government must discard old behaviours and adopt new ones.

THE ASIAN AGE

KUSHIK MITTAR

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Subhani



Old parties, new politics: The 'cockroach' upheaval



Shikha Mukerjee

With the power to shock and awe old parties into consciousness about their limitations, the arrival of the online Cockroach Janta Party with a clear agenda and more followers online than the biggest party in the world, namely the BJP, and India's own Grand Old Party, the Congress, that is, over 13.8 million followers on Instagram, overtook the BJP's numbers within five days of being born. The newest unregistered parties have identities and agendas; the BJP's identity is short, sweet and value-based; it is secular, socialist, democratic and lazy.

It has already caused an upheaval, albeit minor, but it has rattled the ruling establishment enough for complaints to be lodged that pushed X to shut down the original account. Like the invincible cockroach, the online party has reemerged with a cheeky handle: Cockroach is Back. In other words, actually Hindustani Party, are these the "messengers of youth", who committed themselves in his glorious Land of Cards (Tashir Deshi) dance drama to be impatient, restless and crazy, bent on breaking barriers and bindings; undisciplined, vehement and erratic?

Conventional thinking would caution patience about the BJP's future prospects. The point is the BJP is not a conventional party. For now, it says: "We are not BJP. We are not Congress. We are not AAP (for which founder Abhijeet Dipke had once worked). We are not anyone's B-team. C-team or volunteer cell. Anyone who tells you otherwise is selling you something."

This statement about its identity is a statement of purpose. It's also an indictment, a concise opinion poll on what is wrong with the political establishment.

The new party effectively slams the old parties for being transactional, of turning politics into the ultimate art of the deal by declaring: "Anyone who can blame young people for thinking that politics, pursued through an election process that they think (or at least 14 million followers think) is distorted by an institution, Election Commission, which is not trustworthy and a chief election commissioner who should be prosecuted under the fearsome UAPA, is not democratic? More Indians, wrongfully deleted from the voters' list by the EC, feel exactly the same.

And it stands for "political literacy and civic infrastructure for the young". That is perhaps the best articulation of the frustrations that generations of voters in India have felt about old political parties and their ways of slicing and dicing the electorate into segments: Hindu, Muslim, Dalit, Backward, Marginalised, Women, Unemployed, Youth, sanatani, Middle Class, Poor and other categorisations. What kind of political literacy is required or is missing is the big question.

If millions of possibly young people, subscribers/followers of the BJP, don't identify with the BJP, Congress and AAP, and prefer an online party that began life as a satire and a meme, as well as a reaction to the Chief Justice of India Suvya Kant's diatribe against

The newest unregistered parties have identities and agendas; the BJP's identity is short, sweet and value-based; it is secular, socialist, democratic and lazy

sections of youth, describing them as "cockroaches" and "parasites", it's perhaps the largest vote of no confidence in the old BJP political setup. It raises the question: have these millions ever voted in an election? If they have voted, how did they make their choices, since they believe themselves to be politically illiterate?

Should this minor upheaval sustain its "anti" position into the next round of elections due in 2027, when voters have to make up their minds in Uttar Pradesh, Gujarat, Punjab, Manipur, Uttarakhand, Himachal Pradesh and Goa, what impact will it have? Should it have an impact, then the probable coalition of the National Democratic Alliance and the crumbling edifice of the INDIA bloc may need to recalibrate the much-travelled tracks on which they have travelled.

And they have travelled: walking in buses on trains in modified vehicles resembling the chariots of ancient times, namely the Ram Rath, in air-rail, helicopters, cars, and once upon a time, famously on an elephant, as Indira Gandhi did on her comeback trail after 1977. The messages they delivered were always about "vikas", or development, be it in the "Sabka Saath", slogan, or "Garibi Hatao" or "Mera Bharat Mahan" or the "Amrit Kaal-Vishwa Gauri" slogan.

The BJP after its West Bengal triumph and reelection in Assam, is stronger than it was after its decline in popular support in the 2023 Lok Sabha polls, when it lost its single-party majority and the NDA coalition became its lifeline to the majority it

has now. The Congress and INDIA bloc are visibly more rickety than ever before; Mamata Banerjee lost her seat in Bhowanipore and the Trinamool Congress was defeated. M.K. Stalin lost his seat and the DMK was defeated. For the first time after the 1987 election, the Communists-Left are not in power in any state and their presence in the Lok Sabha has declined to less than 10 seats. Earlier, the Rashtriya Janta Dal was trounced in Bihar.

In eight months, the parties in Opposition to the BJP will face a survival test, because an even stronger BJP is certainly going to fight to finish off all its rivals, small or large. These parties have a choice: fight alone and against other INDIA bloc parties as well as the BJP as the TMC did, or they can do what the DMK did in partnership with other parties including the Congress. In both cases, the ruling parties lost.

Even if the BJP is a blip on the Indian political scene, it has become what the conventional parties in Opposition to the BJP have failed to do after the May state Assembly election: focus on the Election Commission's deletion of voters from the electoral rolls. It has also raised a question about voters being politically illiterate.

These are pointers to what the Opposition parties need to talk about instead of raging against the BJP and its destructive politics of identity and divisiveness. It is likely that after the May defeats in West Bengal and Tamil Nadu and the Congress-led United Democratic Front's win in Kerala, the opposition parties will fight shy of making the Special Intensive Revision of electoral rolls an issue in the next round of state elections that includes Uttar Pradesh and Gujarat.

The BJP after its West Bengal triumph and reelection in Assam, is stronger than it was after its decline in popular support in the 2023 Lok Sabha polls, when it lost its single-party majority and the NDA coalition became its lifeline to the majority it

LETTERS BUY RUSSIAN OIL

The continuous rise in petrol and diesel prices is a heavy burden for the common citizen. When fuel costs go up, everything from groceries to daily travel becomes more expensive, driving up overall inflation. Because our country relies so heavily on imported oil, we are constantly at the mercy of global conflicts and shifting international markets that disrupt supplies. While moving to green energy is the ultimate long-term solution, we need a practical fix right now. The government must protect consumers by spreading out our oil purchases across many different countries, rather than relying too much on any single unstable region. True financial relief and national progress can only happen when our energy supply is secure, steady, and smart.

K. Chidanand Kumar Bengaluru

SCRAP NICOBAR PROJECT

APROPOS "Dev 360/Furnace Economy: Crisis Of Heatwaves & Inflation" by Parulakha Chatterjee, summers are becoming hotter than parts of the Sahara, winters increasingly harsh, air pollution around Dwali reaches alarming levels, and catastrophic floods leave villages and cattle submerged. These are no longer isolated events but recurring signals of ecological distress. At such a moment, policy choices assume enormous significance. Large-scale projects like the Great Nicobar development and the diversion of compensatory afforestation land in Haryana for mining raise difficult questions about environmental priorities. Climate disruption is already fueling inflation, health burdens, displacement and economic insecurity. Sustainable planning can no longer remain secondary in the national developmental discourse.

Harsh Pawaria Rohtak

MARTA'S COURAGE

IT WAS HONESTLY amazing to learn about what Ukraine's 23-year-old tennis star, Marta Kostyuk, just accomplished. Even after receiving the devastating news that Russian missiles hit only 100 metres from her family home in Kyiv, Kostyuk never considered withdrawing from French Open, instead maintaining her focus and winning her first-round match. Kostyuk must be lauded for showing such incredible resilience.

Bal Govind Noida, UP



Chandrakant Lahariya

When couture is transformed into the loudest language of art

Isha Ambani once entered a space draped in a garment so intricately constructed and heavily embroidered with labour, imagination, and luxury that it briefly suspended the ordinary grammar of fashion. She was not just clothing; it felt like an event in itself. Some admired the craftsmanship, others noticed the price, but a few paused at a more uncomfortable question: what exactly are we witnessing when a dress stops being a dress and becomes spectacle?

That question returns every year in amplified form at gatherings like the Met Gala — the annual spectacle at the Metropolitan Museum of Art in New York where celebrities, designers, billionaires and cultural figures assemble in outfits that often resemble wearable architecture more than garments. It is presented as a celebration of art and fashion. Yet it increasingly appears to be something else — a shifting boundary where culture, commerce and visibility merge into one another.

In a world of artists, writers, curators and thinkers, one must ask: does such extravagance reflect art or does it simply reflect affluence dressed as art? Or does it quietly grant legitimacy to the rich to display their taste under the language of culture? Or should we accept all of this as necessary compromise, justified in the name of fund-raising for various institutions that depend on such patronage?

The Met Gala exists in this deliberate ambiguity. It raises funds for museums, supports exhibitions, and gives designers a global platform. At the same time,

however, it has become a theatre of escalation, where clothing is no longer about expression or identity alone, but about scale. Longer trains, heavier embellishments, and more complex silhouettes define its visual grammar. The question it raises is less about beauty and more about excess.

But this leads to a deeper question: is human dressing art at all? And if so, what does it reveal? Clothing has always carried meaning beyond utility. From tribal adornments to royal robes, from religious vestments to street fashion, the body has long served as a surface of cultural expression. Fashion is, in that sense, undeniably artistic — it holds composition, texture, symbolism and memory. Yet serious art does not rest at admiration. It demands reflection, sometimes discomfort. It slows perception rather than overwhelming it.

Here, a striking contrast emerges. Consider the work of Marina Abramovic, particularly her 2010 performance The Artist Is Present at the Museum of Modern Art in New York. For 736 hours, she sat silently across a table from visitors. There was no costume beyond simplicity, no spectacle beyond presence. The work relied entirely on attention and stillness.

People went in front of her. Some smiled. Others broke down without being able to explain why. Nothing "happened" in the usual sense, and yet something profound unfolded: the raw intensity of human presence, unmediated and unprotected. Placed beside this, the logic of the Met Gala appears

inverted. There, everything happens — lights, cameras, themes, elaborate garments — but human presence often becomes behind construction. The individual becomes a surface for design, and identity is fashioned into aesthetic performance.

This is not to oppose fashion and performance art, nor to rank one above the other. It is to recognise two different directions of art itself: one that expands into excess, ornament, and visual saturation, and another that contracts into silence, restraint, and presence. What, then, does extravagant dressing signify in our time?

Perhaps it reflects a society negotiating visibility as value. In an age of endless scrolling, to be seen is to exist. Clothing becomes a statement not just of taste, but of presence within a saturated visual economy. The body turns into a signal, compelling attention in an environment where attention itself is currency.

Yet there is a paradox. The more extreme the spectacle, the less we may actually perceive. When everything is heightened, meaning flattens into a image. A garment is no longer read slowly; it is consumed instantly and replaced by the next. Against this, Abramovic's silence refuses consumption. It demands time, discomfort, and participation. It suggests that art can also be subtraction, not only accumulation.

So, the real question is not whether clothing is art, but what kind of art we choose to value. Do we reward art that asks for attention, or art that offers

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So, the real question is not whether clothing is art, but what kind of art we choose to value. Do we reward art that asks for attention, or art that offers

spectacle? Do we prefer meaning that unfolds gradually, or impact that arrives instantly and fades just as quickly?

In the end, the Met Gala and Abramovic's empty chair are not opposites but reflections of the same cultural condition. One expresses the desire to be seen endlessly; the other reveals what it means to truly see.

Between these gestures lies the modern moment itself: a world where even beauty must compete for attention, and where silence has begun to feel like one of the most radical forms of art.

We seem to live in an age where everything is loud, immediate, and constantly on display. Subtlety is gradually being replaced by excess. Modern individuals and societies are increasingly encouraged to project, and exhibit versions of themselves for public consumption. There are reasons to be reflective, when every outfit becomes content, every appearance a statement, and everybody a surface for algorithms and attention, the line between self-expression and self-ensurance begins to blur. The deeper question, therefore, is no longer merely what we wear, but whether, beneath this spectacle, we still remain connected to ourselves and to what truly matters. Perhaps it is also time to reflect on how our understanding of art, beauty and identity is quietly changing as a society.

Dr Chandrakant Lahariya is a specialist in cardio-metabolic medicine and an art enthusiast

# INTERNATIONAL EDITORIALS



## The FT View



## FINANCIAL TIMES

"Without fear and without favour"

## The energy shock is not over yet

Even with a deal to reopen the Hormuz strait, supplies will take time to normalise

The US and Iran seemed to be making progress yesterday towards a deal that could reopen the Strait of Hormuz after three months of oil and gas flows being reduced to a trickle. Though stockpiles and other measures have partly offset the squeeze so far, JPMorgan had warned that, at current drawdown rates, without a deal commercial oil stocks could reach critically low levels by June. Yet even if the strait reopens, energy flows will take months to normalise, and governments will still face tricky trade-offs and the potential need to impose curbs on fuel demand.

Whenever it starts to reopen, resuming supplies through the strait is not a case of flicking a switch. With no export ability, many oilfields were fully "shut in"; S&P Global estimates that some

could take seven months to restart. Some resumed oil flows will have to go into rebuilding reserves. Some liquefied natural gas facilities, meanwhile, have been damaged and need repairing.

Roughly 2,000 ships stranded in the Gulf will need to reposition and offload cargoes. Sultan al-Jaber, CEO of the Abu Dhabi National Oil Company, has said it will take at least four months for traffic volumes through the strait to recover to 80 per cent of prewar levels, with full normalisation hard before the first half of 2027. Demining will take months.

Supplies of crude, LNG and many refined products could, then, remain tight until late in the year. What is the best approach for governments to conserve energy? The most efficient is, as far as practicable, to let market forces run their course. High fuel prices encourage consumers to use less energy and switch sources. In Europe, for example, electric vehicle sales surged to a record high in March. Politicians are under pressure, however, to

provide some cost of living support. The most common government responses so far have been price caps and cuts in energy taxes. Britain's chancellor Rachel Reeves last week scrapped a planned increase in fuel duty but was given short shrift by food retailers that she tried to cajole into "voluntary" price freezes on essential goods. Such policies risk making shortages more likely. Direct support to the most vulnerable is a wiser way to avoid drowning out price signals and straining public finances.

Either way, efforts are still needed to bear down on fuel demand. Awareness campaigns can help at the margin. Last month the Australian government launched a \$20m ad series urging drivers to empty their boots, pump up tyres and remove roof racks to use less fuel. Many Asian nations have already advised or mandated working from home to ease fuel usage in commuting, though this may not be appropriate for all sectors. Those who must commute can be incentivised to use public

High prices and initiatives to slash fuel use are not popular. But until flows normalise, the risk of shortages leaves governments with few painless options

transport and carpooling. Pakistan has reduced speed limits on motorways and national highways. Businesses can help by limiting air travel for work to ease pressure on jet fuel.

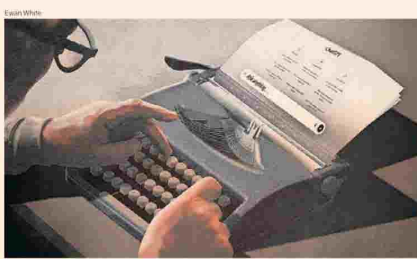
Since industry accounts for about a fifth of world oil demand, governments should encourage factories to shift, whenever they can, to the most available feedstocks, for instance to conserve liquefied petroleum gas for essential domestic uses. Argentina has tweaked rules to allow higher ethanol content in gasoline blends. Encouraging companies to shut non-essential processes and support to fix leaks can help too. Air conditioning is a drain on energy; Jordan has banned it in government offices.

High energy prices and initiatives to slash fuel use are not popular. But until supplies normalise, the risk of shortages leaves governments with few painless options. It is in many cases, after all, the price of failing to invest adequately in energy security and the green transition in the first place.

ft.com/opinion

## Opinion Technology

## AI stories aren't inevitably 'not art'



Stephen Bush

s *The Serpent in the Grove*, one of the five regional winners of this year's Commonwealth Short Story Prize, generated by AI? The story's author, Trinidadian writer Jamir Nazir, has a limited online presence and the work, some readers feel, bears the hallmarks of AI writing. The literary magazine *Granta*, which does not judge the prize but publishes all five winning entries, is reported to have submitted the short story to Anthropic's Claude.ai, which concurred, in the words of the magazine's publisher Sigrid Rausing, "that it was 'almost certainly not produced unaided by a human'". Nazir denies that the text was written by AI, questions the accuracy of so-called AI detectors, and writes that the story was inspired by memories from his childhood.

When reading the story, I found

Passing judgment is a task that we, as readers, should never outsource to anyone (or anything)

myself grappling with unwanted déjà vu. It did not remind me of when I ask ChatGPT to produce a polite bit of correspondence, or a firm complaint on my behalf. No, instead it reminded me of when, as a teenager, I discovered the detective novels of Dashiell Hammett and Raymond Chandler, and tried, badly, to emulate their tone in my own writing. Smart-talking characters might have had "a tongue that could make concrete cry", while a private detective (there was, of course, a detective) observed of a woman that "she spoke to the part of my family tree that rode horses out on the steppes of Eurasia". I was not a prodigy.

In Nazir's story, which is centred around a struggling farmer in Trinidad and Tobago, we are told a woman "moved quiet as if sound were taxed". Another has "the kind of walking that made benches become men". A third, and this is my favourite, is "big in the way of women who never apologise to furniture". I have to be honest, none of the women in my life have ever apologised to furniture, and as such I am uncertain what size of woman we are talking about here. The lowest point in the text, though, was surely the following sentence: "shame is a substance he felt on his skin. It itches. It doesn't rinse". A sentence that gave me an insight into what it must be like to

experience a stroke, if nothing else. Of course, it is true that generative AI often bears an uncanny resemblance to an obnoxious teenager wrongly convinced of their own writing ability. (Or, at least, to my work as an obnoxious teenager.) But as I read *The Serpent in the Grove*, my concern wasn't "did a human really write this?" but "did a human really judge this?"

Can a short story containing such nonsensical phrases really be the best entry this year from the whole of the Caribbean region? Unless the other entries were instruction manuals or full-length novels, I find that hard to understand, but having judged one or two literary prizes myself, I also know that all manner of strange tastes can be found on a judging panel.

My point here is that the question "is *The Serpent in the Grove* written by AI?" is a less important question than "do our human intelligences think it is any good or not?" Does it inspire joy or sorrow in the reader? (And I don't mean the type of joy or sorrow that comes with trying to imagine the precise girth of a woman who never shows contribution towards her garden chair.)

It's not that I don't care if my favourite authors are replaced by AI. What I enjoy about the work of Zadie Smith or Madeleine Thien isn't just that I find the writing beautiful, but that I get, however loosely, the sense of a living author whose work and focus is changing as they go through life. It's that the most important thing I am doing when reading is exercising my own judgment and my own imagination. *The Serpent in the Grove* is a failure because it made me laugh, and not with the intention of being humorous.

While I cannot imagine a more hellish way to attempt to create art than to sit at a computer finessing prompts and editing sentences piece by piece until eventually, a great novel emerges, I don't think that the final product of such a process is inevitably "not art". But passing judgment on whether it is art or not is a task that we, as readers, should never outsource to anyone (or anything).

There are lessons here that go beyond what we read. AI can already do many tasks for us. But the purpose of that ought to be to free up our time for more rewarding tasks, to sharpen our judgment, not to let it fall into disuse. We should be much more alarmed by the fact that *Granta's* publishers decided to use Claude to check whether the story was written using AI instead of using their own, human judgment, than by the idea that Claude might one day write a novel.

Making judgments is part of being human, whether that judgment is over an important ethical question, or trying to imagine what size person never apologises to furniture.

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## Letters

## How first past the post keeps Reform in check in Scotland

Our constitutional arrangements may be messy, but so are all the different voting systems ("UK government has the numbers to introduce PR", Letters, May 14). Up here in Scotland not one Reform Scottish member of parliament (SMP) was voted in under the first-past-the-post system, which holds SMPs accountable to defined constituencies.

In the proportional part of the election, Reform tied with Labour for second place and both have 17 SMPs.

These SMPs, although notionally tied to a region and constituency, are virtually invisible in reality. Most Scots could not tell you who theirs are. So there is no one to hold them to account.

So now, we have 17 MSPs wandering around the Scottish parliament, unaccountable to anyone but their party. Given the Reform leader's statements, and his party's performance in English council elections and seats, they are probably

on a mission to sabotage any sensible proposals rather than collaborate for the best outcome for everyone.

Our first past the post, party-based, messy system delivers a clear result, clear accountability, a head of state forbidden to be partisan, judges who are not elected, and a way of changing a leader.

Put that against the much-vaunted American system, which is failing the most basic principles of maintaining a democracy. Put it against the

proportional representation system in Israel, where the power of the religious minorities has encouraged genocide and supported a corrupt politician in place.

So be careful what you wish for. Sometimes a thousand years of tradition and argument about what's fair, however messy, may just have an edge on PR systems of electing governments.

Lesley Ellis  
Tarlant, Aberdeenshire, Scotland, UK

## Europe's banks not ready to monetise stablecoins

As European banks rally behind a single euro stablecoin project, it may be time to distinguish strategic ambition from operational readiness ("Euro stablecoin project attracts support from region's banks", Report, May 21).

Thirty-seven signatures confirm what most already know: banks want a role in the future of digital money. But joining a consortium is not the same as being ready to monetise stablecoins, support institutional adoption or deliver settlement at scale.

While the appetite is there, for most the capability isn't. Stablecoins require clean, structured, real-time data to move across payment rails smoothly. But much of that infrastructure was built for a slower time.

There is no guarantee banks can integrate with a stablecoin rail like Qivalis. Without modernisation, banks risk adding another digital layer on top of already complex operations.

That could mean higher reconciliation costs, slower integration and weaker returns on investment. These are not back-office issues.



They are barriers to growth. Europe's stablecoin ambition is welcome. But the commercial winners will not simply be the banks that sign up the pipes. They'll be ones that modernise the pipes beneath it.

Nick Fernando  
Co-founder and Director, Aqua Global  
London SM16, UK

## England's careers guidance experts await the call-up

Your report, which online carried the headline "Too many young people pushed towards university, says UK government adviser" (May 18), will surprise no one with experience of England's careers guidance system – or what remains of it. The more pertinent question is: how did we get here?

The answer lies, in no small part, with the previous Conservative government's systematic dismantling of a professional careers guidance infrastructure built over decades.

The defunding of Comexions (a UK governmental information, advice, guidance and support service for young people aged 13 to 19), the removal of funding for qualified careers advisers from schools, and the expectation that impartial guidance could be delivered by institutions with a vested interest in their own destination outcomes, created the conditions for exactly this kind of systemic distortion.

Teachers are skilled professionals, but it is neither fair nor realistic to expect them to carry expert knowledge of the full range of post-16 and post-18 transitions – eg apprenticeships, A-, T-

and V-levels, higher technical qualifications, labour market intelligence – alongside their primary responsibilities. That is precisely the role of trained, independent careers professionals.

The current government is right to name the problem. But diagnosis alone changes nothing. The evidence base, the frameworks and the professional expertise to address this are already available.

What is needed now is genuine engagement with those who have spent careers developing solutions – not another round of reinventing the wheel.

Deirdre Hughes  
Associate Professor, Institute for Employment Research, University of Warwick; Executive Director, CareerChat UK Ltd and Vice-President, International Association of Vocational and Educational Guidance (IAEVG), North Shields, Tyne and Wear, UK

## Clarification

● Raghuram Rajan, who was quoted in the obituary of Edmund Phelps, is a former chief economist at the IMF.

## OUTLOOK AMERICA

## Counting the cost of New York's sky-high food bills



by Siona Jenkins

Hunts Point is an unlikely place for a political experiment. The South Bronx neighbourhood is an unimpressive mix of residential streets and warehouses bordered by the East and Bronx rivers and is the site of America's largest wholesale food market.

But New York's first publicly owned food shop will open here next year, making good on one of mayor Zohran Mamdani's most controversial campaign pledges: for five municipal grocery stores to help reduce prices in the notoriously expensive city.

"Our administration is putting communities like Hunts Point at the centre of our work to address the affordability crisis," said Mamdani last week, announcing that a 20,000 square foot shop would open in 2027 in an affordable housing development in the neighbourhood.

Mamdani has said the stores will be subsidised by the city and offer staple goods at a reduced price but will be run by a private vendor obliged to pay workers union wages. New Yorkers are waiting to see whether they will help bring down the eye-wateringly high cost of food.

"New York has always been expensive," says Errol Schweizer, a retail merchandising consultant who grew up in the city. This is partly because space constraints mean food is sold in independent stores and family-owned grocers who "don't have the supply chain leverage and buying power of mass-market chains", he adds.

In recent years, though, prices have soared, increasing by 56 per cent since 2012, and it's been particularly expensive since the pandemic. Some 17.5 per cent of residents – that's 1.5m people – are now considered food insecure, meaning they lack reliable access to nutritious, affordable food.

In the depths of the winter, when New Yorkers can often be found queuing up for the latest designer clothes drop or Instagram-friendly restaurant opening, they braved sub-zero temperatures for a pop-up store on Seventh Avenue with free groceries.

The giveaway was offered by prediction platform Polymarket, which is hoping to win over the American public. It seemed to work. "You're truly a god-sent angel, I swear," said a woman filmed by Polymarket as she waited in the snow for her turn with the free food. Not to be outdone, rival betting company Kalshi staged a \$50 grocery giveaway in the East Village, telling local media that it "believed in free markets".

Mamdani made his controversial pledge to open city-owned stores during the cost of living campaign that won him a surprise mayoral election victory last year. A spokesperson for his opponent, Andrew Cuomo, described it as a "hare-brained proposal to bring Soviet-style grocery stores" to the city. But the mayor doubled down. To mark his 100th day in office, he announced another branch would be opened at

La Marqueta in East Harlem in 2029.

The city has owned markets for decades, operating the infrastructure and leasing space to vendors. But Mamdani's proposal takes it further – it's particularly important for overall affordability in the city, says Nevin Cohen, director of the CUNY Urban Food Policy Institute. "It's not just the price of food on the shelf in the supermarket, but it's how much people have to spend on food in relation to all the other high costs of living."

Cohen believes physical stores are just one way of reducing grocery costs. He points to another city-run pilot programme called "groceries to go" that provides credit on an e-commerce site for households belonging to New York's health and hospital insurance programme.

"Eventually there could be multiple types of public grocery programmes," he says. "Some brick-and-mortar shops, some online, some food markets – like traditional markets where the city owns and operates the infrastructure but leases the spaces to small vendors."

Details of how these might operate remain elusive and there are concerns that the plan lacks the scale needed to secure low prices. "Five stores across a city as large as New York is not a grocery chain," says Schweizer. "I think this is the administration that will finally figure out how to get it done. But it's not going to be easy."

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# Opinion

## The predatory advance of surveillance pricing

### Zephyr Teachout

Fourteen years ago, my then colleague Lina Khan came back from a retail trade association meeting with a story about a new phenomenon. Sellers, she said, were talking excitedly about the possibility of giving shoppers real-time coupons based on their behaviour. These retailers imagined a world in which someone who stood in front of a pair of shoes would receive an instant discount offer on their phone.

What started as an idea for discounts is now suspected of showing up across the online world as variable individual prices.

Think of a 76-year-old who is buying printer cartridges. They may be quoted a price that is higher than their younger neighbour simply because data suggests that they never comparison shop. That young neighbour could face their own

price penalty if data shows that their credit score sits in the wrong quartile. If you want to feel real outrage, consider that an algorithm might charge more for nappies after a customer buys children's cough syrup on the basis that parents of sick children are less price sensitive than those of healthy ones.

I coined the terms "surveillance wages" and "surveillance prices" in 2022 as a way to describe the strategy of an employer or seller using personally identifiable online information to set wages or prices.

For economists trained to see price as an information mechanism, surveillance pricing represents a kind of holy grail — each transaction perfectly representing preference.

But from a consumer's point of view each transaction is extracting the maximum possible surplus. When my colleagues and I first tried to describe this idea we called it "personal pricing". The problem is that this sounded too appealing, conjuring up the bespoke service of the ultra-wealthy, extended democratically to everyone. The reality is that it is not a personalised service but a way to

employ the same data infrastructure that social media uses to sequence feeds, only here the information doesn't determine what someone sees but what they pay or are paid.

It is almost impossible to know exactly where the strategy is being employed. When different prices show up for different people, companies tend to claim it is not the work of surveillance

**Credit scores, GPS patterns, and even keystroke dynamics could determine what a consumer pays**

pricing. Amazon and Delta, for example, have attributed price variation to market dynamics, third-party sellers or A/B testing. When a study on significant price differences on Instacart was published last year, Instacart said they were the result of randomised price testing.

Such denials are about to face further scrutiny. A few weeks ago, a JetBlue customer complained on X that when look-

ing at flights to travel for a funeral, the price kept rising. JetBlue customer service replied, suggesting the customer clear their cache and try again. Clearing the browser cache deletes local tracking data, implying that the higher price may have been tied to data collected from previous browsing sessions. The company's post was then deleted. A class-action lawsuit followed. JetBlue has said that its fares are not determined by cached data or other personal information.

There have been efforts at regulation. Europe and the UK have launched investigations. In 2024, Khan, who went on to become chair of the Federal Trade Commission, launched an investigation into how companies were using AI to base pricing on consumer behaviour. Last year, New York passed a law requiring disclosure of surveillance prices, and this month, the Colorado legislature passed a bill banning both surveillance pricing and surveillance wages. The law includes carve-outs for loyalty discounts but requires that they be available to all customers on identical terms.

This legal and political pressure is

arriving just as the technology has reached a critical capacity. Improvements in algorithmic capacity and consumer databases could enable a pricing revolution.

In the past, companies had to base prices on some combination of cost-plus, demand-based and competitor-based modelling. Now, they can incorporate a wide range of psychological, dynamic and experimental pricing. The data sets involved might include credit scores, GPS patterns, search duration, individual purchase histories and even keystroke dynamics that correlate with different emotional states.

This raises a fundamental question about whether markets premised on individualised information asymmetry — secret prices — are public markets at all.

The legal tests are just beginning in the courts. More states and countries should follow Colorado's lead. It will be easier to ban surveillance pricing before it becomes widespread than afterwards.

*The writer is a professor at Fordham School of Law*

## A 19th-century guide to running an effective meeting

### Guru Madhavan

One hundred and fifty years ago, when Silicon Valley was still mostly orchards, no one imagined algorithms brokering agree-

ments. Developers claim that AI mediators, like Google DeepMind's Habermas Machine, can help groups reach a consensus, yet a 19th-century engineer devised a process that still governs many of the meetings that matter most.

In 1865, as the civil war raged across America, a church meeting in New Bedford, Massachusetts, opened with prayer and collapsed into chaos. Henry Martyn Robert, a 25-year-old Union army officer, had been nominated to preside. Motions and tempers flew. By nightfall, Robert had lost control of the group. He vowed never to chair another meeting until he had learnt how.

That humiliation seeded one of the most influential documents in American civic life: *Robert's Rules of Order*. First published in 1876, 15 years after that disastrous meeting, the manual has been adopted by churches, unions, boards, professional societies and neighbourhood associations who want orderly proceedings. Even in Britain, where parliament follows Thomas Erskine May's treatise on proceedings, there are groups that rely on Robert's rules.

The son of a Baptist minister who opposed slavery, Robert grew up in a home riven by disagreements. While he joined the Union army, commissioned in the Corps of Engineers, some of his relatives fought for the Confederacy.

Robert saw fractures everywhere he went. Without formal rules in place, the

**How do you design something to survive a room of people certain they are right?**

loudest voice seemed to prevail during disputes. While railroads and telegraphs stitched the nation together, disagreements pulled it apart.

Robert approached the idea of improving meeting procedure and brokering agreements with the same rigour that he brought to the construction of harbours and lighthouses. He anchored it to the will of the assembly, then built an order of precedence to facilitate group work and curb amendments, with a two-thirds vote required to limit debate or override the minority.

Behind the mechanics lay a moral and social contract. When a group met, the majority owed the minority a full hearing — the right to debate, amend and appeal. Once a decision was reached, the minority then owed the majority its acceptance, unless it could later rally support to reconsider.

These rules might not guarantee wisdom or justice, but they offered stability: a framework that allowed disagreement to unfold without shattering the group. That balance of protected rights and legitimate outcomes sets deliberative procedure apart from majority rule or manufactured consensus.

The rules became so popular that they now function as a default operating system for meetings.

In smaller settings, of course, such procedures can feel like overkill. That's the vulnerability of any trusted system: procedure can be captured by those who know it best. The introduction of new technology doesn't fix this; in some ways, AI mediators risk deepening it by adding an invisible, uncontested layer that reshapes collective judgment.

Robert's own instinct was to design for the worst, not hope for the best. The man who once lost control of a church spent his later life building another kind of defence. After a hurricane flattened Galveston, Texas, in 1900, Robert helped raise the city on sand and build a seawall. When a comparable storm struck in 1915, the damage was far less.

The *Rules of Order* and the Galveston seawall answered the same question: how do you design something to survive the next tempest, whether a storm or a room of people certain they are right? Robert's *Rules* does not eliminate conflict. It calls it to order. It demands we argue in the open, under shared procedures, rather than outsourcing our disagreements to tools that deliver comfort at the expense of clarity.

*The writer is a systems engineer and author of "Wicked Problems: How to Engineer a Better World"*

## Iran is beating Trump at the art of the deal

### GLOBAL AFFAIRS

### Gideon Rachman



The worst thing you can possibly do in a deal is seem desperate to make it. That makes the other guy smell blood, and then you're dead. The best thing you can do is deal from strength, and leverage is the biggest strength you can have.

That was the principle Donald Trump (or his ghostwriter) set out in *The Art of the Deal*, published in 1987. Perhaps Trump should have re-read his own book before posting on April 5: "Open the Fuckin' Strait, you crazy bastards, or you'll be living in Hell."

To the untrained eye, that demand sounded just a touch desperate — particularly when Trump failed to follow through on his threats to unleash hellish violence on Iran.

The grim reality is that, in the talks to end the war, it is Tehran that has had the leverage. Iran's closure of the Strait of Hormuz put intense pressure on the global economy. As petrol prices have risen in America, so Trump's opinion poll ratings have plummeted.

The result is that, at the time of writing, the US seemed poised to agree to a deal that — over the long term — threatens to leave Iran in a stronger

position than before this war began.

The essence of the emerging deal is that Iran agrees to open the strait without charging a toll. In return, it gets phased relief from sanctions, including the unfreezing of billions of dollars of assets. Iran will make promises to restrict its nuclear programme. But the details will be the subject of future talks, so that issue is essentially unresolved.

Trump has insisted he is in no hurry and would not accept a bad agreement. But the reaction of hawkish Republicans to the emerging deal was telling.

Senator Ted Cruz said it could be a "disastrous mistake" because it would leave Iran "able to enrich uranium and develop nuclear weapons, and having effective control over the Strait of Hormuz". Senator Roger Wicker, head of the Senate armed services committee, warned that the emerging deal "would not be worth the paper it is written on".

The Israeli government, which played a crucial role in persuading Trump to go to war, will be polite about any deal in public — not least because Benjamin Netanyahu must soon face the electorate. But the reality is that the Israeli leader sold the war as a unique opportunity to secure regime change in Iran.

He is now looking at the conflict ending with the Iranian regime still in place — more confident, more headline and with new financial resources to rebuild its nuclear programme and its proxy network throughout the Middle East.

Eli Groner, a former director-general of Netanyahu's office, argues that the knowledge that Iran can now close the



Strait of Hormuz at any point in the future "is a victory far deeper and more strategic than any point-scoring military achievement". His one-word summary was: "Disaster."

As well as potentially alleviating the Islamic republic's dire financial and economic position, the agreement is likely to tilt the regional balance of power in Iran's direction.

As Dan Shapiro, a former US ambassador to Israel, observed on X: "Iran has gained significant leverage for the future by demonstrating it can control the strait, by attacking its neighbours and US bases in the region and causing significant damage, and by taking the United States' and Israel's best punch and sending it."

Shapiro believes that, nonetheless,

**There is a grim reality that, in the talks to end the war, it is Tehran that has had the leverage**

Trump is so boxed in that accepting a bad deal that opens the strait would be a better option than continuing the war. Given the mounting risks of a global energy crunch and a worldwide recession, that is an understandable calculation. America also has recent memories of wars — including Vietnam and Afghanistan — that went on for far too long, as the US struggled in vain to improve a losing position.

If and when Trump accepts a bad deal, it will be because he has no viable alternative. Senator Wicker's proposal was "to allow America's skilled armed forces to finish the destruction of Iran's conventional military capabilities and then reopen the strait".

But an effort to secure the strait by military means would probably have required the deployment of ground troops and the acceptance of heavy American casualties. Even then, the Iranians would have been able to threaten shipping with drones or missiles.

Trump's occasional threats to unleash "Hell" on the Iranian regime lacked credibility — because of his obvious

reluctance to get involved in a ground war and because of the danger of Iranian retaliation against the Gulf states and their energy infrastructure. In the jargon of military analysts the vulnerability of the Gulf gave Iran "escalation dominance".

The US president — who compares himself obsessively with former president Barack Obama — liked to deride the nuclear deal that the Obama administration reached with Iran in 2015. Trump has called it "one of the worst and most one-sided transactions the United States has ever entered into" and claimed: "Never, ever, ever in my life have I seen any transaction so incompetently negotiated as our deal with Iran."

But Trump himself is now negotiating an agreement that looks, in many respects, worse than the one Obama negotiated — partly because of the lurking knowledge that Iran can still close the Strait of Hormuz, any time it wants. That is some achievement from the master of the art of the deal.

*gideon.rachman@ft.com*

## Three ways a new Labour leader could change the politics of growth

### Jonathan Portes

Who's afraid of Andy Burnham? Not just Sir Keir Starmer. Some investors in UK government debt worry that a Labour leadership contest would push the party leftward — that Burnham would abandon Rachel Reeves' fiscal caution, borrow more and test the limits of market confidence. Cue attacks both on socialist irresponsibility and the malign power of the "bond vigilantes".

Responsibility. Still less is it an argument for the failed austerity policies of the early 2010s. It is because the UK's macroeconomic position, with a persistent current budget deficit, inflation rising and pressure on the Bank of England to raise interest rates, means a significant loosening of policy would result in a sharp rise in long-term interest rates.

The UK should continue to borrow to invest where investment raises future growth: housing, transport, energy infrastructure, schools, hospitals and research. Cutting capital spending to satisfy a short-term fiscal target would be folly. But borrowing more for current spending would not solve the country's underlying problems: weak growth, an inadequate tax base, overstretched public services and demographic pressures. It would simply increase the sensitivity of the public finances to gilt yields.

Nor would it work politically. A new prime minister would inherit a divided parliamentary party, a sceptical electorate and a fragile economic environment. If their first move were to loosen fiscal policy without a robust plan, the result would be a loss of economic credibility

and political authority then a chaotic retreat. If they ignored the fiscal arithmetic, the outcome would be disastrous: higher borrowing costs, weaker confidence, a rapid political backlash and probably a harsher correction later.

But that emphatically does not mean that policy is in a straitjacket, without scope for policies that are more radical,

**Policy is emphatically not in a straitjacket — there is scope to be more radical and progressive**

progressive and pro-growth: on immigration, Europe and tax in particular.

An ageing economy with rising demands on health, social care and pensions needs workers. It also needs students, researchers, builders, carers, nurses, engineers and entrepreneurs. Cutting migration, which Starmer bizarrely claimed as a policy success last week, may be politically popular in the abstract, but it reduces labour supply,

hits universities and care providers, worsens shortages and weakens growth. And it damages the fiscal position. Migration has costs as well as benefits, and distributional consequences as well as broader social ones. But a serious economic strategy cannot ignore the large fiscal costs of lower immigration.

A closer economic relationship with Europe would be a growth policy. Reducing trade frictions, improving mobility for young people and professionals, restoring participation where it makes economic sense and aligning regulations where divergence has no serious domestic benefit would support productivity and investment.

The tax agenda is clear and reflects a consensus among economists — not a wealth tax, at best a lengthy undertaking to raise relatively small amounts of money, but a much broader agenda. Reform housing taxation. Stamp duty is inefficient and council tax is indefensible. Shift the burden from national insurance and towards income tax, including a fairer treatment of unearned income, as Burnham's potential rival Wes Streeting has proposed.

Fix the marginal tax rates for middle and upper-middle earners. This would raise revenue, improve incentives and make the system more just.

A new leader would need to change the politics of growth. Yes, more open policies on migration and Europe and a fairer tax system would be economically "left" of the present government. But they would improve the public finances and reduce the deficit. Of course there are political risks. If presented simply as expedients to fill a hole in an OBR forecast, they will fail. But as part of a coherent settlement — better services, higher investment, fairer taxes and stronger growth — they may at least be arguable.

The gilt market should worry less about the next prime minister's label and more about the credibility of the programme. "Leftwing" does not have to mean fiscally loose. Done properly, it could mean confronting the policies that have made Britain poorer, smaller and harder to govern.

*The writer is professor of economics and public policy at King's College London*

## Opinion

The New York Times

## Iran Is Trolling Us, and We're Not Doing Anything About It

Jessica Brandt

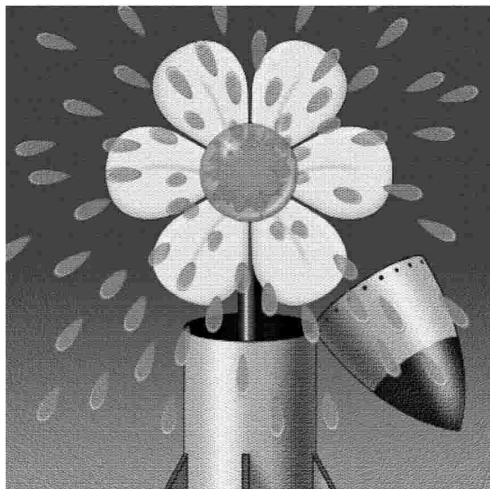
A senior fellow for technology and national security at the Council on Foreign Relations.

PERHAPS you've seen the viral video, a satire rendered in Lego: President Trump launches missiles at Iranian power grids, then sweats through a nightmare and ends up rocking alone on the floor, crying, white surrender flag behind him, cease-fire papers at his feet. Through his tears, he eats a taco — a nod to the acronym for the phrase “Trump always chickens out.”

Since the Iran war began, Iranian officials and pro-Iran influencers have used A.I.-generated content like this — clever, highly shareable, fluent in pop culture references (Lego, Marvel, Forrest Gump) — to ridicule the United States or present Iran sympathetically.

The strategy has been effective in its reach. In the first 50 days of the conflict, official Iranian accounts on X earned roughly 900 million views and 22 million likes — more than 30 times their previous 50-day totals for likes, according to a recent analysis. During the same period, shares of content on these accounts rose from 4.3 million to 76 million. Many other Lego-style videos have gone viral, too, garnering tens of thousands of likes and millions of views on Instagram, TikTok and X.

In recent years, policymakers concerned about artificial intelligence and influence operations have tended to focus on deepfakes — voice clones and fabricated videos that are designed to deceive. That threat remains urgent: In the first weeks of the Iran war, social networks were flooded with A.I.-generated videos and images depicting decimated buildings that were never attacked and demoralized soldiers who did not exist. But with the Lego-style videos and other satirical content, Iran and its supporters are using a different tool for influencing public opinion. It's not disinformation. It's not tra-



IRENE SUOZALO

ditional war propaganda. It's trolling. No one is being deceived because deception isn't the point. Reach, ridicule and cultural resonance are.

The concern is bigger than Iran. China, a more capable, wealthier adversary that has been surprisingly bad at the online propaganda game, is watching and learning. Internal documents from the Chinese A.I. company GoLaxy, detailed in The Times last

year, suggest that Beijing may already be considering experimenting with tools to track public debates within the United States, monitoring broad sentiment as well as the views and arguments of individual Americans. Pair that sort of capacity with the ability to use A.I. to generate large amounts of culturally fluent material, and you've got a recipe for increasingly sophisticated and targeted influence campaigns.

The U.S. should be developing a strategy for countering A.I. propaganda.

Anytime foreign adversaries have a tool for advancing their interests at our expense, the United States should have a robust strategy for countering its effects. In this case we don't, and we should be developing one.

The strategies we use to combat covert foreign influence, such as exposure and sanctions, are irrelevant to efforts that aren't hidden or illicit. The tactics we use to combat deepfakes, such as watermarking and labeling, aren't relevant to videos that aren't pretending to be authentic. And traditional tools of public diplomacy — education campaigns, formal statements of outrage — aren't nimble enough to counter propaganda that resembles entertainment and disseminates with meme-like scope and speed.

We need action on two fronts. First, we need regular threat intelligence reporting from the big American A.I. companies. Many major social media companies in the United States regularly issue public reports of possible threats, domestic and foreign, that they detect on their platforms. These reports are essential reading for government analysts and university researchers. Our A.I. companies should adopt this practice. If Chinese companies that specialize in influence campaigns are feeding information about their tools and strategies into American-owned large language models, we should know.

Second, we need a public diplomacy strategy that acknowledges the existence of this new trolling threat, systematically tracks these campaigns in real time and responds with public messaging that is also clever, shareable and fluent in the cultural idiom of its audience. In March, Secretary of State Marco Rubio directed U.S. embassies to push back on coordinated propaganda efforts abroad. That instinct is right, but it requires reckoning with this latest form of propaganda.

Iran is exploiting a gap that our current defenses weren't built to close. We need to address it before a more capable adversary decides to do the same.

## France Has a New Picture of the Holocaust

Jean-Marc Dreyfus

A Holocaust historian at the University of Manchester.

IN 1950, Robert Doisneau photographed a kiss you've surely seen. The man and woman seem to have been stopped by ardor amid the midday rush, in front of the Hôtel de Ville, Paris. Though staged, it became, nearly immediately, one of the most iconic images of the 20th century.

Surely unknown to Mr. Doisneau, nine years earlier, there was another kiss captured on film in Paris that was much more spontaneous, just as passionate — far more desperate — between two Jews about to be separated by the Vichy police. This kiss, found on a contact sheet of Nazi propaganda images in a Reims flea market six years ago, is now at the heart of a new exhibition of 98 Nazi propaganda photos at the Shoah Memorial in Paris curated by Lior Lalieu and me. This kiss, perhaps destined to become just as iconic, reveals a very different mid-century Parisian moment.

The photos provide a detailed visual account — almost minute by minute — of the very first, and little-known, roundup of Jews in France on May 14, 1941. That day, some 3,700 foreign-born Jews obeyed a summons by the Paris police with a notice, printed on light green paper (it became known as the “green ticket roundup”), for what they believed would merely be a check of their immigration and identity papers. The operation was organized by a man named Theodor Dannecker, the envoy of Adolf Eichmann in Paris. A photographer with the Nazi propaganda unit in the city was on hand to observe.

What gives these newly discovered photographs their singular power is not only what they show but the fact that they survived at all. They remind us that the past is never entirely buried, and that images can unexpectedly return to challenge the void of memory and representation. They function today not as propaganda, the purpose for which they were originally produced, but as fragments of truth — painful, incomplete and indispensable — that allow us to better understand the way the roundup was organized and conducted, and also to get a glimpse of the victims' shock, fear and pain.

There are only a few hundred photographs of roundups or murders of Jews from the 1930s and 1940s, a disparity of mass proportion considering the extent of the genocide. Some were taken by victims as acts of resistance, some by bystanders, and others, like this collection, were by an authorized photographer for the Nazi propaganda machine. From time to time, grandchildren of Nazi perpetrators find these images in attics and boxes when the older generation dies.

This particular group of photographs was meant to document a Nazi success story. They begin with the trap: Jewish men and their spouses were summoned to over 60 locations in Paris — police offices, various administrations and a sports facility in the 11th Arrondissement. Women, we know from eyewitness testimony, were asked to return home to gather items; a list was provided. When they returned, as the images we now have on hand show, they were barred from reuniting with their male relatives. The doors were closed and guarded by French policemen. We can see the women's pain, their bewilderment, many with bundles in their arms. We see couples as they part.



VIA MEMORIAL DE LA SHOAH

Other photos document the departure of guarded buses, commandeered from the Paris bus company, filled with the captured men. We see the arrival of the internees at Paris's Austerlitz train station. The same photographer captures the imprisonment of these Jews a few days later at the French internment camps Pithiviers and Beaune-la-Rolande. Some 700 of those Jewish men were later liberated, or escaped, after the

green ticket roundup. About 3,000 of those taken that day were later deported to Auschwitz-Birkenau; of that group, just a scant few returned.

Taken months before the decision to annihilate the Jews of Europe was made, these 98 photos do not show extermination camps, gas chambers, shootings or even starvation. What they do show is the careful, methodical beginnings of racially motivated

separation that later enabled the mass murder. The noted historian Raul Hilberg called this phase of the Nazi genocide “concentration.” There is no sign of outright violence; indeed, the despair of the ensnared Jews and their bewildered spouses is shown with a strange sensitivity by the German photographer.

At first the photos were kept on file by the German Propaganda Unit in Paris. After the war, six of the 98 photos were found in the archives of the NIOD Institute for War, Holocaust and Genocide Studies in Amsterdam, an indication that they were shared among the various propaganda units across Western Europe. A few others circulated among archives. But a vast majority were languishing, unseen, on contact sheets, until 2020, when two amateur collectors came upon them at a flea market.

They brought the sheets to Ms. Lalieu, the director of photo collections at the Shoah Memorial in Paris, who analyzed the images in an effort to identify as many people as possible. Ms. Lalieu also identified the photographer as Harry Croner, a man from Berlin, who had gone on to have a stellar career in postwar West Berlin, as a famous cinema and opera photographer. (Half-Jewish himself, he spent the end of the war in a labor camp.)

After the photos were found, Ms. Lalieu invited first- and second-generation survivors to the memorial in an attempt to identify their parents or grandparents in the pictures. There were some extraordinarily moving moments. Though only five attempts at identification have been successful so far, each marks a small victory against the backdrop of Nazi cover-up and of the looming loss of memory. A few of the photographs were shared publicly for the first time in 2021.

One year after these photos were taken, in mid-July 1942, about 13,000 Jews — mostly women and children — were rounded up, pulled out of Paris apartments and taken to an indoor sporting arena, the Velodrome d'Hiver, in southwestern Paris. They received little food or water and were subject to abject conditions. Depleted and distraught, they were sent from there to the internment camps of Drancy, Pithiviers and Beaune-la-Rolande. Later, a majority were sent on to Auschwitz.

It was an arrest of mass proportions, a stain on French history. We know this history from eyewitness testimonies, from memoirs of the few survivors and from the mass of police documents. Only a single photograph of the roundup is known. In it, five buses are parked alongside the Velodrome d'Hiver. The image was most likely taken clandestinely from an overlooking window. With the discovery and exhibition of this new group of photographs, the picture and understanding of the Holocaust in France have deepened.

The value of an image is entirely dependent on context. Taken to prove racial superiority, these 98 photos on display through December now show depravity. They also jar awake memory, shore it up against time. In an ephemeral era of mass documentation — of our own lives, of our public and private existence — the re-emergence of these photographs is a tangible reminder that some images refuse to be erased from our collective past.

Images from the past challenge the void of memory.

# The Future of Medical Advice Is Uncertain

**Michael Silverstein and John Wong**  
 Drs. Silverstein and Wong are former chairs of the United States Preventive Services Task Force.

**T**HIS month, Health Secretary Robert F. Kennedy Jr. fired the two leaders of the U.S. Preventive Services Task Force, a powerful expert panel whose recommendations shape preventive services, like cancer screenings, for millions of Americans. They were given little explanation for their firing, besides a vague pronouncement in a letter they received from Mr. Kennedy that it had been done "to protect the integrity of the task force's work."

One of us (Dr. Silverstein) served as the task force chair until March, when he left, as planned, when his term was up; the other (Dr. Wong) was one of the two individuals fired.

We had worried that something like this could happen ever since the Supreme Court affirmed almost a year ago that U.S. health secretaries can remove task force members at will. Mr. Kennedy had made it clear, repeatedly, that he had no love for the organization. He postponed all three of its scheduled meetings, blocked it from beginning work on new topics, suppressed new guidelines (including critical new recommendations on cervical cancer screening) and, most recently, accused it of being "lackadaisical and negligent."

This is not the first time Mr. Kennedy has fired health experts without cause or injected politics into the mission of what is supposed to be an independent health advisory panel. The consequences here could be particularly wide-ranging. The U.S. Preventive Task Force is hugely influential in determining what types of counseling, screenings and preventive medications doctors

recommend to Americans — and what insurance companies are required to cover, with no co-pays from patients. The screenings it recommends for cervical, colon, breast, prostate and lung cancer save tens of thousands of lives per year. Our recommendation for medication to prevent H.I.V. transmission could help eliminate as many as 90 percent of new H.I.V. cases among those at highest risk.

Our fear is that a task force beholden to political interests could roll back evidence-based recommendations and coverage. Or it could start recommending screening tests or other prevention strategies that are unproven, harmful or better for corporate profit.

## Firing disease prevention experts will not make us healthy again.

It is than they are for patients. Mr. Kennedy has already promoted dubious treatments for autism spectrum disorder and measles. It is easy to imagine him calling for prevention strategies that propagate his views on dietary supplements or consumption of red meat. Or offering recommendations that bolster the financial interests of the myriad individuals in his circle who profit from fitness and nutrition products.

Traditionally, our organization is made up of 16 members — all unpaid, highly qualified experts with experience in primary care. But for the better part of the past six months, vacancies have been building up, as members finished their allotted terms and Mr. Kennedy and his director of the Agency for Healthcare Research and Quality did not appoint new members. With the recent fir-

ings, there are now eight open spots. Only within the past weeks has Mr. Kennedy moved to fill them.

We understand that the Supreme Court has conferred on the health secretary the power to appoint task force members, but typically, the task force chairs play a significant role in this process; now that Dr. Wong and his fellow co-chair have left, Mr. Kennedy will be able to reconstitute the organization without any guidance (or as he may see fit, interference) from people who understand it most intimately.

If Mr. Kennedy tries to influence task force decision making, the next leaders of the task force cannot be truly independent — and trust in the institution from doctors and other health care providers will crumble.

We do not yet know who will replace the dismissed leaders or if the other eight members of the task force will remain. But we do know that for the foreseeable future, they will be working in service of an administration with little respect for scientific processes. The American people can trust disease prevention guidance only if it's produced by people who are not influenced by political ideology, corporate dollars, advocacy organizations or preconceived notions of what we should do to promote our health.

Mr. Kennedy and Roger Klein, the director of the Agency for Healthcare Research and Quality, should be called to testify before Congress about their rationale for these firings. And the task force should be allowed to continue its work.

Patients across the country deserve to be guided by advice from primary care clinicians with the best and most up-to-date science at their fingertips. Without a trusted and independent task force, the health of our country will worsen.



KEN CEDENO/REUTERS

## LETTERS

### Falling Test Scores: Reasons and Fixes

TO THE EDITOR:

Re "The Slump in Student Achievement Persists" (The Upshot, May 16):

Our tragic educational decline requires preaching as well as teaching. The teachers are the foot soldiers, but we have no generals inspiring the entire population, not just the students, to find the pleasure in deep and rational knowledge.

There are many smaller reasons like social media for student distractions, but the overarching culture is one that favors shallow entertainment rather than a rigorous educational curriculum. From the highest levels of government to the kitchen tables, education is disparaged, often for political reasons.

What we need more than anything is a Martin Luther King Jr.-type figure to inspire, through eloquent rhetoric, the value and beauty of knowledge and the adventure of learning.

DAVID LIGARE  
 CARMEL VALLEY, CALIF.

TO THE EDITOR:

I was struck by an assumption in this article: that declining test scores mean something negative. What if we are testing the wrong things to determine student progress?

I don't think kids are getting dumber, so perhaps they are learning something else besides a curriculum that may no longer be relevant to their lives or futures.

Perhaps they no longer need to focus on the minutiae of

sentence structure, and instead what's going to be relevant to them is an ability to scan vast quantities of information to process and identify meaning in it, i.e., scrolling. They are unconsciously aware of that and adapting.

So perhaps it's not the kids who are the problem, but our outdated educational system. That's what's fallen behind. The kids' learning abilities might be just fine, and the tests are just for the wrong things.

JESSICA MORTON  
 LLANFAIRFECHAN, WALES

TO THE EDITOR:

The recent data on falling math and reading scores will be troubling for many parents because they signal a crisis in our education system. Yet the crisis that these scores suggest extends far beyond the school.

Literacy and math knowledge are foundational to students' learning how to think critically. Without the ability to think critically, our youth are easily victimized by the machinations of predatory capitalism, autocracy and propaganda.

Although it is true, as stated in the report, that there are many reasons for these deteriorating test scores, the normalization of phone culture in young people's lives has been shown to correlate directly with their diminished literacy in both math and reading.

ERIC J. WEINER, NEW YORK  
 The writer is a professor of education at Montclair State University in New Jersey.

### The Yuppie Factor

TO THE EDITOR:

Re "We Still Live in the World That Yuppies Created," by Dylan Gottlieb (Opinion guest essay, May 10):

Mr. Gottlieb's essay provides an insightful analysis of the world yuppies created, including their prevalence in the ever more important financial services sector of the economy. It correctly notes the populist backlash, whether from Ohio to Staten Island, that was successfully exploited and fueled by Donald Trump.

It is ironic, however, that the backlash has yet to impose any monetary costs on that financial sector. After all, the result of the triumph of Mr. Trump and his allies has meant only less regulation and lower taxes for the financial sector.

Meanwhile, blue-collar America is no better off and struggles to keep up with inflation and obtain medical care. Thus, it is perhaps too early to declare winners and losers. Or is the answer that the haves always win?

JAMES BRIGAGLIANO  
 ARLINGTON, VA.

TO THE EDITOR:

I had a boss decades ago who said, "People do what is expected, not what is intended."

We reduced federal accountability when No Child Left Behind ended, and scores went down. We allowed cell-phones and laptops, known distraction machines, in our schools, and scores went down. If we don't have an objective way to measure progress, we can't hold teachers and school administrators accountable.

It seems that the politician's answer is always to throw more money at this problem. Perhaps better answers lie in setting high standards, eliminating the device distraction from the classroom, having objective measures of student progress and holding those responsible for delivering a good education to our students accountable.

We are in a global environment in which education, critical thinking and creative skills will define the success of nations. We are not just failing our children; we are also jeopardizing our future as a nation.

PHIL SHEVRIN  
 LEXINGTON, MASS.

# Here's the Easy Way to Make the Rich Pay Their Fair Share

**Zachary Liscov**

A professor at Yale Law School who served as the chief economist of the White House Office of Management and Budget from 2022 to 2023.

**T**HE United States is seeing an increasing concentration of wealth at the very top and a worsening national debt. For many Americans, taxing the rich more is an obvious move.

Ask tax policy experts how to do this, and you will often hear novel proposals to curb the many intricate ways the rich make and hide their money: A wealth tax. A tax on unrealized gains. A tax on the loans that billionaires take against their stock. These ideas, now common in progressive tax thinking, come with serious catches, legal or arithmetical. The tax code has structural flaws, and many of the ideas would be good in theory. But pursuing them could result in little or no new revenue for the government.

The boring truth is that Congress can accomplish a lot simply by raising the rates of the taxes already on the books.

Elizabeth Warren, a Democratic senator from Massachusetts, has proposed a 2 percent annual levy on fortunes above \$50 million, rising to 3 percent on those over \$1 billion. There are serious constitutional and policy arguments for this idea, but the Supreme Court's current members would probably strike it down. (A California proposal for a state-level wealth tax would not face the same legal barriers, but it would be a partial response to problems that are national in scale.)

Then there are proposals for a "mark to market" tax, which would tax unrealized capital gains — the appreciation in the paper value of assets such as stocks — every year, not just when an asset is sold. Ron Wyden, a Democratic senator from Oregon, has proposed a billionaire income tax along these lines. Such a tax would raise a lot of

money for the Treasury. But it faces its own constitutional hurdles. The Supreme Court has left the legal status of unrealized-gains taxes deliberately unresolved, and a market tax's chances at the court would be, at best, 50-50. Despite the proposal's many appeals, building a generation of fiscal policy on a coin flip would be risky.

Another idea is imposing a borrowing tax, a policy aimed directly at the widely criticized "buy, borrow, die" loophole. The loophole allows the rich to take loans against their portfolios and use the money to finance glamorous lives. They pay no capital gains tax because they avoid selling the assets — often stock that has risen in value — that they use as collateral for the borrowing that sustains their lifestyles. When they die, they pass on their assets to their heirs, who, because of the "stepped-up basis" loophole in inheritance law, can avoid paying capital gains taxes even if they sell those assets. A borrowing tax would discourage the buy, borrow, die strategy and restore some fairness to the tax code. It's a policy I like — I proposed my own version of it.

Except the wealthy are not using the buy, borrow, die loophole all that much. In work with Edward Fox of the University of Michigan, I looked at two decades of data measuring how much the rich actually borrow. The top 1 percent borrow an amount equal to roughly 7 percent of their economic income each year — defined broadly to include the gains on stocks they haven't sold. Their unrealized gains over the same period were about 20 times that amount. At current tax rates, imposing a borrowing tax would raise about \$50 billion over 10 years — a paltry number relative to the size of the federal budget. It's just not where the money is.

Congress has a simpler, tried-and-true tax policy to choose from: raising the rates. Current taxes already reach most of the rich's economic income, which includes unrealized capital gains. The existing income

tax captures about 60 percent of the top 1 percent's economic income and roughly 71 percent after adjusting for inflation. Even for the top 0.1 percent, about 60 percent is taxed, adjusted for inflation.

Measured this way, the ultrarich mostly aren't escaping the tax system through exotic loopholes. They mostly increase their fortunes with and spend regular taxable income — salaries, dividends, interest, business profits, realized capital gains — and they earn a lot of it.

This means the most powerful lever is also the simplest one. Restore the top marginal ordinary income tax rate to its pre-2017 level of 39.6 percent — which, but for President Trump's tax cuts, would have applied to income over \$548,750 this year. And raise the (much lower) top capital gains rate. Increasing these rates would generate hundreds of billions of dollars over a decade. That is much more than a borrowing tax could plausibly raise, and without the legal risk that would come with a wealth tax or a mark-to-market tax.

Yes, higher rates can change people's behavior, encouraging some to find ways to avoid paying more in income taxes. But revenue estimates already consider this effect.

In addition, raising the corporate tax rate from 21 percent toward the 35 percent it had been set at historically would add hundreds of billions in revenue for the government. Congress could bring in even more by ending the step-up basis rule, which allows heirs to inherit assets and owe nothing in capital gains taxes on the amount those assets have appreciated since they were purchased.

None of this would require defending untested constitutional theories or imposing complex asset valuation schemes. We've done almost all of it before. True, raising rates is politically hard. But the other options on this list would arguably be harder to get through Congress, for an uncertain or

### Congress should just raise the rates of taxes already on the books.

modest payoff. A wealth tax that gets struck down or a mark-to-market regime tied up in years of litigation would raise zero dollars any time soon. A borrowing tax would raise some money but not much.

Public outrage at billionaire tax dodging is understandable. But the country cannot afford to spend huge amounts of political capital to pass experimental tax policy that is based on exaggerated stories about how the ultrawealthy avoid paying taxes or on wishful thinking about what the current courts will allow. Raising the rates — the simple, boring answer — is where the real money lies.



GEORGE WYLES/OLIO

OPINION

Hunter Meets Candace on Israel



**MAIN STREET**  
By William McGurn

Normally, the son of a president of the United States wouldn't sit down for a chat with a podcaster building on a shared antipathy to Donald Trump. So it was Thursday when the right-wing Candace Owens aired her podcast interview with Hunter Biden, bad-boy son of Joe Biden. Over two hours, the discussion ranged from the younger Mr. Biden's crack addiction to religion and painting. In its article about the interview, the Israeli daily Haaretz characterized Hunter as asserting "a clear linkage between Israeli intelligence and conspiracies aimed at bringing down [President] Biden."

Although the interview was mostly common with his dad, but it's relevant that notwithstanding a long career in the Senate and two terms as vice president under Barack Obama, the elder Mr. Biden was never much of a leader on Israel—or any other big issue. As the Democratic Party drifted from its

murder of a population in Gaza," Hunter Biden said. "Whatever you think about my father's policy as it relates—I always say to people, 'You know one thing he didn't do? He didn't green-light to turn Gaza into a Trump golf course, you know, with the maître d' being Jared Kushner with \$4 billion in Saudi money.' It's despicable."

It isn't the first time Hunter Biden has popped off on Israel, though he also says he backs the Jewish state. "I support Israel," Mr. Biden told "Obama's with Andrew Callaghan," a YouTube program, in July. "I definitely support my Jewish wife and my Jewish son. And I believe in Israel's right to exist in peace and prosperity."

In his memoir "Beautiful Things," Hunter confesses he even has the Hebrew word for peace—*shalom*—tattooed on his arm. It matches one that his Jewish South African wife, Melissa Cohen Biden, had when she met him.

The younger Mr. Biden isn't a fan of Israel's longest-serving prime minister, Benjamin Netanyahu. That much he has in common with his dad. But it's relevant that notwithstanding a long career in the Senate and two terms as vice president under Barack Obama, the elder Mr. Biden was never much of a leader on Israel—or any other big issue. As the Democratic Party drifted from its

pro-Israel past, Mr. Biden drifted with it. That increasingly meant clashes with Mr. Netanyahu.

Hunter doesn't see it this way, of course. He calls the Washington-based left-wing Party "the Epstein class" after Jeffrey Epstein, the financier and convicted sexual predator who committed suicide in federal prison while awaiting trial on child sex-trafficking charges.

**What is Joe Biden's son doing on the antisemitic right-wing podcast?**

Hunter claims his dad never fit in with this elite, and they were out to get him. Judging from Joe Biden's humiliating withdrawal from the 2024 presidential race, they succeeded.

But this is fantasy. The Democratic Party Hunter Biden imagines as having treacherously done his father in had in fact propped Joe Biden up for years and seemed willing to do it again. Joe's problem in 2024 was Joe.

The elder Mr. Biden's infirmities became impossible to ignore after the June 27, 2024, presidential debate in Atlanta. When Mr. Biden came out, the world saw a

feeble and sometimes confused old man who looked like he might not make it to the podium. After that, Mr. Biden was out—and he seemed to be the last to realize it.

What was Hunter's role in all this? We don't know because Ms. Owens never asks. At the outset of the interview, she puts it this way: "I'm not going to make you say anything bad about your father because that would just be completely demonic."

But not asking key questions about what was going on in the White House is shirking a duty. There are still many questions that deserve answers, and they can be asked in a way that doesn't attack former President Biden.

One that comes to mind is whether Joe stayed on too long because his friends and family didn't want him to step aside. Another has to do with all those snide digs on Israel. Maybe Ms. Owens could have asked Hunter if his father or Zohran Mamdani better represents the Democratic Party these days.

On Israel Mr. Mamdani seems to represent the view now ascendant in the Democratic Party, while the allegedly pro-Israel-but-anti-Netanyahu position of the Biden camp looks increasingly to be a thing of the past. Would have been nice if Ms. Owens had asked why.

Write to mcgurn@wsj.com.

BOOKSHELF | By James Romm

Sparta's Caste Of Conquerors

**Sparta**  
By Andrew Bayliss  
Norton, 384 pages, \$35

For those who study ancient Greece, the classical era, roughly the fifth and fourth centuries B.C., presents a case study in the failure to learn from history. Near the start of that period the Greeks saw the Persians, rulers of a vast empire, overreach themselves and fall in two invasions of Europe, the second time catastrophically. Yet in the wake of those episodes, the reigning Greek powers of the day, Athens and Sparta, did more or less as the Persians had done. They, too, overreached, invaded lands they couldn't conquer or couldn't control, and brought disasters down on their citizenries.

Eloquent voices warned the Greeks not to follow this path, to no avail. The playwrights of Athens dramatized the tragic tales of kings, including Xerxes of Persia, whose overweening ambitions led the rulers to ruin. The "Histories" of Herodotus, likely composed in the mid-fifth-century B.C., recounted the Persian defeat as a paradigm of the perils of reckless imperialism. An inscription at the shrine of Apollo at Delphi fruitlessly warned the oracle's visitors *médon agan*, "nothing too much."

The tale of Athenian overreach is better known today than is Sparta's counterpart, largely because Thucydides, one of antiquity's finest historians, captured it in his account of the Peloponnesian War, which began in 431 B.C. The end of the war and the aftermath of Sparta's victory over Athens, through the years 404-371 B.C., are known to us through the writings of Xenophon, a less insightful observer. Xenophon at times tries to show that the Spartans, too, abandoned self-restraint and overextended themselves. But his lesser narrative skills, and his tendency to minimize Spartan errors, make that theme hard to discern in his works.

Andrew Bayliss, the author of "Sparta: The Rise and Fall of an Ancient Superpower," is a defter writer than Xenophon. As the book's subtitle indicates, Mr. Bayliss, a scholar of Greek history at the University of Birmingham in England, situates the Spartans in the time-honored pattern of overreach leading to downfall. The story he tells, especially in its grim final chapter, should be required reading for leaders of modern nations.

The bizarre social system from which Sparta derived its strength goes back to its early history. Working from patchy and near-mythical sources, Mr. Bayliss constructs a plausible theory of how the Spartans, members of the Dorian subgroup of the Greek people, arrived in their home in the south of the Peloponnese, the vast southern peninsula of Greece, and began a series of wars with their neighbors. By the seventh century B.C., their conquest of the Messenians, the Greeks in the fertile lands to their west, had provided them with a huge body of slaves, known as helots, whose labor supplied their food crops.

Liberated from farming and fearful of helot revolts, the Spartans developed their austere lifestyle and rigorous program of military training. Their system ensured that Spartan males—known as *homoioi*, or "equals"—because the state allotted them uniform tracts of land, could live as "gentlemen of leisure," as Mr. Bayliss terms them (though "leisure" should be understood as the freedom to exercise and drill constantly in a kind of lifelong boot camp). Helots fed these high-caste soldiers and serviced their every need; one source reports that each Spartan who went into battle against the Persians was attended by seven helots.

**Sparta's class of elite warriors were freed from ordinary work, their needs met by slaves. The system had a built-in weakness.**

Mr. Bayliss seldom passes judgment on the Spartans and notes that, in recent centuries, they have had both admirers and detractors. But their need to keep their collective boot on the necks of their slaves—in one annual ritual, the *krypteia*, Spartan youths tried to hunt and kill leading helots—strikes him as the mark of a "bad" relationship. "The Spartans might be viewed as parasites, feeding off the forced labor of their helots," he opines.

Sparta could mold its citizens into super-warriors but could not increase their numbers. With the high bar it set for entry into its elite training system, and its sclerotic marital customs limiting birthrates, its population of *homoioi* decreased while neighboring states were growing. Sparta needed allies to fill out its battle array, so it installed subservient leaders throughout the Peloponnese, their allies in the war against Athens.

Mr. Bayliss gives a cogent account of the Peloponnesian War, a 27-year slugfest that finally resulted in Sparta's domination. He sees through the high-minded claim made by the Spartans to be defenders of freedom fighting a "tyrant city," Athens, that oppressed its imperial subjects: "After all the noises they had made about liberating Greece from Athenian tyranny, [the Spartans] simply replaced it with their own." Swollen with confidence after defeating Athens, Sparta embarked on its own imperial program, compensating for its dwindling numbers by keeping an ever-tighter grip on its subjects.

The muster of Spartan *homoioi* was down to about 1,000 when an enraged Spartan king, Agesilaus, forced a showdown with Thebes, a far more populous city. At the Battle of Leuctra in 371 B.C. the Thebans judged, correctly, that Sparta's Peloponnesian allies were tired of fighting its wars and would be slow to engage. The leader of Thebes, Epaminondas, reportedly held up a snake and crushed its head, to show his troops how defeating those thousand Spartans would neutralize the rest of the enemy army. The success of that gambit ended Sparta's reign as a Greek superpower.

Mr. Bayliss contrasts the failure of Sparta with the success of Rome, a state that freely admitted non-Romans, including conquered nations, to citizen status. "The Spartans' stubborn refusal to share their wealth and conquests with other Greeks limited their potential to grow," he writes. "The only freedom the Spartans were interested in was their own." Those who contemplate Sparta's trajectory will not, one hopes, be as blind to history's lessons as the Greeks themselves were.

Mr. Romm, professor of classics at Bard College, is the author of "Since You're Mortal... Life Lessons From the Lost Greek Plays."

Peace May Not Be at Hand in Iran



**GLOBAL VIEW**  
By Russell Mead

Is peace at hand between the U.S. and Iran, or is talk of an end to the war just more hype and spin? Is the potential agreement, as President Trump insists, a good deal that is much tougher than anything the Obama administration managed to negotiate? Or is it the thinly disguised surrender of a Trump administration desperate to liquidate a war the president now privately feels he should never have launched?

As of Memorial Day, nobody, possibly including both Mr. Trump and Iran's supreme leader, seems to know. That shouldn't be surprising. Both the American president and his Iranian opponents believe that the purpose of speech is less to inform than to spin. Add this to the sensitivity and secrecy with which delicate diplomatic negotiations must proceed, and we have a fog of misleading statements, dramatic but disingenuous social-media posts, and intentionally obfuscatory leaks.

Both sides have an interest in proclaiming an imminent peace. Fuming American motorists want prices to drop at the pump. Mr. Trump's political allies, haunted by falling poll numbers before the midterm elections, pine for good news.

Anxious American allies in the region and beyond long for an end to the war's energy and trade disruptions. Rumors of peace set financial markets surging. Rumors of renewed hostilities leave traders reeling in despair.

On the Iranian side, the rattled political authorities need some good news about sanctions relief to mollify a restless public. Leaders, not unreasonably fearing more waves of Israeli decapitation strikes, yearn for an end to that anxiety. And any result

**Both sides want the war over, but the gap between their basic requirements is wide.**

that can be spun as a victory for the Islamic Republic against Israel and the U.S. would provide badly needed legitimacy to an untested, unloved and nepotistically selected supreme leader.

The common interest in ending the war drives Iran and America together and gives all parties an incentive to hype the prospects for peace, but the gap between the two sides' minimum requirements makes an actual agreement fiendishly hard to work out. Having alienated one wing of his coalition by launching the war, Mr. Trump seems reluctant to enrage another by accepting a weak peace. The Iranian regime

feels that its ability to block the Strait of Hormuz and damage its neighbors by drone and missile attacks entitles it to painful concessions from the U.S. side.

Those who see a softening of the American position in recent days aren't wrong. Administration critics blame Israel for Washington's decision to attack Iran, but Saudi Arabia was also in favor of settling scores with Tehran once and for all. That has changed. Iranian attacks have awakened the Saudis to the vulnerability of their energy infrastructure as well as the desalination plants on which much of the kingdom depends.

Saudi Arabia's cities rely heavily on massive desalination complexes. The capital, Riyadh, is particularly exposed, as most of its water comes through pipelines from large desalination plants on the Gulf. If those facilities were taken out of commission, much of Riyadh's population would likely have to be evacuated within days.

Attacks on desalination facilities whose primary purpose is to provide drinking water to civilians constitute one of the most heinous imaginable war crimes. As attacks on desalination plants in Kuwait and Bahrain have demonstrated during the current war, that isn't a problem for the self-proclaimed religious zealots of the Islamic Republic of Iran. The Saudis have taken note.

The threat to Gulf desalination facilities has shaken the coalition that supported the war and may loom larger in Iranian diplomacy than Iran's threats to shipping in the Strait of Hormuz. The Trump administration faces a difficult choice. Does it reassert the Gulf Arabs by deterring Iranian attacks on their water supply via threats of massive retaliation, or does it seek a quick end to the war at the price of more favorable conditions for Iran?

Mr. Trump's demand that a group of Arab countries plus Turkey and Pakistan should simultaneously sign on to the Abraham Accords likely reflects the administration's quest for a bright and shiny diplomatic win to offset compromises with Iran. At a time when memories of the Gaza war and the absence of progress on Palestinian issues have made Israel even more unpopular globally and among Muslims than usual, that would be a stiff price for the Saudis to pay.

The issue of water security for the Gulf populations will grow. Unless the U.S. is prepared to accept a long-term Iranian hegemony over the Gulf states as well as the Strait of Hormuz, it will need to find an effective deterrent to Iranian attacks on vital infrastructure. The choice may come down to providing a credible nuclear shield for our Gulf allies or abandoning them to the tender mercies of the Islamic Republic.

Reports of Woke's Death Are Exaggerated

By Paul du Queney  
And Judith Miller

Gov. Ron DeSantis says Florida is "where woke goes to die," but the University of Florida may be where woke goes to lead.

Last year the Florida Board of Governors, which oversees public universities statewide, rejected Santa Ono, the University of Florida trustees' choice for president, over his support for DEI and other woke policies while University of Michigan president. A search committee has recommended another finalist devoted to DEI: Stuart Bell, a former University of Alabama president. Mr. DeSantis endorsed Mr. Bell as a "great selection," but his prospects are far from certain.

Mr. Bell implemented DEI throughout his decadelong tenure at Alabama. These policies included an ambitious program that promoted race-based recruitment of students and faculty and the hiring of a DEI guru, G. Christine Taylor, as vice president and associate

provost for DEI and of some 30 other DEI personnel, including college deans. In 2019 Alabama boasted that 36% of undergraduate courses were "diversity-related." Mr. Bell said in a promotional video that Alabama had "over 70 student organizations which have diversity and inclusion as a focus."

In 2019 Mr. Bell convened a committee to adopt stricter DEI protocols. After George Floyd's death, the university opened an Intercultural Diversity Center, a Hate & Bias Hotline and a Safe to Pee program to deter "discrimination against gender variant people in public restrooms."

The Alabama Legislature banned campus DEI in 2024, and the university took the new law as a mandate to change its nomenclature. Ms. Taylor retained her job under a new title, vice president and associate vice provost for opportunity, connections and success. The Intercultural Diversity Center became simply the Intercultural Center.

Why is it so hard to rid universities of DEI, even in crimson states like Alabama and Florida?

The answer at the University of Florida could be its trustees' reluctance to follow university regulations and state law, which require transparency and ban DEI. Mr. Bell is heavily championed by Morteza "Mori" Hosseini, chairman of the board of trustees. He is a prominent Republican donor who supported Mr. Ono and expressed dismay when he was blocked. This time, Florida Board of Governors chairman Alan Levine has written Ray Rodrigues, chancellor of Florida's State University System, asking him to investigate whether Mr. Hosseini over-

stepped his authority in the selection process.

The University of Florida may pay a financial price if Mr. Bell gets the job. After Mr. Ono's rejection, the university hired as interim president Donald Landry, a distinguished medical academic celebrated for promoting institutional neutrality, free speech, and the elimination of DEI. Dr. Landry's contract provides for a \$2 million severance payment if he isn't hired permanently.

Meantime, Education Secretary Linda McMahon has said that Florida needs a president who will "commit the fight to get discriminatory DEI out of our schools and universities." Her department has the power to withhold federal money from schools that violate civil rights. If Florida goes woke, it could go broke.

Mr. du Queney is president of the Palm Beach Freedom Institute. Ms. Miller is a fellow at the Manhattan Institute and contributing editor of City Journal.

## OPINION

## REVIEW &amp; OUTLOOK

## Will Trump Bail Out Iran's Regime?

Is that it? The American people are left to wonder as the terms of President Trump's emerging "memorandum of understanding" with Iran leak to the press. While the U.S. can claim real achievements from 38 days of war, the job isn't done and 47 days of cease-fire may deliver a strategic setback.

The preliminary deal, as mooted in the press, is for both sides to end their blockades, and perhaps for the U.S. to sweeten the pot financially, while talks on nuclear issues and further sanctions relief continue for 60 days or more. A U.S. official says, but Iranian officials deny, that the regime gave assurances that a final deal would include "disposal" of its enriched uranium.

The basic problem lies with ending U.S. pressure before dismantling the nuclear program. If the blockade ends and Iran can sell its oil, all that's left to coerce it into nuclear concessions is the threat of renewed war.

But Mr. Trump wasn't willing to do that after Iran reneged on reopening the Strait of Hormuz and attacked U.S. forces and Gulf allies. How credible will the threat be 60 days closer to midterms, when it would trigger a new Iranian blockade of Hormuz? A pledge not to build a nuclear weapon means nothing because the regime has always said that while doing the opposite.

Israeli Prime Minister Benjamin Netanyahu says Mr. Trump agrees that a final deal must dismantle Iran's nuclear enrichment sites and remove its enriched uranium from the country. U.S. officials have also been briefing that all the "nuclear dust" must go, but would they retain the leverage to insist on that?

Some press reports have the U.S. settling for Iranian assurances not to use underground nuclear facilities and for downblending—not removal—of only the 60% enriched uranium. This would leave Iran with large quantities of 5% and 20% enriched uranium, which can easily be enhanced to weapons grade. With the potential enrichment site beneath Pickake Mountain also intact, Iran would remain a nuclear danger. This would require the strictest inspections, which again raises the leverage question.

The U.S. and Iran also have yet to agree on how long Iran would be banned from enriching uranium. The question may be academic because the regime only has to wait out the Trump Administration to gain a freer hand. Iran's history

is to drag out negotiations, and this preliminary deal is no doubt part of that strategy.

Reopening the Strait will reduce oil prices, but in the President's reluctance to do so by force, he has signaled that Iran holds the trump card. Even if successful, the deal would leave that card intact and looming.

Iran insists that no deal will restore the Strait to its status quo ante. It could allow the passage of a prewar number of vessels, state media says, but on Iranian terms and under its control. Recall that tanker traffic decreased after Iran had promised a gradual reopening with the April 7 cease-fire.

This is reason enough not to give Iran sanctions relief up front. U.S. officials say relief will be tied to performance, and they will need to hold to that to get a decent final deal.

Meanwhile, don't ask about Iran's ballistic missiles and proxies, two goals of the war. While both have been damaged, formal limits or restrictions have been pushed off to "regional discussions." The Israelis say they will retain freedom of action to fight Hezbollah in Lebanon under the deal, though Iranian sources deny it. Iran wants its terror proxy to be able to carry out a war of attrition against Israel without consequence.

\* \* \*

Much of the press wants to debate whether this amounts to a better or worse deal than Barack Obama's in 2015. The major difference in our view is the military strikes: Fordow, Natanz and Isfahan were severely damaged in June. Enrichment has been stopped, at least for now.

Mr. Trump on Sunday pushed back against critics of the deal, saying "I don't make deals." But it's fair to wonder if he isn't feeling the growing pressure at home of rising gasoline prices and bond yields as midterm elections get closer. That's no doubt partly behind his desire to reopen the Strait even on Iran's terms.

We'd add that a bad deal would leave him worse off politically, even if gas prices fall. Even a half victory by Iran would hurt America's standing—and Mr. Trump's.

Iran's regime went into this war facing domestic political and economic crises. War has made these worse. Saving such a regime now with an economic bailout would be the real betrayal—of the U.S. interest even more than the Iranian people.

## The New Big Labor GOP

The latest sign of Republican midterm panic is the surrender to Big Labor policies that unions couldn't pass when Democrats ran Congress and Joe Biden was President.

We told you last week about the Railway Safety Act, a classic featherbedding operation to mandate two engineers per freight train when Europe gets by fine with one. This JD Vance gift to the Teamsters passed the House Transportation and Infrastructure Committee last week, 54-11, after President Trump endorsed it with a social-media post.

On Wednesday seven House Republicans also crossed the aisle to hand unions the 218 votes they needed in a discharge petition to bypass a committee and send the Faster Labor Contracts Act (FLCA) to the House floor. The GOP Members who confuse the priorities of union bosses with the needs of union workers are West Virginia Rep. Riley Moore, New Yorkers Nick LaLota and Mike Lawler, Nebraska Rep. Don Bacon, Ohio Rep. Max Miller and Pennsylvania's Rob Bresnahan and Brian Fitzpatrick.

The law gives unions a bluejean against business by mandating government arbitration if

companies don't reach agreements on an approved timeline of when unions are first certified. If the employers and the union can't agree on a contract within 90 days, government would step in for mediation followed by binding arbitration. Individual workers are cut out of the process.

This is an invitation for unions to refuse to compromise on their demands because an employer can oppose a deal and still may have to accept it. Arbitrators often have minimal operating knowledge of a particular company, its constraints or its priorities for growth. Rulings can be based on industry trends and generalities. An arbitration panel decision would be binding on the parties for two years unless amended "by written consent of the parties."

The FLCA is a plank in the Big Labor PRO Act that failed to pass Congress in the Biden years. The bill is now likely to pass the House. The GOP Senate could kill it, but Josh Hawley (R., Mo.) is sponsoring the corresponding legislation there. The pro-union Republicans fancy themselves as tribunes for the common man, but they're really rubber stamps for labor bosses who are allies of the Democratic Party.

## Warsh's Internal Opponents Fire Away

Kevin Warsh took office as Chair of the Federal Reserve on Friday with a message of reform for the central bank. To get a sense of how hard this job will be, consider that two members of the ancient regime fired warning shots even before Mr. Warsh took the oath of office.

First, Fed Governor Michael Barr openly declared his opposition to reducing the Fed's \$6.7 trillion balance sheet. "I think shrinking the balance sheet is the wrong objective, and many of the proposals to meet this objective would undermine bank resilience, impede money market functioning, and, ultimately, threaten financial stability," Mr. Barr said on May 14 at New York University.

That last point leaps out since the most recent threat to financial stability came on Mr. Barr's watch as Fed vice chair for supervision. He missed the interest-rate risk—the most basic of banking risks—to Silicon Valley Bank and Signature Bank. Mr. Barr resigned as the supervision vice chair last year ahead of his likely removal by President Trump.

Mr. Barr's balance-sheet arguments aren't novel and are best addressed another day. What's notable about his speech is that he knows that reducing the Fed balance sheet, which exploded after the 2008 financial panic, is one of Mr. Warsh's stated priorities. Mr. Barr, a protégé of Sen. Elizabeth Warren, is declaring himself as an internal opponent on the Fed board even before the new Chairman has a

chance to settle into the job.

Next up was Fed Governor Christopher Waller, who said in a speech on the day of Mr.

Warsh's confirmation that he no longer favors cutting interest rates. "I can no longer rule out rate hikes further down the road if inflation does not abate soon," Mr. Waller said regarding the impact of the

Iran oil shock on prices. A fed-funds rate hike may be needed in the future, though the next Federal Open Market Committee meeting isn't until June 16. But what's notable here is Mr. Waller's switcheroo. As recently as January he dissented in favor of a rate cut on grounds of weakness in the labor market. In April he voted for a FOMC statement that contained an "easing bias." This was when financial conditions were hardly tight.

In January Mr. Waller was competing against Mr. Warsh for the Fed chairmanship, and President Trump was calling for a rate cut. With the labor market little changed, Mr. Waller now rules out a rate cut after Mr. Warsh beat him out for the job. Mr. Warsh can be forgiven for wondering if Mr. Waller is declaring his doubts about the new Chair and signaling to the press to watch his space.

You'd think for the good of the institution—you might even say for its independence—that Fed governors would refrain from boxing in a new Chairman. But we live in the age of performative central banking. At least Mr. Warsh is finding out who his internal opponents are.

## LETTERS TO THE EDITOR

## Families Want Drug Therapies Approved Fast

Tomas Philipson's May 19 op-ed ("The FDA's New Leaders Can Unleash Innovation") appropriately highlights how regulatory efficiency can directly affect patients and families.

As a pediatric ophthalmologist treating children with progressive myopia or near-sightedness, I see firsthand how delays in access to innovation can affect long-term health outcomes.

Across the U.S., physicians are already caring for large numbers of children with worsening myopia and increasingly using compounded low-dose atropine to slow disease progression. Families are seeking these treatments because they want to preserve their children's vision and quality of life. Physicians are prescribing them because growing clinical evidence and real-world experience suggest meaningful benefit.

At the same time, compounded medications can vary in formulation, stability and consistency. This is why many clinicians and families have been awaiting standardized, FDA-reviewed therapies that can

provide greater manufacturing reliability, quality assurance and confidence in long-term use.

The FDA's role in ensuring safety and scientific rigor remains essential. But there is also an opportunity for regulators, physicians, researchers and industry to work collaboratively to accelerate access to promising therapies. Innovations such as SYD-101 from Sydnexis, which is a treatment for pediatric progressive myopia, have demonstrated encouraging clinical trial results. Similar approaches are already being adopted internationally, including in Europe and Asia. Efficient and science-driven regulatory pathways don't weaken patient protection. For families watching their children's vision worsen year after year, that progress can't come fast enough.

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Director, Division of Ophthalmology  
Rady Children's Hospital of  
Orange County  
Orange, Calif.  
Dr. Bhola serves as a consultant  
to Sydnexis.

## Trump's Negotiators Should Travel to Ukraine

Regarding Walter Russell Mead's "A Glimpse at the Future of War" (Global View, May 19): President Trump wants to appear as a neutral mediator to compel an end to this shockingly lethal drone war. But his lead negotiator has been to Russia at least seven times and never to Ukraine.

While on the trip with Mr. Mead, I realized that these U.S. negotiators would be wise to go to Kyiv. They should observe a drone-operation center and learn about the enterprise and wit of the private citizens who are innovating, adapting and making Ukraine a promising place in the free world to do business.

By visiting, one can see the people hold out hope for America, and for Mr. Trump specifically, while engaging with the patriotic people who are go-

ing to work and raising children amid regular trips to the bomb shelters.

Visiting the country also makes clear the reality that Ukrainians are defending their home against a country that also views America, and the West, as an enemy. Secretary of State Marco Rubio extolled and urged Europeans to do their part to help strengthen the West in his speech in Munich, where he said, "We in America have no interest in being polite and orderly caretakers of the West's managed decline." Vladimir Putin has an interest in speeding that decline. Backing Ukrainian victory is a better way to end the war—and in a way that supports Mr. Rubio's vision. Not Russia's.

REBECCA HENRICH  
Hudson Institute  
Washington

## How to Deal With Students Using AI to Cheat

"Easy 'A's Are Everywhere Since ChatGPT's Debut" (U.S. News, May 14) may be good news in disguise. While ChatGPT and other AI tools may be amplifying the problem of cheating, technology has facilitated student cheating for some time.

Solution manuals have long been online, and any number of web sites have enabled students to cheat on assigned homework. I'm a professor of

mechanical engineering, and this became apparent to me about 20 years ago. Since then, I've used only work done in a proctored environment in computing my students' grades. Many professors bemoan cheating but tend to do little about it, often claiming that students who cheat only harm themselves by not really learning the material. But this attitude victimizes the honorable students who don't cheat and suffer from comparatively lower grades.

Faculty have a responsibility to penalize or report those who cheat. I hope ChatGPT has made the presence of cheating so obvious that it can't be ignored. Perhaps universities will address the elephant in the room: Student cheating is rampant, and it is the fault of the faculty. It is high time that we base student grades only on work done in proctored environments. This surely will increase faculty workload, but without academic integrity, what do we have?

PROF. JOHN R. SAYLOR  
Clemson University  
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## Bring Back Human Support

Roland Fryer's op-ed is correct in pointing out that increased consumer frustration is due to rising fixed costs and lower discretionary income ("Why Everything Feels More Expensive," May 19). After all, 50 years ago I didn't drink bottled water or eat organic food. Nor did I have monthly bills for cable, fitness centers, cell-phones and the internet.

Some of this consumer frustration may also be the stress associated with a more technological society. Modern technology in the service sector is only cost efficient if it reduces human interaction. But this increases the time burden on those that have to rely on artificial-intelligence call centers for problems with their services.

You can buy your way out of this time burden by paying for such things as healthcare concierge services. But for most of us, we are stuck with automated messages and increasing grief over a person-free service environment.

MICHAEL C. PETROWSKY  
Philadelphia

## CORRECTION

The average annuitant in Washington state's Law Enforcement Officers' and Firefighters' Retirement System Plan 1 draws \$5,413 a month. The May 16 Cross Country column misstated the payment's frequency.

## Free Expression

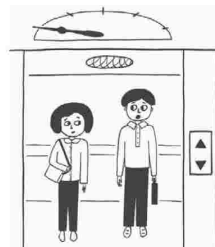
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## Pepper ... And Salt

THE WALL STREET JOURNAL



"I'm here for the music. You?"

OPINION

# History Repeats in Iran



EDITOR AT LARGE  
By Gerard Baker

Let's start with the most important point about the agreement. President Trump is apparently about to sign with Iran. There were no good options. If we're lucky, the deal in the works may restore the status quo ante in the region: shipping lanes reopened, negotiations over Iran's nuclear program resumed—with a regime that has been tactically degraded but looks strategically enhanced.

The worst outcome, in other words, except for all the others. That's what you get when you launch a strategic expedition on a tide of hubris and ignorance, a "little excursion" you insist will end in "four to five weeks" in "the unconditional surrender" of your enemy—an enemy so obdurate that it values its own existence far above the lives of its own people.

It's unfair to blame Mr. Trump alone, because this strategic failure is not new for the U.S. It's also what you get when you embroil yourself in another conflict in the greater Middle East based on a bleakly familiar combination of miscalculations: a massive underestimation of the enemy's defensive capabilities and will to resist, and a massive overestimation of your own offensive capabilities and will to perse-

cute a costly war to a conclusion. So, yes, negotiating the best deal was the right choice. What were the alternatives? Maintain the state of blockade and siege? That would have done greater harm to the U.S. and world economy, with limited chance of success. Return to the bombing campaign? More costly depletion of munitions, jeopardizing our other military commitments, in exchange for repairable damage to Iran's military infrastructure.

Escalation? That might have promised a more conclusive outcome. But how likely was it and at what cost? Blithe exhortations to "finish the job" again underestimate the level of commitment necessary to achieve the stated objectives: opening the sea lanes, depriving Iran of its nuclear capability; degrading its infrastructure so it poses no future threat. All this would have required extended naval warfare against an enemy entrenched in defensive and offensive posture along a 1,000-mile long Gulf littoral, sustained amphibious operations in hostile waters, the deployment of enough ground forces to retrieve remote and well-protected nuclear material, and more forces to ensure the elimination of defensive capabilities.

In short, escalation wouldn't have meant a calibrated ratcheting up of the surgical operation we have been trying to execute for the past three months. It would have meant all-out war against a country with a population larger than Iraq's and Afghanistan's combined, with a military and political leadership dug in to

defend the regime to the last man. Could we have won? Maybe, but not at a cost most Americans would deem acceptable.

It isn't unpatriotic to express skepticism about our ability to fight and win this kind of war. The accusation that voicing criticism of a campaign waged on flawed assumptions and fanciful expectations means rooting for the enemy is repugnant. Iran's regime is one of the most despicable on the planet; it has murdered Americans and threatens regional stability. It deserves to be

## Donald Trump seemed to have learned the lessons of his predecessors. Then he overreached anyway.

ground into dust. But we should be able to debate the best way to defend ourselves from it without being accused of campaigning for the enemy. If Iran emerges from all this stronger, as reasonable critics fear, then those who have so enthusiastically backed all-out war should reflect on their own role rather than attacking those with reasonable doubts.

It is this, after all, that makes America great: that we can debate the wisdom of policy without calling each other traitors; we can call on the wisdom of a wide range of people to develop the right strategy. Above all, we learn our lessons when

we make misjudgments rather than claim we have been stabbed in the back. We know where that leads.

This last point is the biggest irony of all this. Since George H.W. Bush's resounding success in expelling Iraq from Kuwait in 1991, we have been stuck in a repeat pattern of wild oscillations between overconfidence and hypercaution; successive presidencies have ridden a swinging pendulum between hubris and timidity.

Bill Clinton's pusillanimous response to al Qaeda's terrorist attacks on the American embassies in Africa and the USS Cole emboldened our enemies and led more or less directly to the criminal tragedy of Sept. 11, 2001. George W. Bush pushed the pendulum the other way and assumed an easy victory over Iraq in 2003. Barack Obama's diffidence gave us his red-line disaster in Syria in 2013. Joe Biden's shortsighted aversion to even limited military engagement resulted in the calamity of the Afghanistan withdrawal in 2021.

Between those last two, Donald Trump seemed finally to have achieved equilibrium with prudent intervention where necessary while avoiding unnecessary wars.

George Santayana's famous observation about history has been absorbed into the bloodstream of popular culture. We don't learn from it; we are doomed to repeat it. But what are we to make of those who seemed to have learned the lessons and then went and repeated the mistakes anyway?

# Indoor Childhood Is Bad for Kids

By Ben Sasse

The digital revolution is making nearly every aspect of modern life. A top concern of parents, educators and sociologists is screen time. How much is too much? The question points to a larger problem: American children are weirdly held hostage indoors.

In theory, suburban neighborhoods offer the convenience of the city and the space of the country. In practice, it's too often the worst of both worlds. Our mostly suburban nation suffers the atomization of city living and the isolation of rural life. For kids, this means a life lived primarily indoors, sitting still.

## The cultural implications of trapping an entire generation at home with nothing useful to do.

According to a new survey from the Institute for Family Studies, 60% of 6-year-olds have access to internet-connected tablets, but 58% of kids their age aren't allowed to play in their own yards unsupervised. Parents are busy, and they neither can nor should be micro-managers. But when kids can't entertain themselves outside, the screen becomes the babysitter.

Things aren't better for older kids. At 11, 1 in 4 kids aren't allowed outside without adult supervision. More than half of 14-year-olds don't have permission to leave their streets.

This is new. For children trapped in America's industrialized school system, too much of life is defined by passivity. Adolescence should be an exciting coming-of-age period, a gradual transition to adulthood. If we don't give teenagers more responsibility, we're failing to prepare them for the world they'll soon lead.

Nearly two-thirds of 17-year-olds can't leave their neighborhoods without adult supervision. Is it reasonable to expect them to vote at 18? To fight a war? To incur college debt? Is it prudent to expect them to be ready to navigate a turbulent workforce being ripped apart by artificial intelligence? Obviously not.

Rather than introducing children to the world in an age-appropriate manner, we're preventing them from developing imagination, resilience and grit. Allowed to navigate dark corners of the internet on their own, many kids are bizarrely prohibited from exploring their own neighborhoods. This overprotection, however well-meaning, prevents children from learning valuable lessons like overcoming boredom, conquering fear and taking risks.

Of the 12 Apollo astronauts who walked on the moon, 11 were Boy Scouts who had learned to live by the scout's motto: "Be Prepared." We're not raising these kinds of audacious risk-takers at present.

From westward expansion to space exploration, Americans have succeeded by pushing boundaries and embracing challenges. That kind of pioneer spirit starts with the adventures and misadventures of childhood. Stitches aren't all downside.

Rather than complaining about "kids these days" or telling tales of an imagined past when baby boomer and Gen X parents walked to school uphill both ways, Americans need to reckon seriously with the choices we've made and the cultural implications of trapping an entire generation at home with few to no duties.

We've eliminated opportunities for children to learn from low-risk failures and then tossed young adults into the deep end. The fault isn't with kids. The failure belongs to us, their parents.

Policy or legislation isn't the solution, but the problem is solvable. The first step is developing an accurate and shared sense of the challenge. A significant reason for the next generation's addiction to screens is the current generation's failure to give them something better to do. We haven't done the work required to build foundations of responsibility, independence and discovery. As a result, screens become the easy default.

Doing harder things will be more fulfilling. Cultural change starts at home and then moves out to neighborhoods, communities and institutions. If we want to raise stronger, more resilient kids, we need to give them more freedom and demand more responsibility.

Mr. Sasse is a Free Expression columnist at WSJ Opinion. He served as a U.S. senator from Nebraska, 2015-23.

# The Architects of American Renewal

By Robert L. Woodson Sr.

The 250th birthday of the United States presents a unique moment to celebrate beyond flag-waving, anthem-singing and praising the wisdom of the Founding Fathers. Though meaningful, such rituals become empty without moral reflection.

Which victories, exactly, are we celebrating? And what kind of nation are we calling ourselves and our posterity to be?

Over the past decade, American history has been weaponized to convince its people that we are irredeemably defined by our worst chapters—especially the racial darkness of slavery. Black children are increasingly taught to believe they live in a country that fundamentally thinks less of them. White children are told they are inherently guilty because they are "privileged oppressors."

Both messages produce the same outcome: a diminished sense of human value, the erosion of self-respect and collapse of social trust. A people convinced they are powerless will eventually live as though they are. The past should be a teacher, not a jailer. People don't rise when they are taught helplessness. They are motivated to rise when they are shown examples of what is possible.

## Our country still needs leaders who didn't nurse grievances but chose the path of radical grace.

The biblical narrative offers a blueprint for this distinction. The Israelites were commanded never to forget their bondage in Egypt—not so they would remain victims forever, but so they would never become Pharaoh to another people. Memory was meant to sharpen conscience, not keep people permanently wounded.

America must remember its own Egypt in that exact spirit. The evils of slavery should never be forgotten—but neither should they be used as a permanent indictment against the nation. They should serve as a moral guardrail reminding us that greatness is neither inherited nor guaranteed; it must be earned, defended and renewed. Slavery reminds us of the capacity for cruelty within every society and why we must remain humble, vigi-



Clemmie Greenlee

lant and committed to justice.

America was founded on ideals intentionally left unfinished. Its true greatness lies not in claims of perfection, but in its constitutional capacity for self-correction. The painful struggle to live up to those ideals takes courage, self-discipline and, above all, grace. Not the cheap, performative grace of political rhetoric that rationalizes wrongdoing or denies injustice. The costly kind that demands something of you: discipline, sacrifice, responsibility and moral courage. The kind that chooses restoration over revenge even when revenge feels justified.

Radical grace doesn't excuse evil but refuses to let evil define the future. This virtue has always been one of black America's greatest contributions to the nation. Slavery didn't build black resilience. It revealed the strength, faith, ingenuity and perseverance already present in people who refused to let oppression define the limits of their humanity. Out of bondage emerged some of the greatest examples of entrepreneurship, family formation, innovation, moral strength and excellence this country has ever produced.

Even during Jim Crow, flowers grew through the cracks. Radical grace, not victimhood, is the defining thread of black America's story, and it is the model all Americans must recover.

History is filled with examples of this radical grace in action. Consider Robert Smalls, born enslaved in South Carolina. History rightly celebrates the moment in 1862 when he commandeered a Confederate ship and sailed enslaved families to freedom. But his greatest act came later. After emancipation, Smalls purchased

the house of his former enslaver, Henry McKee. Later, as a decorated war hero and U.S. congressman, Smalls cared for McKee's elderly widow, allowing her to live out her final days in the same home where he had once been held in bondage. Smalls refused to let the cruelty of his past dictate the character of his future. That wasn't weakness. That was radical grace.

That same spirit lives today in Clemmie Greenlee of Nashville, Tenn. When her son was murdered 23 years ago, his first instinct was revenge. Pain demanded payment. But standing over her son's casket, she looked up and saw a room overflowing with people from every background whose lives he had touched. In that moment, she realized her son's life wouldn't be defined by how it ended. She chose a path that cuts against the current of our culture. She exchanged grievance for forgiveness. Not instantly. Not easily. But deliberately. Over time, she walked a long road from

rage to restoration through faith and discipline.

This year, Clemmie sat face to face with the man who killed her son. Not to excuse his actions or to erase consequences—a society without consequences cannot survive. But this man had served his sentence. And punishment alone can't heal what is broken. During that meeting, Clemmie learned that while the man was incarcerated, his own mother had died. Loss met loss. Pain recognized pain. And at that moment, something in her broke the cycle of perpetual retaliation. That is what radical grace looks like.

Today, through an organization called Nashville Peacemakers, Clemmie works with young people who are drifting toward violence and incarceration. She is doing what policy debates and government programs often fail to do: rebuilding lives through accountability, discipline, relationship and restorative grace.

Leaders like Clemmie Greenlee are the true architects of America's renewal. Just as Robert Smalls did more than a century ago, they remind us that our darkest hours don't have to define our destiny.

Unfortunately, politicians often undervalue these modern-day patriots because their work can't be reduced to statistics or sound bites. Their efforts require something far more demanding: moral investment.

As America turns 250, the question is whether we still possess the spiritual resources to renew ourselves. Will we continue nursing our grievances, or will we choose the harder path of radical grace? America's future depends on that choice.

Mr. Woodson was founder and president of the Woodson Center and author of "A Pathway to American Renewal: Red, White and Black." He died at 89 on May 19.

# Who Let the Dogs In?

By Bert Stratton

I have a no-dogs policy. I'm a landlord. When I bought the building in Lakewood, Ohio, decades ago, a gigantic Doberman lived in apartment 400. It bounded down the stairs and almost ran me over. Also, the dog stained the oak floors by regularly urinating in the living room.

So I kicked the dog out, and the tenant, and instituted a new policy. (Cats are OK at an additional \$20 a month.)

Yet I do have dogs in the building—"emotional support animals." These aren't trained service animals like those that help the blind. Tenants find a licensed social worker or psychologist to write a letter saying the animal is needed for their mental health. The Fair Housing Amendments Act obligates the landlord to offer "reasonable accommodations" to tenants with disabilities, emotional and otherwise.

Last month a new tenant informed me she has two emotional-support dogs. She brought this up after she had already moved in. She described the dogs as "mixed-breeds, about 20 pounds each." I immediately fantasized about changing my no-dog policy to "second dogs are OK—at \$500 a month." That would solve the pooch

parade. But it would be illegal.

The tenant texted me that Daisy and Mia "are bonded and separating them would cause distress that would negatively impact my condition." The dogs' owner also pointed out: "My apartment is approximately 700 square feet, which is sufficient space for their size and needs." My tenant had done her homework. More than I had. I didn't know you could have two emotional-support dogs in a one-bedroom. How about three dogs?

The tenant said each dog has a unique function: "One assists me with daily functioning and provides support when I leave home, whereas the other helps reduce anxiety and provides a sense of safety and stability within my home environment, particularly following a past traumatic experience."

The tenant works in a restaurant, but everybody is a lawyer on the side, courtesy of AI.

If the dogs aren't quiet, I'll have to file an eviction for "disrupting the neighbors' peaceful enjoyment of the premises." What a hassle.

I'm hoping the dogs are reasonable. The tenant isn't.

Mr. Stratton is author of the blog *Klezmer Guy: Real Music & Real Estate*.

## THE WALL STREET JOURNAL

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OPINION

The Washington Post

AN INDEPENDENT NEWSPAPER

EDITORIALS

This is the reality of European-style social spending



ILLUSTRATION BY YAN WU/THE WASHINGTON POST; ISTOCK

Imagine you're a single American worker earning an average wage. A gold coin represents the total you employer spends to compensate you: about \$79,000.

You don't receive all of it. Government takes a "tax wedge" of about 30 percent.

On your paycheck, this appears as your income tax (\$12,000), employer Social Security contribution (\$6,000) and employee social security contribution (\$6,000). The remainder is your take-home pay.

Americans look longingly at Europe, where many countries have relatively high social spending, and dream of bringing that system to the United States. U.S. politicians, aware of this desire, campaign on two falsehoods.

First, that the U.S. government does not already spend massively on pensions and health care. Second, that the only obstacle to bringing a European-style welfare state to the U.S. is a lack of taxes on the rich.

The reality is more complicated, and growing America's tax wedge brings serious risks in and of itself.

Some of the other wealthy countries in the world do indeed have more robust safety nets than America. Yet they don't rely on narrow taxes on their most wealthy citizens; rather, they're financed by broad levies on the middle class. And as rising defense spending squeezes national budgets, those already high taxes are rising.

Average tax rates on wages rose for the fourth consecutive year across the majority of the 38 countries that make

up the Organization for Economic Co-operation and Development (OECD). An average earner faced a tax burden of 35.1 percent in 2025, the highest level in a decade, according to a recent OECD report.

The leaders of too many OECD countries have overpromised, and now they're targeting income because it's easy to tax and guaranteed to bring in consistent revenue. Some countries have avoided increasing tax rates, but by not adjusting income thresholds to reflect inflation, they drag more workers into higher brackets.

Doing this is not free of consequences. The OECD report finds that the tax wedge grew in 24 countries compared with 2024, contracted in 11 and held steady in three. In 13 of the countries where the tax wedge grew, it was a direct result of a rising personal income tax as a percentage of labor costs.

Of the 11 countries where the tax wedge fell, nine cut their personal income taxes, including Australia, Denmark, Iceland, Ireland, Italy, Latvia, Portugal, Sweden and the United States.

The United Kingdom suffered the largest rise in taxes between 2024 and 2025 after the country increased its jobs tax.

The U.S. helps pull down the OECD average. America's tax wedge is the lowest of all advanced economies in the Group of Seven.

Households with children are squeezed harder than singles on average across the OECD. The difference in the tax wedge for a one-earner household with two children versus a single house-

hold fell to 8.9 percentage points, from a pandemic peak of 10 percentage points in 2021. This shows a reduced tax advantage for families.

The U.S., however, is particularly generous when it comes to fiscal breaks for one-earner families. When an average American family received an extra \$1 in wages, they kept 9.3 cents more of it than a single-earner household did.

But not all parents are treated equally. A single parent with two children in America earning 67 percent of the average wage loses half of any pay raise they get at work due to higher taxes and reduced benefits.

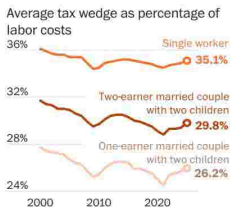
It's also worth noting that about half of federal spending in the U.S. goes to pensions and health care. Despite spending like some European countries, America keeps taxes low by running deficits.

Being the global reserve currency helps hide fundamental problems with this arrangement, but America's relatively low tax regime is not sustainable if politicians don't get sober about spending. The U.S. national debt, over \$39 trillion, has surpassed 100 percent of gross domestic product, an ignominious milestone.

The spending addiction risks undercutting the rewards of economic policies that America is getting right. Last year, real wages rose 1.2 percent and post-tax income rose 4 percent. In simple terms, this means Americans are earning and keeping more of their own money.

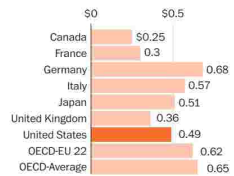
Economic growth can help alleviate fiscal pressures, and lower tax rates lead to higher growth.

The tax wedge for a single worker reached its highest level in a decade



For low-income single parents, a raise pays less than expected

After a \$1 increase in gross labor costs, how much reaches a single parent with two children earning two-thirds of the average wage, after higher taxes and reduced benefits?



Source: OECD Taxing Wages 2026

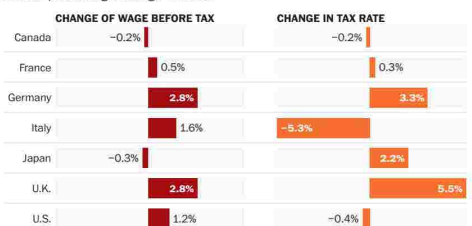
In 9 of 11 OECD countries with a declining tax wedge, the drop was driven by lower income taxes

Percentage point change from 2024 to 2025



Americans' wages increased as average tax rates declined

Annual percentage change in 2025



Change of wage is adjusted for inflation. Tax rate is based on the personal average tax rate of the average worker (single without children).

MICHAEL RAMIREZ



LETTERS TO THE EDITOR

Data centers should consider impacts to rural communities

The May 15 editorial "The right response to the data center backlash" argued that the United States must accelerate data center construction to remain competitive in the artificial intelligence race. That is true. AI is reshaping industries, national security and the economy. But farmers and ranchers are not opposing the technology. They are asking legitimate questions about property rights, water usage, power reliability, utility costs and whether local residents will have a meaningful voice in decisions that permanently reshape their communities.

Rural America has powered this country for generations. It produces the food, fuel and fiber that sustain the economy, while hosting pipelines, transmission lines and other infrastructure projects. But if the backbone of the AI economy is to be built in rural communities, those communities deserve transparency and a seat at the table before decisions are made, not after.

Missouri Farm Bureau members have expressed concerns about how massive data center demand could affect electrical reliability and affordability. As the editorial noted, residential electricity prices are expected to rise 5 percent nationally in 2026, on top of an 11.5 percent increase in 2025. These are exactly the kinds of issues state and local policymakers and regulators are supposed to evaluate carefully before approving projects of this scale. This outcry led us to propose the language that became the national policy on data centers for the American Farm Bureau Federation.

The United States can absolutely lead the world in AI innovation while also respecting private property rights, local decision-making and the communities helping power that growth.

The choice should not be between innovation and protecting rural communities. We can, and must, do both.

Garrett Hawkins, Appleton City, Missouri The writer is the president of the Missouri Farm Bureau.

I am the executive director of the Interstate Commission on the Potomac River Basin, the agency designated by Congress for the "integration and coordination of the planning for the development and use of the water" in the Potomac River watershed.

The ICPRB is neither for nor against data centers. Nonetheless, we do believe that decision-makers and the public need more data on data centers. D.C. and Arlington are the two most vulnerable cities in the U.S. to a cutoff of their drinking water because they have only one source of water (the Potomac River) and only a one-day backup supply. Should an extreme drought occur in 2050, an ICPRB study indicates, "serious water supply shortages are likely unless additional resources are added to the system."

Though national data suggest data centers account for a small portion of U.S. freshwater use, such averages obscure intense local and regional stress. The ICPRB projects that by 2050, data center water use in the D.C. area will increase to approximately 22 million gallons per day on average and more than 80 million at summer peak use.

Data centers should address the lack of transparency surrounding water use and water quality implications. Nondisclosure agreements hamper agencies, such as ours, from accessing site-specific water demands. Virginia's recently enacted bill requiring specified water users to report monthly volumes of potable and reclaimed water supplied to data centers and other users is a welcome first step. So is Maryland's legislation requiring an analysis of the likely environmental, energy and economic impacts of data center development in the state.

In short, the right response to the data center backlash is better transparency and more vigilance regarding water consumption.

Michael Nardolilli, Arlington

Business-friendly states will dominate AI

Regarding the May 2 editorial "Seattle's mayor waves goodbye to prosperity": For years, Americans have been voting with their feet, leaving costly, heavily regulated states for places that prioritize growth, investment and opportunity.

That's because Americans support lawmakers who let our free-market system work as intended, like those in Texas, where innovation is rewarded through reasonable regulation, a competitive tax climate and a willingness to quickly adapt to new industries.

Data centers are the latest opportunity for business-friendly states to dominate. They make the digital world possible by powering the most promising technologies, such as data storage, cloud computing and artificial intelligence. Data centers represent tax revenue, job creation and economic growth.

Advancing AI doesn't mean ignoring the risks, such as data privacy and energy use, but rather taking a targeted approach to enacting safeguards that address risk while still fostering growth and innovation.

Legislation such as Texas's Responsible AI Governance Act reinforces existing consumer protections and AI development while the Trump administration works with Congress to enact its national AI legislative framework. The framework outlines a plan for AI development that includes important safeguards protecting intellectual property and free speech while still prioritizing American AI innovation and dominance.

We must allow the market to flourish freely.

Kevin Brady, The Woodlands, Texas The writer, a Republican, is a former congressman from Texas. He is also an adviser to Americans for Free Markets.

## OPINION



The Strait of Hormuz off the port city of Khasab, Oman, on May 17.

DAVID IGNATIUS

## Trump's Iran exit ramp is a risky bet. He doesn't have a better option.

President Donald Trump appears to be negotiating an escape ramp from the Iran war, but it's one that represents a risky bet that Tehran's divided leadership will opt for postwar modernization rather than continuing conflict with the United States and Israel.

Like most peace deals, the framework described by U.S. officials Sunday would be a series of compromises, well short of the capitulation that Trump sought when he joined Israel in launching the war on Feb. 28. The Iranian regime can claim victory simply by having survived the assault. If these hard-line leaders continue to destabilize the region, however, the deal will probably collapse in another round of strife.

The ceasefire agreement outlined to me Sunday by several knowledgeable officials focuses on several headline items: Iranian agreement to reopen the Strait of Hormuz immediately, without tolls, and an Iranian pledge not to seek nuclear weapons — in exchange for cessation of hostilities, release of frozen funds and gradual removal of U.S. sanctions.

The details of Iran's deenuclearization would be negotiated over the next 60 days, in a process that's fuzzy at best. Iran is said to have agreed to dispose of its stockpile of highly enriched uranium but hasn't yet accepted Trump's demand that the material be delivered to the West. This problem could be finessed by a plan to dilute the enriched uranium or ship it to a third country, if Trump agrees. The International Atomic Energy Agency would verify compliance.

Trump's baseline is that Iranian leaders "must understand... that they cannot develop or procure a Nuclear Weapon or Bomb," as he put it in a Truth Social post Sunday. But the devil is in the details. Iran hasn't publicly agreed to give up its "right to enrich," and after this war, its desire for a nuclear deterrent will probably be as strong as ever.

To gain Iranian compliance during the 60-day

negotiation over nuclear details, the U.S. has proposed performance-based incentives — "you get more if you give more" is the phrase officials use. Over the 60 days, the U.S. will remove economic sanctions gradually if Iran complies. But it will reimpose them — to the point of choking the economy — if it resists.

Trump and his advisers appear to have decided that resuming kinetic action to enforce harsher terms isn't worth the big downside risk to the global economy and Trump's political fortunes. But his move to end the blockade worries Israel and its supporters in Congress, such as Sen. Lindsey Graham (R-South Carolina). Trump sought to ease concern with his post Sunday that he would not "rush into a deal."

The Trump team believes that global energy prices will decline quickly once the Strait of Hormuz reopens. One official said the ships now stranded in the Persian Gulf are carrying 150 million barrels of oil; as that oil heads to market, prices will ease, the official predicted. Of the 20 million barrels that moved daily through the strait before the war, the official said, alternative means of delivery have been found for all but 7 million barrels. Others have less rosy predictions about how fast the global energy market will recover.

One fascinating aspect of the negotiations is that the Trump team has been playing what amounts to a game of thrones with the fragmented elements of Iran's new leadership. They've reached out to a range of Iranian officials, including some senior members of the Islamic Revolutionary Guard Corps, using contacts developed by key intermediaries, especially Qatar, Turkey, Saudi Arabia, the United Arab Emirates and Pakistan.

The Trump team's pitch has focused on the economic opportunities that would follow a settlement. The prize for the mullahs, they have argued, is significant postwar investment in Iran's battered but

potentially prosperous economy. "Act like a normal country, and you will be treated like one" has been part of the negotiating mantra. Negotiators have explained that investors will demand rule of law, predictable policies and stable governance before committing capital.

This vision of a modern, prosperous country would delight most Iranians. But it's anathema to many hard-liners, who since 1979 have feared that modernization will undermine the revolution. The mullahs worry about "cultural contamination" from the West that will weaken Islamic values. But they must reckon with a war-weary population that's eager to move Iran toward the glittering cityscapes of Saudi Arabia and the UAE.

Looking back on three months of war and blockade, what's astonishing is how little clarity Israel and the United States had about how to help the Iranian people create this modern, post-revolutionary state. When tens of thousands of Iranians were in the streets in January denouncing the regime, Trump promised that help was on the way.

But it arrived Feb. 28 with decapitation strikes, a half-baked plan to arm Kurdish rebels and a loony idea to install Mahmoud Ahmadinejad, a hard-line former president, as the agent of change. That path to regime change, never realistic, collapsed as the regime slaughtered thousands of the January protesters.

If Trump gets a peace agreement, he will have escaped what had become a military morass and a strategic dead end. As one source involved in war planning put it, "We have the capability to bomb anything. But what can we do that will change Iranian decision-making?"

The bet that triumphal IRGC cadres and their regime allies will join in building a modern state is a long shot. But Trump doesn't appear to have any better options available.

MAX BOOT

## Netanyahu's effort to remake the Middle East is backfiring

First of all let us rid ourselves of the foolish error that with the Army alone we can maintain the security of the State," warned Israel's first prime minister, David Ben-Gurion, in 1951. "Security rests on a foreign policy of peace: a sincere intention to be at peace with our neighbors, and with all the nations."

Israel's current prime minister, Benjamin Netanyahu, once heeded his predecessor's warning. Though Netanyahu was always a hawk, he was a cautious one. He undermined the Oslo Accords; he did not abandon them. In the past, when he waged wars, they were short ones, designed to "mow the grass," not to eradicate the lawn. His most significant achievement was the 2020 Abraham Accords, establishing formal diplomatic relations with several Arab states, and he aspired to extend that rapprochement to Saudi Arabia.

All of that changed on Oct. 7, 2023, when a Hamas terrorist attack resulted in the worst single-day loss of Jewish lives since the Holocaust. Israelis were traumatized and radicalized to seek absolute security and total vengeance. Since then, Israel has undertaken military action in the Gaza Strip, the West Bank, Lebanon, Syria, Iran, Iraq and Yemen. Instead of seeking to deter and degrade Israel's enemies, Netanyahu has talked of "obliterating" them. He has vowed to change "the face of the Middle East" and to "redraw" the map of the region.

Netanyahu's desire to lash out in all directions after such a devastating sneak attack — Israel's version of 9/11 — is perfectly understandable, but it is backfiring. In pursuit of absolute security, he is undermining Israel's long-term interests. He is over-extending Israel's military and turning the state into a global pariah. He is also making Israel more dependent than ever on U.S. protection even as his country's unpopularity in America rises.

Israel's continuing conflict with Iran shows how difficult it is for such a small state, even when working hand in glove with a superpower, to achieve its objectives. Last June, after 12 days of airstrikes against Iran, Netanyahu proclaimed "a historic victory, which will stand for generations."

*In violation of the old Zionist mantra of self-reliance, 'We will defend ourselves by ourselves,' he has made Israel dangerously dependent on the United States.*

Yet only eight months later, he led Israel, in league with America, into another, far more ambitious conflict with Iran. This one was designed to destroy its nuclear and missile programs and to change its regime. None of those objectives has been achieved, and Iran has responded by closing the Strait of Hormuz.

Netanyahu lobbied for the war, but he has lost control of it. His ally, President Donald Trump, has sidelined Netanyahu from peace negotiations and tries to humiliate the proud prime minister by saying, "He'll do whatever I want him to do." Last month, Trump forced Israel to accept a ceasefire in Lebanon that Netanyahu plainly did not want. A new U.S.-Iran deal is likely to bring a reprise.

Yet Netanyahu has no choice but to grin and bear it because — in violation of the old Zionist mantra of self-reliance — "We will defend ourselves by ourselves" — he has made Israel dangerously dependent on the United States.

The Post last week reported that the U.S. military expended "far more high-end munitions defending Israel amid hostilities with Iran than Israeli forces used themselves." The article quoted an administration official as saying, "Israel is not capable of fighting and winning wars on its own, but nobody actually knows this, because they never see the back end."

That's a big, long-term problem in Israel, because its support in the U.S. is cratering, partly because of rising antisemitism but also because of all the negative reporting about civilian casualties in Gaza.

## AI doesn't need a regulator, it needs a referee

BY SAM LICCARDO

Thursday's announcement that the Trump administration will delay its executive order on increased government scrutiny of artificial intelligence models provides a breather in its whiplash-inducing approach to the technology. The administration first proposed penalizing states with AI safety regulations without any federal substitute. Then it suggested a federal vetting scheme that would prohibit the release of models deemed unsafe, only to quickly backtrack. Meanwhile, as the Pentagon purged Anthropic's model from its computers, the National Security Agency installed it in its classified networks. Whew.

A well-functioning legislature — if we had one — would lend statutory order to this chaos. And it could do so without stunting development of American AI with excessive regulation that would hand China the keys to the 21st century.

Legislating on matters of technology doesn't come naturally to Congress, however. The body has urgently deliberated measures to protect children from online harms since the late 1990s, for example. Those children now have their own (unprotected) children. Discussion on Capitol Hill has focused on how federal regulation might mitigate the many risks posed by AI's rapidly expanding use, from the common — such as discriminatory bias or privacy violations — to the catastrophic, such as disseminating blueprints for making biological weapons. Yet the conversation has largely missed a central problem: *We can't regulate it.*

That is, traditional regulation won't contain AI's risks effectively. The functional obscurity of AI neural networks, often described as the problem of "interpretability," limits the efficacy of AI testing and assessment. While the AI labs can mitigate some risks by manipulating algorithms, model weights and training data, they cannot predict or explain every outcome. Well-intended regulators might mandate guardrails to prevent an AI agent from, say, emptying millions of bank accounts, yet a sophisticated criminal, often aided by AI, can induce a model to "jailbreak," and a rogue AI agent could autonomously introduce its own perils.

*A regulator proactively establishes a set of safety rules. A referee, by contrast, evaluates the state of play and determines which products are safest. A referee would leverage the two primordial motivations of every hyper-scaler: crushing their competitors and avoiding liability.*

Don't expect Congress to legislate these risks away. Several colleagues have proposed good first steps, such as enacting federal equivalents to requirements approved in California for frontier model developers to publish safety protocols, independent evaluations and testing results. But those modest regulations should not make us sleep much better, given the limited liability of model testing.

There's a better approach to governmental intervention: not to regulate, but to referee.

A regulator proactively establishes a set of safety rules and requires that a product or service satisfy them to access U.S. markets. A referee, by contrast, evaluates the state of play in an industry and determines which products are safest. Those safest competitors set the standard by which all market participants obtain the referee's benefit or sanction.

An AI referee would incentivize a "race to the top" for AI safety by leveraging the two primordial motivations of every hyper-scaler: crushing their competitors and avoiding liability. Every AI lab increasingly struggles to navigate a minefield of potentially conflicting AI safety laws from 50 states. But if safer AI design entitles a model's developer to avoid that liability thicket, it could gain a decisive regulatory advantage over less safe competitors.

I am introducing a bill to empower the Commerce Department's Center for AI Standards and Innovation (CAISI) to define the industry's best safety practices within any specified category of risk, and to identify which frontier models have achieved those best practices. Companies' AI models earn federal preemption — a safe harbor from liability under state law for a specific category of risk — if they meet or exceed CAISI's determination of industry best practices for cybersecurity, human safety, privacy and the like.

This approach appears better suited for a fast-evolving technology than a fixed safety regulatory standard. As competitive incentives push developers to improve model safety, CAISI would raise its bar to reflect the newest best practices. Any legislation must also ensure CAISI has strong whistleblower protections, of course, and fire walls on political influence — particularly under this administration — to support agency integrity.

Other agencies would stay in their lanes. Public wariness will continue to spur state governors and legislators to get tough on AI hyper-scalers, so the impetus will grow for companies to meet CAISI's safety thresholds for preemption. Companies that use AI — such as mutual fund managers, pharmaceutical manufacturers or banks — would remain subject to the same outcomes-focused regulations under the Securities and Exchange Commission, Food and Drug Administration or Federal Deposit Insurance Corporation, regardless of what tools they use.

This approach does not eliminate AI risk. No law will. It acknowledges, though, that the absence of a Delphic oracle, we need to learn much more about model testing and evaluation before we can regulate risk effectively. In the meantime, our best hope lies in clear rules that strongly incentivize the private sector to do what the government cannot: make AI safer.

Sam Liccardo, a Democrat, represents California's 16th district in the U.S. House of Representatives.

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## EDITORIALS

### Can Grogan rebuild the Illinois GOP in the suburbs?

After years of infighting, ideological warfare and organizational atrophy, Illinois Republicans appear to be betting on a different model: coalition building over purity tests, precinct organizing over political theatrics and suburban recovery over grievance politics.

"You can't purge your way to 51%," new Illinois Republican Chairman Bob Grogan told us over the phone Thursday.

He went on: "Fratricide isn't a good campaign strategy."

Republican State Central Committee members on May 18 voted out Kathy Salvi after roughly two years at the party's helm in favor of Grogan, an accountant, former DuPage County auditor and a lifelong resident of the collar counties Republicans once dominated politically.

Grogan, who served as DuPage County auditor from 2008 to 2020, is no stranger to rooting out waste, fraud and abuse, almost a prerequisite for anyone who wants to take on Springfield's many challenges. Some may remember Grogan from his 2014 primary campaign for state treasurer against longtime Illinois Republican politician Tom Cross, a race Grogan lost before Cross himself lost the general election to Democrat Michael Frerichs.

Yet Grogan comes off today as more of a tenacious underdog than one might expect to meet in today's GOP. First and foremost, he told us, he wants to present a positive message. Among his many catchphrases, Grogan shared a vision that's at odds with what's playing in Washington.

"You can't grow the church by excommunicating all the sinners," he said.

Something must be in the water, because that's the tone GOP gubernatorial candidate Darren Bailey of downstate Xenia is



Then-Republican candidate for Illinois treasurer, DuPage County Auditor Bob Grogan, meets with the Chicago Tribune Editorial Board in 2014. MICHAEL TERCHA/CHICAGO TRIBUNE

taking this time around, too. Bailey, a Republican who had trouble ginning up support here in Chicagoland when he last ran for governor in 2022, is doing his level best to right past wrongs. He even came before the City Council on May 20 to apologize formally for calling our city a "hellhole" in his previous gubernatorial campaign.

Can a kinder, friendlier GOP work? Not on its own, and adjusting the party's tone and tent are not the only things Grogan aims to change about the tired party structure.

He also pointed out the obvious: Illinois Republicans need to focus on getting out the vote.

"We haven't failed in a very short period of time, we've had failures over a long period of time," he said.

He's not wrong there. After former Gov. Bruce Rauner — temporarily the GOP's largest benefactor and anchor — picked up his ball and went home, the party became rudderless.

The Rauner void led to competing factions, overlapping power centers and deep internal discord. While we respect Republicans like state Rep. Ryan Spain of Peoria and House Republican Leader Tony McCombe of Savanna, others within the party have gone to the fringes alongside many of their national counterparts.

While outgoing Chair Kathy Salvi has been praised for her fundraising abilities, the party remains disorganized and has been unable to assemble and execute adequate GOTV strategies. Republican turnout tells the

story. The four GOP gubernatorial candidates this year combined had about 560,000 primary votes — nearly 230,000 fewer than Republicans cast in the 2022 gubernatorial primary, and far below even the low-turnout 2014 contest won by Rauner.

While many tend to view the ticket top-down, Grogan said he sees things in a more bottom-up way.

If Republicans think Salvi's best skill set was fundraising, Grogan says his is his ground game. For Grogan, "ground game" means rebuilding the Republican Party as a neighborhood-level organization again — training volunteers, strengthening precinct operations, coordinating county groups and creating a durable turnout machine instead of relying on

personalities and TV ads.

It also helps that he's from DuPage, formerly a Republican stronghold where the GOP has atrophied and needs to build back up. That means running candidates in all races, no excuses. While Republicans this primary season had a crowded gubernatorial race, down the ticket Republicans have done a spottier job of making sure Democrats face a challenger.

That's part of what frustrates would-be Republican voters here, especially because Illinois is a land of political opportunity for anyone with a solid plan to make a go of it.

First, there's money here. Ahead of the 2024 election, President Donald Trump and affiliated super PACs raised over \$30 million out of Illinois.

Second, it's not as if Democrats are wildly popular. Illinois Democrats control the Statehouse and the governor's mansion, and preside over years of fiscal mismanagement and an unwillingness to face up to our state's biggest problems, though they aren't as shy about turning to taxpayers for more revenue. And while it's likely Gov. JB Pritzker will win reelection in November, his most recent victory wasn't exactly a sweeping mandate — he didn't even crack 55% of the vote. All that to say, Illinois is ripe for a commonsense voice to come in and challenge our state's one-party rule.

"If it takes a long time to screw things up, it'll take a long time to make things right," Grogan said. He has less than six months until the November general election to make his mark, but the new Republican chairman's legacy will extend far beyond this fall.

Moderate voters and Republican donors need a reason to invest in the state party. Grogan's task is to give them one.

### Hold the deep-dish and pass the BBQ. Kansas City is hosting Chicago's World Cup party

FIFA wanted a centrally located U.S. city with transit, hotels, soccer fans and an NFL-sized stadium. Chicago fit the profile but chose not to pursue hosting duties, leaving Kansas City to claim the Midwest spotlight instead.

We've discussed our issues with that problematic decision before. And when this page checked in with Kansas City, we heard no regrets from the Plains of the Plains about signing the deal that Chicago had every opportunity to make its own.

At this month's IPW international travel conference, where Illinois' tourism promoters were reminding people repeatedly about Route 66 turning 100, Kansas City was touting the big event that will make headlines around the world this summer.

"The city's ready," Devin Aaron, spokesman for Visit KC, told us. "This is the biggest thing Kansas City has ever hosted, and we want to knock it out of the park."

Kansas City sold itself as America's most enthusiastic soccer capital, and the hype has become self-fulfilling. National teams from England, Argentina, the Netherlands and Algeria, packed with glamorous star players, picked the Kansas City area over more populous cities for their "base camps."

These homes-away-from-home pair a team with a designated training facility and secure hotel, putting Kansas City in a global spotlight. Kansas City hopes its free viewing festival will become one of the tournament's marquee fan experiences. New York and other host cities will have to work

to outdo what some city slickers might dismiss as a cow town.

Kansas City has invested for years in soccer facilities, but it has limitations. A couple of hundred extra buses are being called into service to compensate for weak public transit. Hotels in some cases jacked up rates beyond reason, then complained when ticket holders booked rooms in surrounding communities instead. Ticket prices have been sky-high, though in some cases lower in the resale market. Federal officials have put up money for security and transit improvements at host cities, but the amounts so far have been relatively modest.

The biggest concern has nothing to do with Kansas City. Among foreign soccer fans who want to attend U.S. games, word has spread that a nightmare may await

because of harsh travel policies from President Donald Trump's administration.

U.S. Customs and Border Protection, for instance, has proposed reviewing the social-media and extended-family backgrounds of foreign visitors. The president's travel bans, meantime, have targeted soccer-crazed countries across Africa and the Middle East.

At the IPW travel conference, special presidential envoy Nick Adams said, "There's nothing I've said in the past that is harmful," even as he bashed the concerns of potential foreign visitors as "total and utter nonsense" and "myths." All foreign tourists need to do, he said, is "follow our rules, follow our laws, and you'll be welcome."

Foreign travel to the U.S. has declined since Trump's second

term began last year, though many of the losses stem from one country. The president offended Canadians by attacking them in his trade wars and describing their country as a potential 51st state. Travel to the U.S. from Canada plunged 22% last year, according to the U.S. Travel Association, whose leader, Geoff Freeman, admits, "We've got work to do to re-earn their trust and let them know America wants them."

At least Kansas City wants them, and other soccer fans from abroad. We're also hoping that Chicago's many soccer fans, recently rewarded with the news of a privately funded stadium in the works for the Chicago Fire soccer team, will get to safely enjoy the games despite needing to head out of town to experience them.

#### ON THIS DAY 6 YEARS AGO: LIVE VIDEO FROM THE SUPREME COURT

The U.S. Supreme Court has been making history lately, and not by the usual method of issuing decisions in important constitutional cases. The coronavirus pandemic has prompted the justices to break with tradition in some big ways.

The first was to hear oral arguments remotely, so that they and the contending lawyers don't have to travel to the courtroom in Washington, D.C. Like many other people who once worked in offices, the justices have been doing their jobs from home. ...

The first case, heard on May 4, was a trademark dispute involving the travel website Bookings.com. The justices and lawyers called in to the teleconference and the business unfolded more or less as usual. The marble columns at the building's main entrance did not crumble from the shock waves — despite one embarrassing moment when a toilet was heard flushing. Let's all pretend "the flush heard around the country" as a CNN headline dubbed it, never happened, shall we?

The new format did make a difference. Instead of jumping in helter-skelter to interrupt the attorneys and one another, the justices politely took turns asking questions. The more orderly proceedings induced Clarence Thomas, who sometimes goes years without speaking at these sessions, to ask several questions.

The justices also approved another change: allowing the live broadcast of oral arguments. ... This, however, was the first time that Americans could hear cases argued live. ...

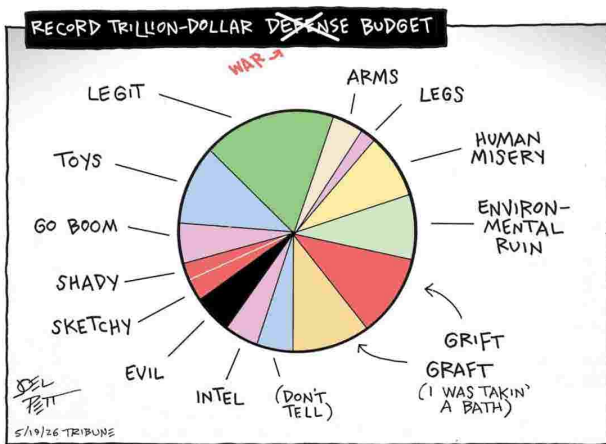
Maybe it will encourage the court to give Americans an even better picture of its work by admitting video cameras, as soon as the court goes back to hearing cases in person. If hearing is good, seeing and hearing is better. ...

We think the court as well as the public would benefit from the greater understanding that would come from letting ordinary people watch arguments as they happen. ...

Maybe the experience with live audio will make the justices realize that there is nothing to fear from video. The work they do is a vital part of our system of government, and every American should have the opportunity to see how they do it.

Tribune editorial board, May 26, 2020

#### EDITORIAL CARTOON



JOEL PETT

# Dark money is winning as political parties face an identity crisis

By Jim Nowlan  
SPECIAL TO THE TRIBUNE

American political party organizations have imploded in the post-World War II era, largely replaced by dark money from unknown donors. The party vacuum is ominous for a healthy democracy, because voters are left without stable cues about how to vote. There are options that could — it won't be easy — strengthen parties and diminish the impact of dark money.

The traditional political party has four roles: establish and promote a platform; recruit candidates to seek election on that platform; conduct campaigns to elect those preferred candidates; and, once elected, pursue the platform objectives inside government.

In his 1971 book "The Party's Over," prominent political writer David Broder declared that "the governmental system is not working because the political parties are not working." In the half century since, parties have weakened further. For example, in my state, the formal Illinois Republican Party no longer fulfills any of the traditional party roles.

Parties have been declining over the decades as control of nominations to office — the most critical role of parties — has shifted from party leaders to party primaries. And now in California primaries, candidates of both major parties are on the same ballot. The California approach basically ignores the role of parties, and a party may end up without a candidate on the general election ballot.

This transition to more openness would appear to favor democracy, that is, power to the people — from the Greek "demos," meaning "people" and "kratos," meaning "power." The overall effect is the opposite, however, as most voters approach elections with at best modest knowledge of the issues and candidates. It has always been so, and thus the rationale for political parties — to provide clueless voters cues to help them in their voting decisions.

For most of the 20th century, the Democratic Party stood for the working class and the Republicans for business. Simple, but helpful to the voter. After all, the basic conflict in human history has been that between labor and



An American flag flying near the Washington Monument is seen split nearly in two on June 12, 2018. SARAH SILBIGER/CQ ROLL CALL

capital. A voter unattached to either party could determine how things in society were going under the party in power and vote for the other party if he or she wasn't happy with the economy.

Today, the Democratic Party message is garbled, at best, as different factions vie for leadership. The Republican Party, now a captive of President Donald Trump, has no clear message; it has a willful leader who suppresses party identification to that of himself.

As a result, according to a 2025 Gallup poll, almost half of American voters (45%) now identify with neither party.

Political party organizations, as well as voting in America, are typically broken down into precinct units of about 1,000 registered voters. Post-World War II, precinct posts were generally filled with local party activists,

and there were frequent contests for committeeperson or captain.

Today, party officials have to plead, often unsuccessfully, with party identifiers to fill the roles. Citizens interested in politics more often give their loyalty to candidates or elected officials, who build their own candidate-centered, rather than party, organizations.

With party organizations unable or unwilling to mount campaigns on behalf of their preferred candidates, money has filled the vacuum. This money often comes into campaigns in big chunks from independent super political action committees that hide their donors' names from disclosure. The money goes primarily for advertising, largely on social media, with messages that are more and more tailored to the individual voter.

As a result, voters are adrift in an echo chamber of babble. This

confuses and distresses voters, many of whom tune out and stay away from the polls. Since democracy thrives on active citizen support and participation, our political system suffers. The confusion can induce some voters to support candidates who trumpet simple fixes to complex problems.

There are options that could reinvigorate parties and diminish the impact of money in politics:

Create a new political party or parties, just as Abraham Lincoln and associates created the new Republican Party in the early 1850s, supplanting the Whig Party. The two present major parties have never been more vulnerable to challenge.

I am surprised, for example, that former Republican U.S. Rep. Adam Kinzinger, a bitter opponent of Trump, has not transformed his Country First

advocacy group into a political party. As Theodore Roosevelt said, the credit belongs to those who are in the arena.

Further, bring the light of day to dark money donors and make their money toxic. Cast megabucks in campaigns as the issue; oppose candidates who benefit from dark money. Voters are offended by big money that seeks to manipulate them.

The party is over. Create a new political party or parties, just as Abraham Lincoln and associates created the new

Republican Party in the early 1850s, supplanting the Whig Party. The two present major parties have never been more vulnerable to challenge. I am surprised, for example, that former Republican U.S. Rep. Adam Kinzinger, a bitter opponent of Trump, has not transformed his Country First

## Illinois is at an energy crossroads, and time is running out

By Dan R. Brouillette  
SPECIAL TO THE TRIBUNE

Illinois is at an energy crossroads. The decisions made in Springfield over the next few years will determine whether Illinois families enjoy reliable, affordable power or pay more for a system that delivers less of it.

A decade ago, Illinois was an energy powerhouse. The state produced more electricity than it consumed and exported the surplus across the region. Today, that advantage is being legislated away.

In December, state regulators released a resource adequacy report that should have stopped Springfield in its tracks: Northern Illinois could face energy shortfalls as soon as 2029, with the rest of the state to follow by 2031 under current policy. That is flashing red light, and policymakers should treat it as one.

Instead, Springfield is doubling down. Current policy phases out coal and natural gas baseload, the workhorses of the grid, and replaces them with intermittent generation and ratepayer-subsidized alternatives. The goal may be well intentioned, but the execution is deeply flawed.

Reliable energy is not built on aspiration. It is built on physics, fuel and steel in the ground.

Wind and solar play an important role, but they are intermittent by design and a grid built on intermittency needs either a partner that can run on demand or a customer base that doesn't mind the lights going out.

To paper over that gap, lawmakers turned to battery storage. Last fall, the General Assembly approved an \$8 billion battery buildout financed by Illinois ratepayers. Batteries are useful, but they are not generation. The very best of those technologies can only address short-term fluctuations. Suggesting they can replace a gas or nuclear plant that runs for days, weeks or years at a stretch is wishful thinking dressed up as a news release.

The signal to existing generators is unambiguous: Your time is up. By 2030, the Climate and Equi-



A wind farm in McLean County on May 7, 2024. E. JASON WAMBSGANS/CHICAGO TRIBUNE

table Jobs Act will force the retirement of roughly 12 gigawatts of dispatchable thermal capacity in northern Illinois. The previously mentioned resource adequacy report projects that ComEd will flip from electricity exporter to importer in those years, with annual power costs rising from \$2.1 billion to \$3.9 billion.

Generators are already reading the signal. At Elwood Energy in Will County, two-thirds of the plant, roughly 900 megawatts, are being dismantled and shipped to Texas, the Tribune Editorial Board reported. For Illinois, that means fewer jobs, less investment, less tax base and one more hole in the supply curve. Capital follows certainty, and policy hostility produces exits.

The market is already pricing the consequences. PJM Inter-

connection, the regional grid operator that serves northern Illinois, sets a portion of every ComEd bill through its annual capacity auction. In December, that auction hit the federal price cap of \$333.44 per megawatt-day, more than 10 times the 2023 price of \$28.92, and even at the cap, it fell 6,600 megawatts short of the region's reliability requirement, the first such shortfall in PJM's history. ComEd customers absorbed a 20% to 25% supply rate increase in June 2025, with another already set for this June.

That is not a forecast. That is a bill in the mail.

Demand, meanwhile, is going in the opposite direction. Northern Illinois expects electricity demand to rise roughly 24% by 2030, driven largely by artificial intelligence and the data

centers powering it, and those data centers drove nearly 94% of the year-over-year increase in PJM's 2027-28 peak load forecast. Illinois should compete hard for those investments, but the question is whether the grid can serve them. Illinois cannot win the AI race on a grid that is being deliberately weakened.

California offers a preview. After years of retiring dispatchable generation for intermittent supply, the state now lives with rolling blackouts and emergency conservation orders and has among the highest electricity prices in the country. Illinois is not there yet, but it is on the road that leads there.

This is a choice, not a fate. Illinois has the resources, the workforce, the nuclear fleet, the gas infrastructure and the geography

to build a balanced portfolio that protects climate and consumer at once. That is energy expansion, not energy retreat: molecules and electrons working together, with renewables where they fit, gas for reliability, nuclear for baseload, and storage where it earns its place.

A grid does not care about good intentions. It cares about megawatts.

Illinois lawmakers can keep prioritizing ideology over reliability and hope the system holds, or they can choose a path that protects ratepayers, attracts investment and keeps the lights on. The choice is clear, and the clock is running.

Dan Brouillette was U.S. secretary of energy from 2019 to 2021 and is co-chair of the consultancy Torrion Group.

## OPINION

# The Pentagon is blending the war on drugs with counterterrorism. It isn't working



Daniel DePetris

On May 16, the United States found and killed Abu-Bilal al-Minuki, a top Islamic State commander, in Nigeria. The precision operation in the northeast of Africa's most populous country came about a week after President Donald Trump's administration released its new counterterrorism strategy.

As one might expect, combating the Islamic State and al-Qaida, the usual suspects for Washington's vast counterterrorism apparatus, is treated as a top priority in the 16-page document. What's more notable is the strategy's focus on the drug cartels and smaller criminal groups that have proliferated in the Western Hemisphere. In both words and deeds, Washington is elevating Mexico's drug trafficking organizations and Ecuador's gangs to the same plane as the Islamic State gunmen who roam the Syrian desert. In doing so, Trump has expanded the war on terrorism to encompass the war on drugs.

"We will not let cartels, jihadists, or the governments who support them plot against our citizens with impunity," Trump wrote in the report's introduction. "Terrorists of any kind will not be allowed to find safe harbor here at home or attack us from abroad."

The Trump administration has made good on this threat by increasing the U.S. military's role in the counter-drug fight. In September, the Pentagon announced Operation Southern Spear, a series of U.S. strikes against boats in the Caribbean and Eastern Pacific that allegedly were carrying drugs to the United States. According to the latest tally by The New York Times, the U.S. has conducted a total of 57 strikes, killing approximately 200 people in the process. Trump alleges, falsely, that the strikes have reduced seaboard drug trafficking into the U.S. by an astounding



The remains of what appeared to be a working dairy farm burned and bombed by the Ecuadorian army, as part of a campaign aimed at drug cartels, in Sucumb'os, Ecuador, on March 13. Authorities are using drones, troops and AI to crack down on cocaine smuggling, but gangs are finding new ways to move record amounts of drugs across the world. **FEDERICO RIOS/THE NEW YORK TIMES**

97%.

Washington has sought to regionalize this military-centric framing as well. In March, officials from 17 Latin American states traveled to Miami for the Americas Counter Cartel Conference and signed a joint declaration establishing a multinational coalition against the region's trafficking groups. The effort was a logical outgrowth of the Trump administration's designation last year of nearly two dozen Latin American cartels and gangs as foreign terrorist organizations.

Ecuador, which has become one of the most dangerous countries in the Western Hemisphere thanks to drug gangs, is now a testing ground for the Trump administration's militarized approach. Since March, U.S. special operations forces have been advising and enabling the Ecuadorian military as it seeks to disrupt trafficking routes along the Pacific coastline and capture high-profile gang

leaders.

As much as the White House would like to claim vindication, Washington's blending of the war on drugs with the war on terrorism is not actually having a positive impact. By fusing the two, the United States is embarking on another long-term military engagement whose overall goal — eliminating the drug trade — is fanciful at best.

Signs of success are few and far between. While the Pentagon makes a show on its social media feeds of purported drug boats exploding on the high seas, it's hard to believe that Whac-A-Mole in the Caribbean and Pacific will substantially reduce the amount of drugs reaching the United States.

In the seven months before the U.S. boat strikes commenced, nearly 38,000 pounds of cocaine were seized by U.S. Customs and Border Protection. In the seven months since the boat strikes,

Border Patrol agents seized slightly more than 44,000 pounds. In brief, the strikes are failing to stem drug trafficking into the U.S. and military pressure is not altering the traffickers' strategic calculus as the White House anticipated.

Instead, the traffickers' employers are merely changing their routes and pricing in hope of a financial windfall. Even Gen. Francis Donovan, the top U.S. military commander in the region, told Congress that hitting low-level drug dealers on boats isn't the answer to the nation's drug problem.

Is U.S. military involvement in Ecuador producing better results? It depends on how you define success. For Ecuadorian President Daniel Noboa, the Trump administration's anti-cartel strategy is a net benefit because it supports his own domestic efforts against the country's gang network. In Noboa's estimation, homicides in

Ecuador declined by 28% from February to March. This suggests Washington's train-and-assist mission is helping the Ecuadorian army's plan-and-execute operations in parts of the country that were previously off-limits.

Yet for the United States, stopping the flow of drugs, not reducing Ecuador's murder rate, is the principal objective. Trump is hoping to degrade and disrupt the criminal outfits to the point in which Ecuador is no longer among the main transit routes through which cocaine reaches the U.S. market.

However, such a goal will require a sustained military effort on Washington's part over a long period of time. And even if this feat were accomplished, eventually, the long-term effect on the drug trade would likely be marginal. Traffickers undoubtedly would adapt as they have in the past by switching to another route. There is no shortage of routes in Latin America, in part due to the systemic corruption and insufficient state capacity that plague much of the region.

Fortunately, it's not too late to change course. A better U.S. strategy should start with a fundamental premise: Cartels are not terrorist groups, and treating them as such will create more problems than it solves. Those problems could come in the form of more civilian casualties with a loosening of the rules of engagement and investment in a militarized approach; more draconian security policies overall, including states of emergency and due process limitations; a securitization of the public sphere; and greater alienation between the state and the people they're supposed to protect. This alienation will, in turn, be exploited by the very cartels the Trump administration aims to fight.

Without a basic shift in outlook, Washington's anti-drug approach abroad will remain flashy — but ultimately ineffective.

Daniel DePetris is a fellow at Defense Priorities and a foreign affairs columnist for the Chicago Tribune.

## Voice of the People

### Budget hole not due to Trump

The op-ed written by state Reps. Nicole Grasse and Kevin John Olickal and state Sen. Rachel Ventura ("Donald Trump's cuts broke Illinois' budget. It's time to make the wealthy pay to fix it," May 19) is more of the same blather from Democrats showing they think that just throwing a pile of money at a problem will solve the problem. They blame the state's financial mess on President Donald Trump and "wealthy individuals" and say that the solution is simply taxing the rich. The real cause apparently slipped their minds.

They forgot about the exorbitant public union pensions the Democrats created and continue to feed. Someone should remind them that Illinois has the largest underfunded pension liability in the nation even as Illinois public unions demand more and do their best to misinform. The budget hole they cite was not caused by any president. It was caused by Illinois politicians and the public unions that bought them.

There are plenty of working families whose members are not in a public union. Accountants, salespeople, architects, restaurant owners and engineers like me pay for our own healthcare and retirement plans. We work just as hard, pay the same high taxes, have less job security and face the same struggles as any public union employee, but we are still on the hook for the pension mess, with no end in sight.

A lot of us working people are tired of paying for someone else's retirement. There is no way we should trust the Illinois General Assembly with more tax money until we are assured it will benefit all of us and not just the public unions.

So if the General Assembly wants us to vote to increase taxes, lawmakers should let us vote on public pension reform at the same time. I agree that everyone should pay their fair share. That includes the public unions.

—John Kavouris, Naperville

### Tie tax changes to cuts

In the op-ed written by three Democratic state lawmakers, they write of the damage to state of Illinois finances from changes by President Donald Trump's administration. They recommend changes to Illinois taxing



The Illinois State Capitol on Feb. 18 in Springfield.

**BRIAN CASSELLA/CHICAGO TRIBUNE**

that could potentially offset these changes, but not until the end do they mention waste, and they give that very short shrift — no specifics at all. Just that they "support" eliminating it.

As with Gov. JB Pritzker's plan for a graduated income tax a few years back, I can't support any tax changes unless they are tied to roughly equivalent spending reforms.

It's more than just waste; there is a ton of redundancy that can be reduced. Get to work, lawmakers.

—Matt Foster, Orland Park

### Time to end public pensions

In response to the op-ed by state lawmakers, I'd like to remind readers that our state has long been broke. Some \$144 billion in debt was long ago created by politicians because of public pensions. Public pension enhancements do not have to be offered in contract talks. Politicians simply could say no.

This debt is among the major causes of higher taxes. Public pensions are unaffordable, corrupt and unsustainable, and it's long past time to end them.

—Jack Kraus, owner, PTR Truck Center, West Chicago

### Public funds for public schools

The editorial advocating for Gov. JB Pritzker to emulate New York's approval of the federal tax credit scholarship program overlooks a fundamental principle of civic responsibility: Public funds should remain within public schools ("NY governor signals she'll OK federal tax credit scholarships. Gov. JB Pritzker now has

cover to do the same," May 13).

The argument that tax credits offer a "cover" for Illinois disregards the state's primary responsibility — to provide a high-quality, equitable education for all children, not just those who can access the private system. By using tax credits to incentivize private school donations, we effectively divert potential revenue from the very institutions that serve the majority of our students.

Public schools are more than just classrooms; they are the foundation of our communities. They are legally obligated to serve every child, regardless of children's background, ability or disability, or academic standing — a standard that private institutions are not required to uphold. Weakening the financial foundation of these schools undermines the future of Illinois.

While individuals can support low-income students through private scholarships, true philanthropy should exist outside the public sphere. Private generosity should not be subsidized by public funds at the expense of our collective well-being.

Pritzker should remain committed to fully funding the evidence-based funding formula for our public school districts. Let's ensure that public dollars are allocated where they can have the most significant impact on the most children: in our public schools.

—Stephen Hogan, Westmont

### Let's lead in climate action

According to a recent report by an international panel of climate

scientists, the worst-case climate scenario has been revised downward. The new upper-end estimate projects about 3.5 degrees Celsius, or 6.3 degrees Fahrenheit, of warming by the year 2100, rather than 4.5 degrees Celsius.

What is rarely discussed is that the increase in global heating is expected to continue beyond the end of the century.

According to the Intergovernmental Panel on Climate Change, "Limiting global mean temperature increase at any level requires global CO2 emissions to become net zero at some point in the future."

This means reducing carbon dioxide emissions enough that they are balanced by CO2 removal, such as being absorbed by forests and dissolved in the oceans. Otherwise, the concentration of carbon dioxide in the atmosphere will continue to grow.

Disturbingly, the earth has already warmed to the point that, instead of absorbing and storing carbon dioxide, the planet's carbon sinks are becoming sources of CO2 emissions. Warmer oceans are less able to take up carbon dioxide. Moreover, permafrost is thawing, and forests are burning.

Imagine if the Roman Empire had possessed the power to irrevocably harm much of the life on earth, yet limited its concern for sustainability to just a few generations.

Reducing greenhouse gas emissions, protecting forests and wetlands because of their ability to store carbon, and funding adaptation are among humanity's greatest moral obligations. Even small changes in the trajectory of Earth's warming could mean better lives for decades for millions of people.

As the world's largest cumulative emitter and its most powerful nation, the United States has a responsibility to lead in addressing the climate crisis.

—Terry Hansen, Grafton, Wisconsin

### Benefits of solar farms

The May 13 Daily Southtown report on the Will County zoning commission's rejection of the Pride of the Prairie solar project

again reflects a lack of perspective among opponents of renewable energy ("Will County Board votes 12-8 to approve sprawling Pride of the Prairie solar farm"). Claims that solar farms lower property values, damage watersheds and industrialize valuable farmland are based on hyperbole rather than facts.

Solar fields can make good neighbors because they do not generate a lot of noise or traffic, they do not emit hazardous materials that could contaminate groundwater, and they don't emit odors. With a profile that is usually no taller than a single-story building, solar fields can be hidden behind trees and other vegetation. The Will County project would add 600 megawatts to the grid, enough to power 110,000 homes, and contribute \$3.5 million annually to the tax base, the lion's share going to schools.

As for land use, a Princeton University report estimated that clean energy will require about 10 million acres of land for solar farms and wind turbines, compared to the 38 million acres in use in the U.S. to grow crops for corn-based ethanol and biodiesel, which still contribute harmful emissions to the air we breathe, and 39 million acres devoted to parking lots and roadways.

Do they bring down home values? Not necessarily. Data from home sales in 2024 near a solar farm and data center in Urbana, Illinois, showed increases of 35% to nearly 50% over a five-year period, according to a solar farm developer in DeKalb County.

When solar projects come to town, public comments are vital to understanding the impacts, but the 22-member Will County Executive Board should base its decision on facts, not innuendo.

—Joe Tedino, Chicago

### Note to readers

We'd like to hear from CTA riders about what frustrates you about the CTA as well as what you're grateful for. (Six cents thoughts only.) Send a letter by Thursday, May 28 of no more than 400 words to letters@chicagotribune.com. Be sure to include your full name and city/town.

For online-exclusive letters, go to [www.chicagotribune.com/letters](http://www.chicagotribune.com/letters). Email your letter submissions, 400 words or less, to [letters@chicagotribune.com](mailto:letters@chicagotribune.com). Include your full name, address and phone number.