

Editorial



Danger from above

Natural outbursts in hilly terrain are rising amid climate change

Disaster struck Nepal on Wednesday after a flash flood ravaged the Himalayas and foothills. As of Thursday, at least 359 people including several foreign tourists, had died, while at least 300 Indians remained missing. Satellite imagery analysed by global agencies, including the Indian Space Research Organisation, points to a glacier collapse or ice-rock avalanche in Tibet, possibly followed by a temporary river blockage and its sudden failure. An earthquake was initially suspected, but evidence has not borne it out. While the immediate flood wave has passed, there are warnings of possible secondary flooding from debris blockages upstream. There has been extensive damage along the Bhote Koshi and Trishuli corridors, with settlements washed away and hydropower and monitoring infrastructure damaged. Nepalese authorities said 35 motorable and 45 suspension bridges and about 40 kilometres of roads had been damaged.

Given that it is the monsoon, north India and the larger Himalayan regions are under the influence of a powerful Western Disturbance. It would thus not have been unreasonable to attribute the floods to these extratropical storms that can cause clouds to collide with mountains and release enormous quantities of rain at short notice. But the ubiquity of satellites is helping establish a more complex picture, pointing to collapsing glaciers and recalling the October 2023 South Lhonak Lake disaster in Sikkim. There, an eponymous Himalayan glacier suddenly gave way, releasing millions of tonnes of water, debris and rock that pulverised Sikkim’s largest hydropower project. Subsequent analysis showed that the resulting Glacial Lake Outburst Flood (GLOF) had been years in the making. The Indian Himalayas have nearly 7,500 glacial lakes and about 15,000 glaciers, some monitored through remote sensing. Yet, fully assessing their condition requires site visits, difficult because these lakes lie in inhospitable terrain while expeditions are generally feasible only from July to September. Even with satellite monitoring, accurately forecasting a glacier collapse remains exceedingly difficult – and can be counterproductive if warnings trigger panic among residents who, often because of habit or lack of alternatives, are unlikely to move out of harm’s way. Dams and hydropower projects in such terrain are often among the first casualties of these natural outbursts, which are increasing amid global warming. Beyond relief and rescue, governments must enforce construction codes, discourage settlements and large projects in known vulnerable zones, and invest in better tracking of glacier health. Such monitoring can feed long-term disaster planning into development programmes. A tragedy is frequently not the result of a conspiracy but the product of passive neglect; the latter can be addressed.

New-age fires

Fire accidents in ICUs need better and more evacuation facilities

Not too long ago, India’s fire accidents typically occurred in industrial facilities, large offices, mass gatherings, firecracker units and railway compartments, caused by faulty machinery, weak safety procedures and careless use of flammable materials. While these risks persist, what has got added to the country’s poor record in fire safety in the last 15 years or so is residential buildings, hotels and hospitals, especially Intensive Care Units (ICU). Electrical fires now seem predominant, often caused by increased appliance use, overloaded electrical systems and poor maintenance. ICUs are especially vulnerable with their oxygen-rich environments. This month, back-to-back accidents at neonatal ICUs in Amravati, Maharashtra, and Chhindwara, Madhya Pradesh, claimed the most vulnerable: newborn babies. The Amravati fire was put out in 30 minutes, but the smoke was too much for the three babies admitted because of complications. A faulty ventilator is suspected to be the cause. In the NICU at Chhindwara District Hospital, a short circuit in a warmer triggered a fire and three babies, just days old, suffered burns. Over the past 15 years, ICU fires, including the one in Jhansi in 2024, in which 18 newborns died, have not served as a wake-up call. The Amravati fire shared many features with previous incidents.

Perhaps the best way to respond to these new-age fires would be to treat ICU accidents as a distinct category. ICUs are sealed compartments where smoke fills up very quickly. In an NICU, where patients cannot self-evacuate, evacuation drills are essential. A best-case setup would have three independent exits, with at least two allowing horizontal evacuation, automatic sprinklers, independent power lines for large equipment, oxygen cylinder bed supports, and fire drills every two years. A well-designed ICU also locates oxygen outlets away from sockets. Following a Delhi NICU fire, the National Neonatology Forum called for mandatory fire safety certification for NICU-equipped hospitals, regular power audits, analogue addressable alarms, and an evacuation protocol – now RACE or Rescue, Alarm, Confine, Extinguish/Evacuate. The 2026 National Guidelines on Fire and Life Safety in Healthcare Facilities can be a useful starting point for ICU-NICU safety. Beyond all this lies an issue in power quality: electrical harmonics. NICU equipment is packed with electronic components that draw distorted current, which can silently overheat neutral wiring, transformers, and loose connections without tripping a breaker. Post-fire reports citing generic “short circuits” or “technical faults” may well be missing this harmonic-driven degradation, a largely unaudited risk factor.

Days after both Houses of Parliament were adjourned *sine die* on August 13, 2026, the monsoon session has yet to be formally prorogued. The delay has prompted speculation that Parliament could be reconvened for another attempt at the constitutional amendment linked to delimitation and women’s reservation. Whether or not that happens, it gives urgency to a question Parliament must confront: must delimitation necessarily mean an enlargement of the Lok Sabha?

Numbers alone cannot decide

At first glance, the issue looks like arithmetic. India’s population has grown enormously since Lok Sabha seats were frozen half a century ago, so it seems natural to argue that representation must now expand correspondingly. But, constitutional design is not arithmetic alone.

Article 81 requires representation broadly to correspond to population, “so far as practicable”, while Article 82 provides for readjustment after every Census. Yet, Parliament has twice modified the mechanical application of this principle when another compelling national objective was at stake. In 1976, through the 42nd Constitutional Amendment, the inter-State allocation of seats was frozen on the basis of the 1971 Census so that States successful in family planning were not politically penalised for reducing population growth. The freeze was later extended by the 84th Amendment until the publication of figures from the first Census conducted after 2026. Parliament thus recognised that population matters, but it is not the only constitutional value at stake.

The government has reportedly suggested increasing every State’s representation by roughly 50%, arguing that this would leave each with the same ‘proportion’ of Lok Sabha seats that it has today. On the face of it, that appears to answer the fear of the southern States of losing their relative position. But ‘proportion’ tells only half the story.

Suppose Uttar Pradesh rises from 80 seats to 120, while Tamil Nadu rises from 39 to about 59. Their proportional relationship remains unchanged. Yet, the absolute gap in voting strength rises from 41 Members of Parliament (MP) to around 61. Parliament does not vote in proportions; it votes in absolute numbers. Governments are formed by numbers, and confidence motions, legislation, and constitutional amendments are decided by numbers. A 50% pro-rata increase may preserve the ratio while widening the numerical gap.

The 1976 freeze therefore embodied a federal compact: States that succeeded in population stabilisation would not see their political voice diminished for doing what national policy encouraged. That understanding should not now be thoughtlessly discarded.

There is also a misconception that delimitation and enlargement are inseparable. They are not. India has already shown that constituency boundaries can be redrawn without changing the



S.Y. Quraishi

Former Chief Election Commissioner of India and the author of ‘An Undocumented Wonder – The Making of the Great Indian Election’

Delimitation, federal fairness and women’s representation can all be achieved without enlarging the Lok Sabha

number of seats allocated to each State. The delimitation after the 2001 Census reorganised constituencies within States while maintaining the existing inter-State allocation.

That principle can be adopted again. The 2027 Census can provide the basis for redrawing constituencies within each State so that populations are more evenly distributed. Boundaries can reflect demographic movement and urbanisation. None of this requires increasing the Lok Sabha beyond 543 or disturbing the present federal balance.

A continuously expanding legislature is also not an inevitable consequence of population growth. The United States House of Representatives has remained at 435 voting members (there were some temporary exceptions) for more than a century despite enormous population growth. Switzerland’s National Council has remained at 200 members since 1963. Going a step further, Hungary reduced its Parliament from 386 members to 199, while Italy reduced its Chamber of Deputies from 630 to 400. There is no democratic law requiring legislatures to grow whenever population grows.

Bigger House, weaker deliberation

There is another serious concern: what a larger House does to Parliament’s own functioning. Parliamentary time does not expand with the number of MPs. Even with 543 members, many MPs hardly get opportunities to speak, ask questions or raise matters of public importance. A Lok Sabha enlarged by 50%, to more than 800 members, would reduce those opportunities further. It may increase representation numerically while weakening the quality of deliberation, one of Parliament’s most important functions. Indian MPs already represent the largest average constituencies among the world’s major democracies – several times the size of a U.S. congressional district or a U.K. constituency. Freezing the House at 543 while the population keeps growing means that burden only increases after delimitation, and the case for more representatives to improve accessibility is a real one. But it does not follow that the additional representatives must sit in Parliament. Most citizens approach elected representatives over roads, schools, hospitals, local services and State administration - matters substantially within the State sphere. If population growth has made constituencies unwieldy, strengthening representation at the State level is, therefore, a more sensible solution. More MLAs and smaller Assembly constituencies can bring representatives closer to citizens without continuously enlarging the national legislature.

That expansion faces none of the federal-arithmetic constraint that makes Lok Sabha expansion fraught. A larger Assembly shifts no balance between States – each answers only to its own population. Vidhan Sabhas can therefore grow to meet accessibility needs without disturbing the inter-State balance in Parliament that the 1976 freeze was designed to protect. Then comes women’s reservation.

India’s return to its Central Asian neighbourhood

Prime Minister Narendra Modi is set to travel to Central Asia in the next few days, the first port of call being a state visit to Uzbekistan, followed by participation in the meeting of Heads of State of the Shanghai Cooperation Organization (SCO) in the Kyrgyz capital, Bishkek, called Frunze in Soviet times. The change of names is not just symbolic. It represents the birth of a new region.

Central Asia is an evocative moniker. The region lies landlocked, situated between two giants, Russia and China. In most of its countries, the post 1991 generation has largely taken over, engaged in finding a new internal equilibrium. Islam is the main religion, but does not define identity and is therefore not a political project. The fight against radicalisation and terrorism is uncompromising. Occasional catastrophes such as the devastating Crocus City Hall terror attack in Moscow in 2024, China’s constant fear of spread of radicalisation in the border regions and export of instability and extremist ideology from Afghanistan are everyday reminders of the challenges.

In Central Asia, there are a multitude of ethnicities, languages, geographies and resource endowments. These influence domestic and foreign policy choices, with Turkmenistan practising rigorous neutrality. Relations among countries are complicated by legacy disputes over borders, water resources and overlapping ethnicities. Türkiye and Iran are dominant influences, while the United States and the European Union are working their way in as Russia’s hold weakens and China’s grows.

Mr. Modi’s 2015 visit to all five Central Asian countries was historic. It marked the end of an unstated Indian policy of deferring to Russia in its periphery – politely keeping away. In 2017, India was welcomed into the SCO as a full member by Russia, as Pakistan was, by China. To mark the 30 years of their independence/diplomatic ties, India



Pankaj Saran

Former Deputy National Security Adviser, Ambassador and Convenor, NatStrat

The Prime Minister’s visit is an opportunity for India to deepen its strategic presence, expand economic ties and strengthen its diplomatic influence

made an unprecedented gesture of inviting all Central Asian leaders as chief guests for the Republic Day in 2022. The COVID-19 pandemic forced the event to be held only virtually, but not without it leading to the creation of high-level mechanisms for cooperation, including the India-Central Asia Dialogue.

Beyond geography

If South Asia and West Asia, not to speak of East Asia and the Indian Ocean Region are India’s neighbourhoods, Central Asia is no less. A lack of overland connectivity does not take away from the civilisational links India has with the region – in culture, religion, language and architecture. Geographically, India and Tajikistan are separated only by the narrow Wakhan corridor that lies in Afghanistan. India is part of the continuum that is the Eurasian landmass.

Pakistan, a historically new piece in the equation, seeks to usurp the historical lineage based on religious affinity. Its tactic to cut India off, physically and otherwise, from these historical connections, like its other India-centric gambits, is, as anecdotal evidence shows, doomed to failure. Yet, India must not allow this to succeed. Countries of the region are today looking beyond Russia and China for partners in their socio-economic development. India’s lived experience as a plural, moderate and democratic society is admired not feared in the region.

It is against this background that Mr. Modi’s decision to go back to the region must be welcomed. India should build upon the foundations to consolidate its rightful place in the region, whether in the economic, trade, defence, natural resources, technology spheres or in softer areas such as cultural, educational, health and tourism exchanges. The choice of a state visit to Uzbekistan is consistent with the steady improvement of relations under President Mirziyoyev since 2016. It is among the most

One-third reservation for women is now being connected with delimitation, and enlargement of the Lok Sabha is presented partly as a way of accommodating women without disturbing existing political interests.

But women’s representation should not become a constitutional justification for enlarging the House. One-third of the present Lok Sabha is approximately 181 seats. Women can receive their constitutionally promised representation within the existing House of 543. The purpose of reservation is to alter who occupies parliamentary seats, not necessarily to create hundreds of additional ones.

A 50% expansion could produce a curious result: the number of women MPs would rise, which is desirable, but so would the numerical dominance of the already larger States. A reform intended to correct one representational imbalance could deepen another. Women’s representation and federal fairness are both legitimate constitutional objectives. India need not choose between them.

Preserve 543, undertake reforms

The solution is simple: retain the Lok Sabha at 543; preserve the present inter-State distribution of seats; undertake delimitation within States on updated population figures; implement women’s reservation within that structure; and expand the Vidhan Sabhas to absorb the accessibility pressure that population growth has created.

For half a century, States have pursued demographic policies knowing that successful population stabilisation would not reduce their parliamentary influence. Southern States in particular invested heavily in education, health care and family welfare and achieved fertility levels that national policy itself encouraged. To reward that success with a larger political advantage for States where population grew faster would invert the incentive the Union deliberately created.

The question, therefore, is not whether population should matter. Of course it should. The question is whether it should now mechanically rearrange the federal political balance that India consciously preserved for five decades. Twice before, Parliament amended the constitutional framework to preserve the existing inter-State allocation despite population changes. There is no reason it cannot do so a third time. The uncertainty over whether Parliament may be recalled makes this more than an academic debate. Decisions taken now could shape the federal balance of the Republic for decades.

Delimitation is necessary. Women’s representation is overdue. Updated constituency boundaries are desirable. But none of these objectives requires an 800-plus-member Lok Sabha.

Sometimes constitutional wisdom lies not in making institutions larger, but in preserving the balance that has allowed them to endure; 543 has served India for more than half a century. There is a strong constitutional, federal and democratic case for letting this number remain 543.

dynamic countries of the region, and most forward in the diversification of its foreign policy. Any Indian visitor to Tashkent, Samarkand or Bukhara will vouch for the empathy and resonance between the two peoples.

There are also hardnosed reasons – Uzbekistan has been uncompromising in its fight against terrorism and extremism. Its intimate knowledge of Afghanistan, and pragmatic approach towards the Taliban, are of key importance to India. India has had detailed discussions with it on alternative rail and road connectivity routes through Iran and Afghanistan which need to be revisited in the light of recent developments in these countries.

India and the SCO

Starting from the small beginnings of the “Shanghai Five” in 1996, the SCO, in its 25th anniversary, has grown to 10 members, 15 dialogue partners and two observers. With the exception of 2024, Mr. Modi has been a regular participant in SCO Heads of States meetings. India’s SCO engagement is driven by geography, not ideology. Within the SCO chambers, negotiating against a China-Pakistan dyad is demanding but essential. India has kept its head above the swamp by suggesting several ideas to enhance cooperation in the economic, technological and civilisational fields. In Tianjin last year, Mr. Modi put forward the vision of security, connectivity, and opportunity for the SCO. In the instant case, for a country as overwhelmingly dependent on China as Kyrgyzstan, the SCO, and India in particular, offers a valuable geopolitical lifeline.

Taken together with his visits to the Indian Ocean Region last month, Mr. Modi would have traversed far-flung corners of India’s maritime and continental neighbourhood in quick succession reflecting India’s geostrategic imperatives and opportunities.

LETTERS TO THE EDITOR

A Himalayan disaster

Two major factors behind the Nepal disaster are its mountainous terrain and the intensity of the cloudburst or the melting of glaciers in the higher Himalayan ranges. The steep slopes would have

allowed gushing water to reach the plains quickly; they can also become death traps for those caught in sudden downstream flows. While the media is still trying to assess the toll, it is certain to run into the thousands. This particular

disaster is unprecedented in the scale of its destruction, with hundreds of villages and small towns wiped out. It is truly heartbreaking. V. Lakshmanan, Tirupur, Tamil Nadu

Post-disaster relief is no

longer enough. It is most essential that Himalayan nations must collaborate on joint early-warning networks, real-time data sharing, and resilient infrastructure. Kshirasagara Balaji Rao, Hyderabad

Revive cultural institution Tamil Nadu’s apex cultural body, the Eyal Isai Nataka Mandram, is inactive, while the Kalaimamani State awards remain suspended. The TVK government should revive the institution, reconstitute its

executive/general councils, and reform the awards process by separating classical arts from cinema. V.P. Dhananjayan, Chennai

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



Apoorvanand

Professor in the Hindi department of the University of Delhi



Ganesh Devy

Former professor of English and the man behind the People's Linguistic Survey of India project

PARLEY

The Supreme Court has been discussing linguistics this month while hearing challenges to the CBSE's three-language formula, which mandates that two of the three languages must be native Indian languages, a category that does not include English. The top court had wondered whether it was correct to treat English as a "non-indigenous" language, given its long history in the country, and its role as a link language in governance and higher education. So should English be considered a foreign language in India? Apoorvanand and Ganesh Devy discuss the question in a conversation moderated by Priscilla Jebaraj.

Is English a foreign language in India?

Apoorvanand: No. It came from outside the geography that we define as India now. But it has been Indianised. We cannot now say that English is foreign to the soil because it's being used in different forms and for different purposes by people across India.

Ganesh Devy: Hindi and English are born of the same Indo-European language family. One part of that family came to us 3,500 years ago; that was Sanskrit and one of the descendants of Sanskrit is Hindi. Another part came through Europe 400 years ago, in the 17th century. So, they both belong to the same root language, and both of them have come to us at different times.

In fact, the only major indigenous language in India is Tamil as it does not come from outside. But for that reason, we cannot impose Tamil on all students. Similarly, we cannot impose English or Hindi. So in India, the language question cannot simply be seen in terms of which is foreign, which is indigenous.

The history of English in India includes both imperialism and the freedom movement, Macaulay and Gandhi. How has this complicated the issue?

GD: Macaulay's minute is relatively recent, dated 1835; the East India Company had started using English in India almost 230 years before that. The interaction between English and other languages started in the 17th century and intensified during the 18th century. In the 19th century, the English governors in Calcutta, Bombay, and Madras insisted on teaching children in native languages, that is, the regional languages. Elphinstone very clearly gave written instructions to teach children in Gujarati and Marathi in the Bombay presidency. But by 1835, the East India Company was thinking of how to bring in legislation to replace Persian, which had been kind of a national language connecting India for several centuries, and that is when Macaulay came in.

AP: English came as a language of traders and



A semi-open class in a school in New Delhi on January 24. R.V. MOORTHY

missionaries and gradually became the language of the administration and the state, but then it also became the language of education. We see an elite being formed through English and also the formation of nationalism or nationalist ideas through English. So that's a very complex journey. We cannot treat English as a simple imposition on Indians. Indians adopted it, domesticated it, and then used it against those who had colonised India. Then, it became a language of liberation for many communities who did not have access to education or knowledge for generations.

English has become the language of aspiration and status. How does that impact social and political dynamics?

GD: The creation of an English-speaking elite has to be seen in the historical context of an earlier experience, where Sanskrit had formed an elite which brought in the *varna* system. The English language created an elite in India who tried to change that system and make India a modern society. Moreover, in India, in order to get a good job one often needs to migrate outside one's State. And as soon as migration is involved, the need for English is enhanced.

AP: English is connected with social mobility as well as geographical mobility. No other language gives you this advantage.

According to the 2011 Census, 10% of the Indian population speak English, and the numbers are only increasing. Has this resulted in the suppression of other Indian languages or has it spread multilingualism?

AP: It would be very simplistic to make a direct cause and effect relationship, because multi-linguality is a feature of India and there are different reasons for which people use different languages at different levels. In my Delhi classroom, the students are largely from the so-called Hindi belt. But for most of them, their home or street language is actually Bhojpuri or Braj or Avadhi or Maithili. So there are many languages which live side-by-side,



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APOORVANAND

performing different functions.

Being a teacher of Hindi, I regret that Hindi is in fact erasing many languages, which had a very rich tradition and which are living languages such as Maithali or Braj or Avadhi or Dondari or even Adivasi languages, because the state is not investing in them. They have now become oral languages, pushed to the margins, while all attention goes to Hindi. It's Hindi imperialism in Hindi areas; Hindi is a coloniser.

What is the impact of the rise of English as well as Hindi on other languages?

GD: First, let me say that the Census of India is not at all a clear mirror as far as language is concerned. For example, if a language is spoken by less than 10,000 persons, the Census says it is not a language. Then, if you look at how many individuals are studying in universities in India, the total figure at any given time in the last 10 years would be about four crore. Each one of them know English as a second language because English is the language of higher education, and yet the Census does not reflect those figures.

Hindi has been gulping other languages. In the Census itself, some 56 other languages are included as subsets of Hindi. There is a language called Pawri which is spoken by the Pawra Adivasi community, on the border of Maharashtra and Madhya Pradesh, who do not understand Hindi at all. Yet that is shown as a subset of Hindi. It is the same with Tamil, Kannada and Marathi. All smaller languages are being shown as subsets of larger languages and that comes from the state's desire to have some kind of linguistic unity.

India is made of many languages and that is the fundamental truth. Just last week, in Maharashtra, rickshaw drivers and taxi drivers were on strike because there is a compulsion that they have to pass an examination in Marathi, based on grammar. Why would a taxi driver need Marathi grammar? He has functional Marathi. Indians speak a lot of functional languages. They speak English, not as the British do, but as a functional language. They speak Hindi all over India as a functional language. And I think we should never forsake the beauty of having multiple functional languages in our pocket, in our hearts, and in our brains.

But there is also a vested interest in English in India from English language publishers and English medium schools. They bat for the continuance of English partly out of commercial

interest. I don't agree with that.

AP: On the CBSE and their stress on a three-language formula, and the insistence of policymakers that they want children to learn the mother tongue – all this is farcical because people know that all these policymakers are sending their own children to English medium schools and that English is social capital, cultural capital, and capital in real terms.

There's also a significant amount of Indian literature written in English today, including works in translation. And of course, films and the Internet freely mix languages. How does that change the debate?

GD: In the 6th, 7th, and 8th centuries, many Indians produced books in Sanskrit. Then, in the 15th and 16th centuries, India was producing more books in Persian. Today, India is producing more books in English than they produce in England. But our desi languages have still survived.

So the production of books, movies, and songs in a certain language is not necessarily an indication of a profound fundamental cultural shift. There are just two small questions to be asked to anybody who is writing English fiction or non-fiction. The first is, when that person goes into any spiritual space, is their prayer also in English? The second question is, is the audience only Indian or is it a global audience? The answers to these two questions will reveal the exact significance of the shift.

By the way, the English came here and had an impact on many things. But Indian music remains Indian music. We have internalised but not replaced. So, our cultural reception of English culture has been calibrated, granular, and is not wholesale as in Australia, U.S. or in Canada where native cultures were wiped out.

AP: I would disagree with that. For example, in my daughter's generation or the generation after, their first love in music is through English and not "Indian music". I don't see any problem in that and I don't see them as culturally uprooted. Would we say that this young generation or those bands which sing only in English are not culturally Indian? It's a very complex concept and the whole anxiety about maintaining nativity and creating a difference between what is indigenous and what is foreign is also problematic. Therefore, I would like to argue that English has made India its home. Those who want to declare that it's a foreign language, in fact, want to hide the fact that Hindi colonises other languages and so do Tamil and other languages, when you create these as meta languages and others as sub languages.



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NOTEBOOK

Rajinikanth, a secret Chennai park, and a Gandhi impersonator

Stories don't always begin with pitches; sometimes, they can emerge from unexpected gates and casual strolls

Srinivasa Ramanujam

The best stories in journalism are not necessarily the ones that begin with a strong pitch, or take hours of research and painstaking reporting; sometimes, they are the ones that a reporter simply discovers along the way.

Recently, I challenged myself to find the place where actor Rajinikanth had shot his first film, *Apoorva Raagangal*, in 1975. Tamil cinema fans will remember the iconic shot of the newcomer pushing open a gate and striding into a house – almost as if announcing his arrival in filmdom.

I was determined to find this gate and the house.

Armed with a few clues from old-timers, I managed to find it at a dead-end street in a quiet Adyar neighbourhood. The gate had changed, but the house was spectacularly intact, almost exactly as it had appeared in the old Tamil film starring Rajinikanth and Kamal Haasan. We spoke to the owners and shot a video in which I mimicked the way Rajinikanth strode in, standing at the exact same place.

Story done, I was ready to head out when I chanced upon a small gate on the opposite side. It looked like the entrance to a park, but seemed deserted. Curious, I walked in, only to discover a walk-through park along the Adyar river. It was one of the most beautiful sights I had seen in Chennai, a city I have lived in for over four decades.

In some strange way, the wooded trail and quiet pathway felt like they belonged to me. Ever since this discovery, I've dragged along all my favourite people to experience it and take a stroll. I wrote about it too, while refusing to divulge the exact location lest it become too crowded.

Another time, a visit to a popular landmark led me to a story I wasn't looking for.

On a boring weekend afternoon, after a Sunday nap, my daughter pestered me to take her out. We decided to head to the Marina Beach for some fresh air and to try our hand at balloon shooting. As we strolled towards the sea, something odd caught my attention: a man dressed as Mahatma Gandhi, his body covered in silver paint, standing completely still. He would occasionally wave at children, but otherwise he looked like a statue. He had a box in front of him and even a QR code stuck to his trousers for those who preferred digital payments.

I asked him for his number and he mumbled something in Telugu. Days and many conversations later, with the help of a translator, I wrote about this man from Khammam in Telangana who dresses as Gandhi.

He said with regret that people were forgetting Gandhi and this was his way of reminding them about the father of the nation. This was also one way in which he was saving up for his daughter's wedding.

The same happened in Varanasi, where a casual stroll along Assi Ghat led me to a unique training ground for *gusthi* wrestlers. Before long, another story fell into place: I found that many young boys and girls go to the ground for strength training and learn *gusthi* in order to participate in local tournaments. Varanasi may be known for its spirituality, but physical fitness too is deeply woven into its culture.

One of the cardinal rules of life, and perhaps even more so in journalism, is to be curious, not judgmental. Curiosity is often the starting point for stories that reporters never set out to find.

As a journalist, it's not always about finding a story; sometimes, it's about allowing the story to find you.

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PICTURE OF THE WEEK

Tasting childhood



A sweet treat: Children eating chewy candy, a popular sweet of the city, at the landmark Marina beach in Chennai, which has been celebrating Madras Week, on August 27. R. RAGU

FROM THE ARCHIVES

The Hindu

FIFTY YEARS AGO AUGUST 28, 1976

Thanjavur teak to be auctioned

Tiruchi, August 27: For the first time teak grown on canal banks in Thanjavur will be put on auction by the Forest Department, Mr. K.A. Bhoja Shetty, Chief Conservator of Forests and Mr. Venkatakrishnan, Conservator of Forests, Tiruchi circle, said here to-day.

The Tamil Nadu Forest Department has proved that teak could be profitably grown on canal banks, they added and paid tributes to Mr. V.S. Krishnaswamy, erstwhile Chief Conservator of Forests, at whose initiative the Department took up teak cultivation on the canal banks of the Cauvery delta in Thanjavur district in 1955-56.

To-day teak has been raised over the entire network of the canal system in Thanjavur district covering an area of 8,000 hectares.

The first auction of the Thanjavur teak will be conducted on September 3 at Saliamangalam before the Conservator of Forests. All along teak came from the western ghats and hereafter at periodical intervals of three or six months, Thanjavur teak would be auctioned.

At the first auction over 2,500 poles would be available for bidding, Mr. Bhoja Shetty said.

Mr. Shetty added that similar teak plantations had been raised throughout the Cauvery baks and Tambarabarani bank belts.

A HUNDRED YEARS AGO AUGUST 28, 1926

Indian methods of teaching

A correspondent writes:– Dr. B.B. Dey, Professor of Chemistry, Presidency College, Madras, delivered the inaugural address of the Science Branch, Teachers' College Teachers' Association, Saidapet, on Wednesday, 25th at 5 p.m.

The lecturer pointed out that teaching work had come to be regarded as a very dull and dreary affair; and that the class of teachers were as a whole, considered as a group of very prosaic people.

Text & Context

THE HINDU

NEWS IN NUMBERS

Number of people at risk in Peru due to El Niño

1.2 million. The El Niño weather phenomenon, which has brought some rain and an unexpected rise in temperatures to Peru, could put more than 1 million people at risk in regions of the country vulnerable to climate change, according to national authorities. “Based on historical data from all the regions... approximately 1.2 million people could be affected,” they said. REUTERS

Number of migrants pulled from sea off Mauritania

160 The Mauritanian Coastguard said on Thursday that it had rescued more than 160 migrants, including 17 children, from a boat in trouble off its coast, its second major emergency operation in a week. The migrants were “exhausted by the journey and the insecurity of the vessel” when they were rescued, a Coastguard statement said. AFP

Budget approved by Taiwan lawmakers for locally made drones

7.6 in \$ billion. Lawmakers in Taiwan approved a \$7.6 billion budget for locally made drones on Thursday as the island democracy seeks to strengthen its defences against a potential Chinese attack. Taiwan has ramped up military spending in recent years and is building up its defence industry to make equipment and ammunition on the island. AFP

Number of Indian coal power plants with critical low fuel

45 Forty five power plants in India are operating with critically low coal inventories, government data showed, as monsoon rains disrupt supplies and electricity demand rises. The plants with coal stocks below 25% of their required inventory or with critically low stocks to generate power for less than three days has risen from 31 at the end of July, the data showed. REUTERS

Ladakh's revised VAT on natural gas to boost clean energy adoption

5 in per cent. Ladakh Lieutenant Governor Vinai Kumar Saxena on Thursday announced a significant reduction in value-added tax on natural gas from 21% to 5% to promote affordable clean energy and improve ease of living. He said the move would give a major boost to the Centre's larger plan to roll out the city gas distribution (CGD) network. PTI
COMPILED BY THE HINDU DATA TEAM

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Can India build a strategic fuel system?

India's proposed strategic-fuel programme would expand crude, LNG and LPG storage, but building reserves alone will not guarantee energy security; the system will work only if India can move the fuel through ships, pipelines and distribution networks, while having clear rules on ownership, financing, and replenishment

EXPLAINER

Kalyan Mangalapalli

The story so far:

West Asia-related disruptions have exposed a vulnerability in India's energy-security system. India can import large quantities of crude oil, LNG and LPG, but its ability to store, transport and release these fuels during a prolonged disruption differs sharply by fuel. India already operates underground strategic crude-oil storage and two underground LPG caverns, but has no operating underground natural-gas storage facility. Against this background, the government is considering a decade-long strategic-fuel programme that would add about 28 MT of crude-oil storage, 9 MT of LNG storage and 4 MT of LPG storage. Reuters reports that the proposed reserves are intended to provide nearly two months of crude and LNG demand and about six weeks of LPG demand. The programme remains under consideration and should therefore be treated as a proposed target, not committed capacity.

How much storage does India have today?

India's position varies considerably by fuel. For crude oil, Phase I of the Strategic Petroleum Reserve provides 5.33 MT of underground capacity, with actual storage of about 3.37 MT, or roughly 63-64% utilisation, across Visakhapatnam, Mangaluru and Padur. A further 6.5 MT has been approved under Phase II at Chandikhol and Padur.

However, execution on the Chandikhol project remains protracted amid ongoing land acquisition requirements and finalisation of commercial PPP frameworks.

LPG has a much smaller underground footprint. The Visakhapatnam and Mangaluru caverns together provide about 0.14 MT of capacity. A proposed 4 MT strategic reserve would therefore represent roughly a 30-fold increase in underground LPG capacity.

Natural gas presents the largest storage gap. India currently has no operational underground gas-storage facility. Its gas-security system instead depends on domestic production, LNG imports, import terminals, commercial inventories and pipelines.

These figures also highlight an important distinction between storage capacity and inventory. A facility has a physical capacity, but the fuel it holds can vary. Not all inventory is necessarily immediately accessible either. During a crisis, the critical measure is therefore not simply how many tonnes can be stored, but how much fuel is available and at what withdrawal rate it can reach consumers.

What does the proposed 9 MT of LNG storage mean?

LNG is particularly prone to confusion because India already has substantial LNG import and regasification infrastructure. A regasification terminal can receive LNG and convert it into natural gas, but its regasification capacity does not constitute strategic inventory.

LNG is stored as a cryogenic liquid at around -162°C, requiring specialised insulated tanks and boil-off gas management. Underground gas storage is different: LNG is first regasified and the resulting natural gas is injected into a depleted reservoir or cavern.



India already operates underground strategic crude-oil storage and two underground LPG caverns, but has no operating underground natural-gas storage facility. GETTY IMAGES

The PNGRB-ICF study provides a useful but narrowly defined stress test. Its 2030 scenario examined how much additional LNG infrastructure would be required to supply priority consumers for 20 days under stress conditions. It estimated a requirement of about 0.56-0.6 MT of LNG equivalent, achievable with roughly eight additional LNG tanks. The combined cost of the tanks and the associated strategic inventory was estimated at around \$1 billion. This was a scenario-specific estimate, not an assessment of India's overall strategic LNG requirement.

The proposed 9 MT strategic inventory is an order of magnitude larger. Against the ICF projection of roughly 58 MT of annual LNG imports, 9 MT represents about 56 days of imports – hence the description of approximately two months of LNG import cover. It does not mean two months of India's total gas consumption.

The difference is important. A 0.6 MT requirement addresses a 20-day priority-sector stress scenario; 9 MT represents a much broader strategic objective of buffering India against prolonged LNG-import disruption. The associated investment would therefore be substantially larger.

Does all the gas have to be stored as LNG?

No. India could eventually use a portfolio of surface LNG tanks and underground natural-gas storage.

Additional LNG tanks would hold inventory directly at import terminals. A separate proposal from the Ministry of Petroleum and Natural Gas would require LNG import terminals to maintain storage capacity 10% above their normal operating requirement, with the additional capacity available to the government during supply or price disruptions.

For longer-duration requirements, depleted oil and gas reservoirs, which account for 74% of global working gas volume, could provide much larger volumes of underground gas storage. Salt caverns offer different advantages: faster injection and withdrawal and the ability to cycle inventory more frequently, potentially making them useful for

shorter-duration balancing.

But a depleted field cannot simply become a storage site because production has ended. Reservoir characteristics, cap-rock integrity, pressure behaviour, existing wells, cushion-gas requirements and pipeline connectivity must all be assessed. India's sedimentary basins – including Krishna, Godavari, Cambay, Mumbai Offshore and Rajasthan – offer potential locations, but moving from geological potential to usable storage requires subsurface investigation, site selection, engineering, construction, testing, filling and pipeline integration.

Salt caverns face a similar qualification process. Rajasthan's salt-bearing formations have been investigated for solution-mined caverns, but suitability depends on depth, thickness, purity, geometry, groundwater and mechanical properties.

Can India scale its crude and LPG experience?

Crude is the most mature component. India already operates underground crude caverns and has developed the associated engineering capabilities. The U.S. Strategic Petroleum Reserve illustrates the scale possible with salt caverns, with authorised capacity of 714 million barrels across 60 caverns. But the U.S. system works as an integrated network of caverns, pipelines, marine terminals and refineries. Storage is therefore fundamentally an infrastructure system, not simply an underground space.

LPG is technically proven in India but presents a much larger scaling challenge. A proposed 4 MT reserve would require a substantial network of new caverns or other storage facilities, together with import terminals, pipelines, pumping systems and bottling infrastructure.

The Mangaluru cavern illustrates the complexity. Underground construction requires geological and hydrogeological investigation, rock-mechanics analysis and groundwater management, particularly where work takes place alongside operating surface facilities. Scaling the system would require sustained capabilities in geophysics, geomechanics, tunnelling, reservoir engineering and project execution.

What happens if the fuel cannot reach India?

Because energy security relies heavily on maritime logistics, including vulnerable chokepoints such as the Strait of Hormuz and long-distance routes from the U.S., India is proactively diversifying both its import sources and shipping capabilities. To reduce reliance on foreign vessels, State-run oil refiners and the Shipping Corporation of India plan to invest \$1.5 to \$2 billion in a joint venture to acquire 59 ships. Simultaneously, Indian Oil is expanding sourcing through new 2027 agreements with Algeria and increased U.S. purchases, while exploring direct stakes in Very Large Gas Carriers to secure greater control over its supply chain.

What about pipelines?

Pipelines provide the final link between imported or stored fuel and inland consumers. PNGRB has recently authorised approximately 1,800 km of new LPG pipelines across six States, involving investment of around \$0.7 billion. These pipelines improve connections between supply sources and inland markets and reduce dependence on road movement, but they do not themselves add strategic storage. Their value lies in improving deliverability.

The same principle applies to natural gas. Underground storage is useful only if it can inject into and withdraw from the gas grid at the required rate. LNG tanks are useful only when regasification and downstream pipelines can move the gas. LPG caverns require connections to bottling and distribution systems.

Who pays for the strategic reserves?

The reported \$42 billion programme, which has yet to be confirmed by the government, combines infrastructure CAPEX with the cost of purchasing and maintaining strategic fuel inventories. Reuters reported that more than half could go towards storage infrastructure, with the balance used to purchase and fill the reserves. Financing would be a challenge and the government shot down reports that a cess would be charged to pay for the reserves.

The financial obligation does not end with construction. Billions of dollars of fuel would need to be purchased, financed and maintained. Stocks released during a crisis would then have to be replenished, potentially when commodity and freight prices are higher. The policy therefore needs to establish who owns and finances the inventory, minimum stock obligations, emergency-release authority, and who bears replenishment and price risk. A commercial-cum-strategic model could reduce the public burden, provided commercially used capacity remains available during emergencies.

Is storage enough to make India energy-secure?

Building 41 MT of combined storage is only part of the equation. A strategic reserve is effective only if India can seamlessly access fuel, transport it inland, and replenish stocks after a release.

Ultimately, energy security relies on an integrated framework: reserves buy time, shipping brings the next cargo, pipelines deliver fuel inland, and governance dictates emergency execution. The ultimate test of India's strategic fuel programme will be its ability to coordinate all these elements simultaneously when a crisis hits. (The author is an Energy and Emerging Technologies expert)

THE GIST

India's existing strategic storage differs sharply by fuel, with crude having the most developed system, LPG a limited underground footprint and natural gas no operational underground storage facility.

The proposed 28 MT of crude, 9 MT of LNG and 4 MT of LPG reserves would represent a major expansion, but the LNG requirement should not be confused with existing regasification capacity or narrower 20-day stress scenarios.

Geological suitability, infrastructure and project execution will determine how quickly storage can scale, while shipping and pipelines remain critical to ensuring fuel reaches consumers during prolonged disruptions.

IN THE LIMELIGHT

Gulzar at 92: the remarkable art of staying relevant without ever standing still

Gulzar's career across poetry, lyrics, cinema, television, translation and children's writing has been marked by an unmistakable voice, reinvention and an incorruptible curiosity; his work has reached generations through its emotional heft and rare ability to distil the mundane into exquisite poetry

Kalyan Sundareswaran

A river runs for centuries and yet belies the idea of permanence. It flows away as it flows in, can both flood and run dry, take in tributaries, change course and annex newer territories. A long creative career carries a similar paradox. While retaining an essential recognisable voice, it must continually acquire new vocabularies. For over seventy years, Picasso painted and sculpted with evolving brilliance not merely surviving shifting artistic movements but actually spearheading most of them.

And there is not a more compelling Indian parallel to this than Gulzar. Rarely has someone spent decade after decade at the very summit of multiple demanding public crafts, without a prominent phase of decline and without the grandiosity that often accompanies greatness. An influential Urdu poet, a lyricist, a film and television director, author, screenwriter, children's writer, translator, Gulzar has looked into this world through every possible lens and the world too has looked back gratefully, bestowing on him some of the highest national and international honours, from the Dadasaheb Phalke Award to the Jnanpith Award, and from the Oscar to the Grammy. To tweak one of his own lines he wrote for the film *'Anand'* (1971), his career has not just been extensive but expansive too (*Zindagi badi honi chahiye, lambi nahi*).

Gulzar came to film songwriting at a time when the lyricists' fraternity was a formidable roll-call of masters such as Shailendra, Sahir Ludhianvi, Shakeel Badayuni, Rajendra Krishan amongst others. Gulzar wrote his first film song for Bimal Roy's *'Bandini'* – *Mora Gora Ang Laile* set in Vaishnava verse. And right away, he had found his niche as a lyricist in a roomful of titans.

A voice of his own

Though bound by the strict film song conventions of metre, rhyming, musicality, situations and the need to fit lyrics into a pre-composed tune, Gulzar has always commanded a singular, unmistakable idiom. While this signature is instantly perceptible, it defies easy definition. The style is a curious blend of abstraction (*Is mod se jaate hain* from *'Aandhi'*), symbolism (*Wo Yaar hai Jo Khushboo Ki Tarah*, *Jiski Zubaan Urdu Ki Tarah* from *'Dil Se'*), poetic flourish (*Do Nainon Mein Aansoo Bhare Hain*, *Nindiya Kaise Samaye* from *'Khushboo'*), paronomasia (*Sare ke Sare gama Ko Lekar Gaate Chale* from *'Parichay'*), political messaging (*Haal Chaal Thiak Haal Hain* from *'Mere Apne'*), allusion to nature (*Hawaon Pe Likh Do* from *'Do Dooni Chaar'*), vivid imagery (*Chhote Chhote sheheron* from *'Bunty Aur Babli'*), dark humour (*Goli Maar Bheje Mein* from *'Satya'*), arcane vocabulary (*Aab-o-dana dhoondhte hain ek aashiyaana dhoondte hain* from *'Gharonda'*), a rich worldview (*Aane Wala Pal* from *'Golmaal'*), and above all, an emotional heft (*Humne Dekhi hai In Aankhon Ki Mehekti Khushboo* from *'Khamoshi'*) that can entirely ambush a listener mid-song.

Critics may argue that such sophistication is at odds with a "film" song, a form expected to resonate with the masses without demanding much of



Gulzar. FILE PHOTO

interpretive labour. And yet Gulzar has repeatedly proven otherwise. Many of his songs have captured popular imagination like none other, such as *Humko Mamm Ki Shakti Dena* from *'Guddi'*, a regulation prayer song in schools even today, or *Beedi Jalaile* from *'Omkaara'* oozing a rustic exuberance or the infectiously playful *Kajra Re* from *'Bunty Aur Babli'*. Despite his uncommon idiom, his songs have found universal acceptance, aided by composers such as R.D. Burman, A.R. Rahman and Vishal Bhardwaj who have matched their crafts effortlessly to his calibre.

The same intellectual courage defines Gulzar's trajectory as a filmmaker and a screenwriter. Many of Gulzar's films have been adapted from works of literature. As a writer himself, he could easily find a story's emotional register and seamlessly infuse it into cinema with sensitivity to things like language, character, subtext, silence, refrains and motifs. He also made films which were topical, championed progressive values, spoke truth to power, presented nuanced worldviews and asked uncomfortable questions all without ever tipping into preachiness. His debut film *'Mere Apne'* placed disaffected youth at the centre of a story about political disillusionment and loneliness. His *'Aandhi'* was a political drama which gave its female lead enormous agency, where the male lead plays second fiddle to her. His *'Mausam'* delicately handles the misplaced romantic affection a sex worker feels for her own biological father, a narrative choice most directors would have flinched at back then. His *'Maachis'* was a bold and layered exploration of

radicalisation set against the Punjab insurgency, probing raw wounds without pointing fingers. He has never been the one to take the easy path, neither in his choice of subjects nor in his treatment of them.

Beyond the world of cinema

As a poet and a prose stylist outside films, Gulzar has been nothing short of prolific. His Partition stories carry the emotional authority of having experienced it first-hand. He has written for children with the same sincerity he reserves for adult readers. His poetry seamlessly moves between the formal architecture of the Urdu *ghazal* and *nazm* and the autonomy of the free verse. He is also the creator of the *Triveni*, a three-line verse akin to an Indian *Haiku* whose third line, with a sleight of mind, entirely alters the emotional meaning of the first two. Translations are a telling part of Gulzar's oeuvre. Apart from translating literary giants such as Tagore and Kusumagraj independently, he has also translated several scores of contemporary poets across all Indian languages, which have been anthologised in his *A Poem a Day*. What emerges from this vast body of work is simply a relentless love not just for the written word but also for the reader and a rare ability to distill the most mundane into exquisite poetry. Gulzar is like the itinerant water-carrier whose vessel continues to pour out to generations of thirsty readers and yet always remains filled to the brim.

Another remarkable aspect of Gulzar is his unmitigated affection and respect for his seniors and peers that runs through

his work, somewhat like the moon borrowing the sun's luminosity but making it gentler for the passage. Be it in his biographical sketches or in his long-form interviews or even his adaptations of their lives and works, there is an unfeigned humility and a willingness to let someone else's genius stand taller than his own. He has quoted or paraphrased other poets such as Khusräu, Ghalib and T.S. Eliot in his works, showing how grounded and secure he is in his own craft. His narratives on the likes of his mentor Bimal Roy, his friend R.D. Burman, his seniors Shailendra, Sahir, Faiz and many others are full of tenderness. His television serials *Mirza Ghalib* on the life of the talismanic Urdu poet and *Tehreer Munshi Premchand Ki* too are glorious cases in point.

The Gulzar phenomenon

Yet, his towering stature has ironically birthed a curious modern phenomenon. Having assumed a quasi-mythological status amongst the masses, Gulzar's name is routinely invoked to lend gravity to mediocre verse he never wrote. The Internet is awash with lines misattributed to him to confer credibility and heft to anything vaguely poetic. It is an irony of our times that the more a voice commands our trust, the more it is forced to speak words it never uttered. Though a vigilant community of admirers actively combat this digital misattribution through the hashtag #NotByGulzar, its sheer volume shows how perversely his poetic persona has permeated the public consciousness, more as a brand to be flaunted rather than the painstaking artist he has always been.

In an age of public posturing where dilettantes know just enough to make sparing content for mindless scrollers with decreasing attention spans, where flamboyance is rewarded more than moderation, where the patient romance of Test cricket has lost ground to the tillations of T-20, Gulzar stands as a raging testimony to longevity and restraint. His endurance is less owing to a kind bargain struck with time than to his rigour, his resilience as a man of his craft and his incorruptible curiosity that still propels him to say things and find new ways of saying them.

In one of his own songs from the 80s film *'Hip Hip Hurray'*, he writes: *Roz tere jeene ke liye ek subah mujhe mil jaati hai*

Murjhati hai koi shaam agar to raat kahin khil jaati hai

Main roz subah tak aata hoon, aur roz shuru karta hoon safar

Haath badha ae zindagi, aankh milake baat kar

(Everyday to live by you, I find a morning bright

Even as the evening withers, out blooms the night

I get to the morning everyday, and start my daily streak

Give me your hand, life, look me in the eye and speak)

As Gulzar turned 92 this August 18, 2026, what sets him apart is his ability to repeatedly meet life with the alertness of someone encountering it for the first time, look it right in the eye and dare to chronicle its triumphs and sorrows with fidelity and imagination.

(Kalyan Sundareswaran is an IT professional with Infosys. Views expressed are personal.)



FROM THE ARCHIVES

Know your English

S. Upendran

What is the plural of “staff”? (S. Srinivasan, Madurai)

If you are thinking of people working in an organisation, then the plural is “staff”.The word is an uncountable noun. In most universities, for example, we have teaching staff and administrative staff. Like the nouns “jury”, “government”, etc., the word “staff” can be followed by either a singular or a plural verb. Here are a few examples.

The staff is of the opinion that we should go on strike.

The staff were excellent.
The word is normally not used to refer to a single individual. If you wish to refer to a single person, then you could say “staff member”, “staff person”, etc. Some people use the word “staffer”; not everyone, however, accepts this word.

What is the difference between ‘fairly’ and ‘rather’? (B. Lakshmi Chandrasekhar, Vijayawada)

“Rather” is the stronger of the two words. When you say that the movie was “rather good”, it implies that it was pretty good; it was much better than you had expected. So in your opinion, people should go and see it; you recommend it. On the other hand, when you say that it was “fairly good”, what you are implying is that it was ok. There was nothing great about the film; if the friend wants to, he/she may go and see it, but you wouldn't recommend it.

Similarly, when you tell someone that his English is “fairly good”, you are not really complimenting him. All that you are saying is that his English is ok. Here are a few more examples.

Jyothi made a fairly/rather good presentation.

During summer, it gets fairly/rather warm.

What is the origin of the expression “French leave”? (M. Ram Mohan, Narsampet)

This is another example of how much the English hated the French. I guess we shouldn't be talking about this now, considering the fact that the two have joined forces along with the United States to fight the Taliban.

But historically, the two nations couldn't stand each other. Even now, it is not uncommon for an Englishman to refer to a Frenchman as a “frog”, because the French consider frog legs a delicacy. The term “French postcards” is used to refer to picture postcards with naked ladies on them. When someone uses foul language, you can hear the person saying, “pardon my French” –thereby implying that the French had the habit of swearing.

When someone goes on “French leave”, he or she takes off without informing the authorities. According to the English, it was standard practice in France in the 18th Century to leave a ball or dinner without thanking the host and hostess. People left without even saying goodbye. The English felt that the French were people without manners. But what is interesting is that taking leave of someone in this manner is referred to as “English leave” by the French! What the Americans call “French postcards”, the French call “American postcards”.

It is interesting to note that countries, which have such a low opinion of one another, have come together to fight terrorism! I guess they don't mind the war of words.

Published in *The Hindu* on October 16, 2001

THE DAILY QUIZ

On the occasion of Raksha Bandhan, here is a quiz on brothers and sisters

V.V. Ramanan

QUESTION 1

In politics, he was the first PM of his newly independent country, while she became the first woman President of the UN General Assembly in 1953. Name the famous siblings.

QUESTION 2

This famous 1807 work that narrated the works of a famous English playwright was authored by a brother-sister duo. Name them and the work.

QUESTION 3

According to historians, Ptolemy XIII and Ptolemy XIV were consorts and ruled alongside their sister, who is considerably more famous and legendary than the two men. Name her.

QUESTION 4

In later Ramayana traditions, what was the

name of Rama's elder sister, who was married to the sage who oversaw the sacrifice that Dasharatha performed for obtaining sons?

QUESTION 5

Name the Russian siblings who have not only won titles at a tennis Major but are the only brother and sister to reach the No.1 ranking in singles.

QUESTION 6

The National Bravery awards given by the Indian government are named after two teenagers who were murdered after being abducted in Delhi in 1978. Name the two.

QUESTION 7

In Greek myth, name the twins born to Zeus and Leto, with one becoming the god of prophecy, music, healing and archery and the other the goddess of the hunt, wilderness and childbirth.



Visual Question:

Name these siblings who have also won Oscars apart from the Grammys and other leading awards. AP

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

1. Who led the Visigoths who sacked Rome in 410 CE? **Ans: Alaric I**
 2. For approximately how long had Rome avoided being sacked by a foreign enemy before 410 CE? **Ans: Nearly 800 years**
 3. Which Roman emperor was ruling the Western Roman Empire when Rome was sacked? **Ans: Honorius**
 4. Which city served as the capital of the Eastern Roman Empire at the time? **Ans: Constantinople**
 5. Which Christian theologian wrote The City of God in the aftermath of the sack of Rome, addressing arguments that the rise of Christianity had contributed to Rome's troubles? **Ans: St. Augustine of Hippo**
- Visual: Identify the Roman writer who described the catastrophe with the words, “The City which had taken the whole world was itself taken.” **Ans: St. Jerome**
- Early Birds:** Siddhartha Viswanathan | Erfanally Oosmany | Suchit Narottam | Dodo Jayaditya | Parimal Das

● **WHAT THE OTHERS SAY**
In an era of multiparty politics, first past the post risks generating perverse outcomes.— *The Guardian*

The Ideas Page

FRIDAY, AUGUST 28, 2026



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11

DIS/AGREE

THE BEST OF BOTH SIDES

A weekly column, which offers not this-versus-that, but the best of both sides, to inform the debate

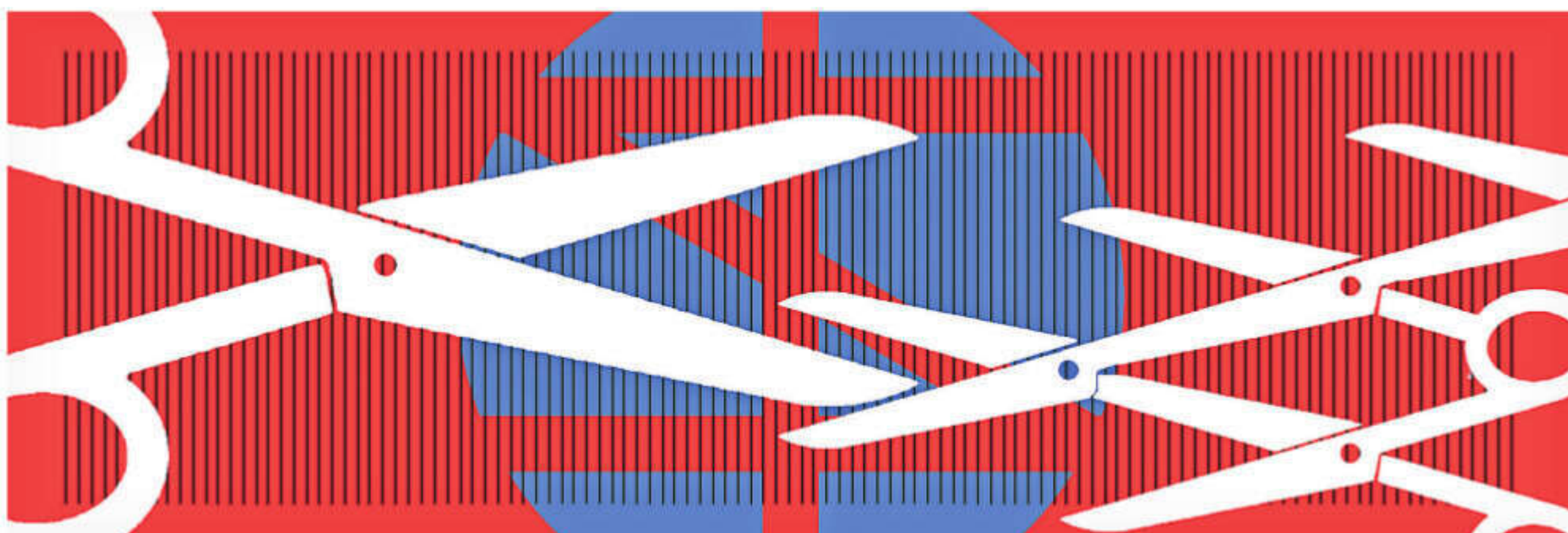


ILLUSTRATION: C.R. SASIKUMAR

Is Canadian PM Mark Carney's middle power solidarity approach an apt counter to Trump's playbook?

Carney's defiance is well thought out



VIKAS SWARUP

THERE ARE moments in international diplomacy when the most audacious thing a country can say is "no". Mark Carney has just provided one. The Canadian Prime Minister walked away from trade negotiations with the US after Washington put forward terms Ottawa deemed unacceptable, including demands that would have come at the cost of its sovereignty, key industries, French language and culture, and its freedom to negotiate with other countries. Carney's formulation was blunt: The Americans "asked too much and offered too little". He has also announced dollar-for-dollar retaliation against new US tariffs, making clear that Canada will not absorb American pressure without imposing costs of its own. He deserves applause.

Canada sends roughly three-quarters of its exports south, into an economy roughly 10 times its size, and a sustained trade confrontation could put up to 90,000 Canadian jobs at risk. But Carney's gamble is not without its logic. It rests on three key calculations.

One, he has broad domestic backing, including from the Conservative opposition, amid public frustration with US President Donald Trump's threats and repeated talk of making Canada the 51st state. Two, the new tariffs apply to only about 5 per cent of overall Canadian exports to the US, roughly \$20 billion. And three, the breakdown will also hurt the US.

Canada is the largest export market for 26 American states and among the top three trading partners for 45 of the 50. It supplies roughly 60 per cent of America's crude-oil imports. Canadian electricity helps power grids in New England and the upper Midwest. Canadian potash is vital to American agriculture, while Canadian critical minerals feed strategically important American supply chains. A prolonged trade war, therefore, cuts both ways.

The timing is also hardly ideal for Washington. The stalemate with Iran has pushed US gasoline prices above \$4 a gallon, while the 30-year Treasury yield has climbed above 5.3 per cent, its highest level since 2007. Federal debt has crossed \$40 trillion, and Trump's net approval rating has fallen to minus 26 per cent. Carney does not need to win a trade war outright. He only needs his retaliatory tariffs to land on the right swing states long enough to make the arith-

metic politically painful in Washington.

There is another reason his gamble deserves attention. Carney did not improvise his defiance. After his warning in Davos, that middle powers must stand up or risk ending up "on the menu", he spent the better part of a year building trade ties with China, the Gulf, and Asia, India among them, so that a closed door in Washington did not mean a locked room globally. That is statecraft of the highest order. And this is why the Canadian episode matters far beyond Canada.

From Mexico City to Brussels to Tokyo, governments have spent the past year confronting an American president who increasingly treats a signed trade agreement not as a settlement, but as an opening bid that can be revisited whenever it suits him. Trump's playbook has remained unchanged: Coerce partners with escalating tariff threats, demand unilateral concessions on domestic policy, and attempt to impose restrictions that erode national economic sovereignty. The conventional wisdom in many capitals has been to bend, compromise, and sign whatever deal avoids immediate retribution. Carney tore up that playbook. By walking away from unacceptable terms, Carney demonstrated a fundamental truth of international relations: It is always useful — and often necessary — to stand up to a bully. If Canada demonstrates that a middle power can withstand US pressure by exploiting its own strategic importance, diversifying its markets and making the costs of retaliation visible inside America, it changes the negotiating psychology for everyone else.

India should pay close attention. New Delhi is still waiting to conclude its own trade deal with the US, and India has powerful reasons to pursue one. Access to the US market matters enormously to Indian exporters, just as American capital and technology remain crucial for domestic growth. Ultimately, a stable trading relationship with Washington is firmly in India's national interest. But the need for a deal must never mutate into a willingness to accept any deal.

India must know what it can negotiate and what it cannot. It must protect policy autonomy, avoid concessions that permanently damage vulnerable sectors and retain the freedom to pursue independent economic and strategic relationships. Above all, it must build alternatives. So that if its own moment to say "enough" arrives, it costs a great deal less to say it.

Trump's calculus is that in a contest between unequal powers, the bigger bully always wins. Carney has just shown that, in geopolitics as in life, size isn't everything.

The writer is a former high commissioner to Canada



T V PAUL

MARK CARNEY walking away from a lopsided trade deal with the US raises the question of whether Canada can withstand American economic and political pressure. More than 70 per cent of Canada's trade is with the US, compared to about 15 per cent of US trade with Canada. A great power is asserting dominance over a neighbour that Donald Trump has repeatedly portrayed as a potential 51st state or, at minimum, a vassal with limited capacity to pursue independent policies.

Canada's defiance will bring short- and potentially medium-term pain to its economy and standard of living. The \$27 billion in dollar-for-dollar tariffs announced by Ottawa could further anger Trump and prompt additional tariffs on Canada. If the US carries out its threatened 50 per cent tariffs on Canadian autos and steel from January 1, and Canada's threatened retaliatory tariffs on oil and electricity exports take full effect, prices could rise significantly on both sides of the border. High unemployment could follow.

But countries do not always behave according to economic rationality when confronting a cantankerous neighbour. When the stronger side asserts too much power, it can generate nationalism in the weaker country, as is evident in Canada today. Carney cannot unilaterally accept a trade deal that could become a domestic quagmire for him and the Liberal Party. For provinces like Ontario, the auto-parts provisions are a major issue; for Quebec, restrictions affecting French-language marketing are a no-go zone. Separatist movements in Quebec and Alberta could also be emboldened if Ottawa were seen as submitting to American pressure, although Alberta could be particularly affected by any Canadian tariffs on the oil products it exports to the US. Washington appears to have underestimated Canada's domestic dynamics and the implications for its federalism.

Carney's calculation may be that, despite the power asymmetry, Canada holds several trump cards that can be used in the negotiations. Studies show that Canada performed well in previous North American Free Trade Agreement negotiations and in negotiating its successor, the Canada-United States-Mexico Agreement. Canada secured several provisions that are now being contested, although their long-

term benefits remain uncertain.

The larger issue is Canadian sovereignty and its determination not to be, as Carney himself has put it, a "subsidiary" of the US. The Trump administration's neo-imperial policies do not distinguish reliably between allies and adversaries. Carney wants to diversify Canada's trade relationships, including with China and India, and reduce its dependence on the US market. This strategy is integral to the vision he presented in Davos that middle powers such as Canada should remain independent actors. Protecting and strengthening Canadian manufacturing in collaboration with partners in Europe and Asia will be central to that strategy.

For the Trump administration, time may be short. Impending electoral cycles could constrain its policies. Carney may be calculating that a mercurial president could abandon an agreement at any time over another issue, perhaps even one driven by personal considerations, and that a possible Democratic victory in the November congressional elections could place greater restraints on Trump's unilateralism. Moreover, more than half of all American states depend heavily on trade with Canada and could pressure Trump and his trade negotiators to make concessions and compromises.

If Canada succeeds in persuading the US to compromise, it could provide other countries with an example of how to deal with Washington. In the long run, external pressure could also help Canada build a more self-reliant economy capable of manufacturing a broader range of products, despite its relatively small population and economy.

A stronger Canada can say no to America's tendency toward neo-imperialism and neo-mercantilism. Even during the Cold War, Canada resisted participating in some US military interventions and has now refused to join the ongoing Iran war. Canada also maintained diplomatic and economic relations with Cuba despite US efforts to isolate the communist regime. America under Trump is more strident, while Canada's options are limited: Accept an unfavourable trade agreement or stand firm in pursuit of a better one.

Other middle powers and European partners are closely watching the emerging saga. They are unlikely to form a formal coalition of resistance with Canada, but they can cooperate with Ottawa in less conspicuous ways. Sometimes ruptures and crises are necessary, even among friends, to make clear what is at stake in unequal relationships. Canada may be doing the international order a favour by refusing to concede.

The writer is Distinguished James McGill Professor at McGill University, Canada

On workers' rights, shrinking spaces and cruel state response



AJAY SINGH

FORTY THOUSAND to 50,000 casual workers die every year due to occupational hazards in India's unorganised sector, according to numerous research studies. This is just the tip of the iceberg, as many perish without even a mention in official records.

India's unorganised sector, which employs nearly 80 per cent of the workforce, bears the burden of this regular massacre. Human lives are counted as the collateral cost of development, ignored much like the demolition of anthills for construction projects.

Are we aware of the abject conditions in which workers on real-estate projects live? Are we not aware of stories of domestic helps being subjected to inhuman conditions and torture in housing societies that are among the most expensive in Delhi-NCR and other metros? We read these stories as remote observers, as if they are not connected to people like us. They are not our stories.

On April 13, when thousands of workers in Noida and Ghaziabad took to the streets to demand higher wages, the Noida police, caught off guard, all but invented a conspiracy theory about the agitation being sponsored by "Pakistan-based handlers" and radical leftists. In no time, the agitation was not only "otherised" but also criminalised to a large extent. About 200 people were arrested for inciting violence, in-

cluding two — journalist Satyam Verma and DU student Akriti Chaudhary — under the draconian NSA, not for their acts but for their ideological leanings. While the Uttar Pradesh government announced higher wages, those who were arrested fought a grim battle in courts and continue to face the aftermath even after coming out of jail.

The episode was noticed by the wider public, possibly because it disrupted traffic for many hours, causing some to miss their appointments and flights. Otherwise, workers' plight or agitations rarely make news.

The liberalisation of the Indian economy has progressed to the point where the trade union movement has become a relic of a distant past. The trade union movement produced great leaders such as George Fernandes, but that era is over. Since "working journalists" were classified as labour, there were union leaders in newsrooms and printing presses too. Sometime in the 1990s, news organisations began hiring people on a contract basis instead of on the payroll for the long term. That was part of a trend already under way in many sectors. Event-



ually, the biggest employer in the country, the governments at the Centre and in the states, also adopted it as a cost-saving exercise, precipitating the "casualisation" of labour.

As a result, workers and employees today have no means to demand better working conditions or fight against any injustice. This is also a time when the Left parties are losing their political strength and even relevance. In social-media parlance, "leftist" is used as a pejorative. Those protesting in Noida were, of course, "leftists" in the old as well as the new sense of the term.

In the whole Noida episode, the conspiracy of silence shocks me no end. In my formative years of journalism in Kanpur in 1985, I had seen a bond of unique camaraderie among leaders of trade unions, irrespective of their ideological pursuits. The CITU, AITUC, INTUC, BMS and others would join hands for the cause of labour. Workers in textile mills and in the defence sector justifiably earned their rights by dint of their consistent struggles against the management. The trade union movement consolidated workers' unity and did not divide them on ideological grounds. The leaders of the BMS and the CITU would not work at cross-purposes despite their ideological differences. This was why Kanpur, despite being a predominantly

Brahmin constituency, was represented in the Lok Sabha by S M Banerjee, a veteran trade union leader, from 1957 to 1977.

What is particularly galling is the criminalisation of written material in the possession of an individual. How can a book on Marxism, or on Gaza or the Palestinian struggle, be categorised as a criminal offence? In India's polity, the Marxist ideology is as much part of the

political mainstream as the Congress or the BJP. All political parties that swear loyalty to the Indian Constitution are allowed to grow and function in the country.

In the past, political parties and their leaders had shown sagacity and flexibility in accommodating ideological adversaries. This was evident when, in 1997, the BJP's national executive passed a resolution mourning the assassination of AISA leader and former JNU Student Union president Chandrashekar by Mohammed Shahabuddin in Siwan. Chandrashekar belonged to an ideological stream aligned with the Naxal ideology.

Perhaps, in today's context, the BJP's national executive resolution of 1997 would itself be treated as seditious material by the Uttar Pradesh Police — worthy of slapping the NSA against someone if it was found in their possession.

Singh was press secretary to President Droupadi Murmu and former president Ram Nath Kovind and is the author of 'The Architect of the New BJP: How Narendra Modi Transformed the Party'

LETTERS TO THE EDITOR

Nepal tragedy

MY HEART goes out to all the families who have lost their loved ones in the Nepal flash flood ('Over 100 Indians among hundreds missing in Nepal flash flood fury', *IE*, August 27). Evidently, nature's fury once again has been laid bare. There are no prizes for guessing that heedless development and obliteration of the environment have made such natural disasters more frequent and fatal. The Nepal tragedy is a reminder to people, governments, and other stakeholders across the world to mend their ways and adopt an environment-centric approach to the future.

— *Aanya Singhal, Noida*

No longer silent

THE ARTICLE captures an important shift in Indian democracy: Young people are no longer content to be silent spectators ('Young found their voice. Opposition needs to find its language', *IE*, August 27). The recent CJP-led mobilisation is a reminder that when institutions fail to adequately hear the concerns of the younger generation, they can find new spaces — and new languages — to make themselves heard. For students, these concerns are deeply personal: Exam pressure, paper leaks, cancelled examinations, un-

employment, rising educational costs and the uncertainty of building a secure future. Their voice is not merely a political trend; it reflects a generation asking for fairness, dignity and opportunity. Young people do not need political parties merely to speak on their behalf; they need institutions that are willing to listen, include and trust them. The CJP experience also demonstrates how digital platforms can turn individual frustration into collective civic engagement.

— *Fathima Ferzin Dilna N, Kannur*

Mutual respect

MUMBAI'S STRENGTH has always rested on its cosmopolitan character ('Language & religion dikats shrink Mumbai', *IE*, August 27). Attempts to impose language or religious preferences on citizens can weaken this social fabric and discourage people from different backgrounds from living and working together. Political leaders should avoid turning cultural identity into a tool of exclusion. The civic administration must ensure that public services, employment and housing remain accessible without discrimination. Respect for Marathi and local traditions is natural, but it should coexist with equal citizenship and mutual respect.

— *A Myilsami, Coimbatore*



SHIVANI SIBAL

THERE IS nothing that says you are growing old more than a sentence that begins with "In my time...", but here I am.

There was a time, I gather — perhaps from the experience of being on the receiving end of parenting rather than the service-provider end, which it very much feels like now — when expectations of the whole thing were simpler. One hoped to raise children who were decent, reasonably happy, able to cope with the real world, and not a menace to others, perhaps as a result of the first three goals.

Modern parenting is a much more elaborate operation. It is no longer enough to feed, house, love and generally guide children and hope for the best. We are curating them, making sure that every moment

Don't herd children through narrow tunnels

they spend on mother earth is optimised. In modern all-rounder hell, our kids must eat right, do well at school, play an instrument (because music and maths or something), not look at screens (bad, the very worst), and soon. Even playing is not called playing anymore. It is free play, and it has a window in the schedule.

To parent today in a way that is even reasonably boast-worthy is to endlessly schedule, supervise, monitor, enrich and improve. Decisions that were previously ordinary now come with inbuilt moral undertones. A snack is not a casual item one might pick up when hungry. It carries the weight of health, discipline and future habits. School holidays spent resting are deemed "wasted". We are trying to get our kids somewhere — wherever it is we imagine they are meant to reach — quicker and better than the others.

This fear is central to modern optimisation culture. *Log kya kahenge*. So-and-so's

child is in the state swim team, or got a full scholarship to university. What is yours doing? It is striking how much of modern parenting is organised against FOMO. It is no longer enough to raise good children; we must all be raising exceptional ones. Children are like adults, in that they sometimes feel lazy and sometimes motivated, hesitate, surge ahead, have self-doubt, fail, try again, and sometimes give up. None of this is accounted for in the graph society currently lays out for them.

What makes this entire framework even less plausible is that no one can say with any certainty what sort of future it is we are preparing them for. What we can say for sure is that it is more uncertain than it has been in living memory because of the arrival of artificial intelligence. We are in the discovery-of-fire, invention-of-wheel territory of change here. Yet we continue to herd and nudge the young through narrow tunnels of achievement as we have known it so far, as if

we can confidently predict what forms of excellence will matter in the future and which will not. A great deal of what is currently measured as achievement — perfect recall, conventional academic superiority, several currently coveted professions — is beginning to look alarmingly perishable. All the things we are pushing our kids to excel at may well end up turning into dust.

One of the most important things we can prepare our children for is uncertainty, and that is truer today than ever. To tell them that everything they are doing today, because we tell them to, will reap rewards, when the world ahead may not require or value it at all, is doing them a disservice. We can hope, instead, that they are able to adapt to whatever is coming, because there is no real way to prepare them for a future we cannot yet envision. That uncertainty is the crux of the human condition. It always has been.

Sibal is the author of Equations

• NEPAL DISASTER

Echoes of past, warning for future

The devastating flash floods in Nepal are just the latest reminder of the vulnerability of the Himalayan region to similar natural disasters — from Kedarnath in 2013 to Dharali last year



AMITABH SINHA

THE DEVASTATING flooding in Nepal's Bhotekoshi-Trishuli river, which has already claimed more than 350 lives, is yet another reminder of the vulnerability of the Himalayan region to major disasters.

Though they were all triggered by a unique set of circumstances, the Nepal tragedy is not very different from similar disasters seen in India over the last 15 years — Kedarnath in 2013, Chamoli in 2021, Sikkim's South Lhonak lake in 2023, and Uttarakhand's Dharali last year.

Each of them involved a very large and sudden release of waters in the mountainous rivers, either due to a breach in a glacial lake, or because of a large block of glacial ice breaking off and falling into the river.

The breach in the lake or the breaking off of the ice-block can be spontaneous — under accumulated stress over time — or be caused by an extremely heavy rainfall, a landslide or an earthquake.

The end result, however, is the same — a series of cascading events in which a mass of water, stones and soil gushes downstream at great speeds, eroding river banks, uprooting trees, triggering landslides, and destroying buildings, roads and bridges. All the debris being collected by the river on the way further strengthens its force, and its potential to cause damage. The situation continues till the river arrives at a flatter landscape, offering the raging flow an opportunity to spread out and disperse.

What caused the Nepal event

Wednesday's event, which started in the northeastern district of Rasua in Nepal, is currently understood to have been triggered by a rock and ice avalanche, a result of a large block of glacier in the upper reaches of the Bhotekoshi river (the lower side is also called the Trishuli) falling off. What caused this break-off is not very clear as of now. There was no heavy rainfall incident recorded in the area, so that factor is largely ruled out.

The US Geological Survey had reported a 4.4 magnitude earthquake in the region on Wednesday, which was initially believed to be the trigger. On Thursday morning, however, it said the signal that was captured by its sensors was most probably a result of a landslide and not a seismic event.

"This event was initially reported as a magnitude 4.4 earthquake. Additional analysis of nearby seismic stations, long period seismic waves and satellite imagery led to the determination that the seismic event was instead a glacial collapse and debris flow, and that no earthquake had occurred," said the USGS update. That could mean that a large chunk of snow broke off from the glacier on its own, possibly under its own internal stress, and caused a landslide which triggered the chain of events.

But Syed Iqbal Hasnain, a veteran glaciologist and former vice-chancellor of University of Calicut, pointed out that ice-blocks were not visible in any of the videos of the disaster. "The ice that breaks off from a glacier is almost like a solid rock. It does not melt immediately. But no ice block is visible in the videos of the incident. It is possible therefore that the incident was caused not by ice blocks breaking off from a glacier, but from



THE TRAIL OF DESTRUCTION

THE DISASTER in Nepal was most likely triggered by a rock and ice avalanche, a result of a large block of glacier in the upper reaches of the Bhotekoshi river (the lower side is also called the Trishuli) falling off.

THE CAUSE of the break-off is unclear as of now. While an earthquake was speculated earlier, it has emerged that it was the break-off that caused the seismic event.

THE EFFECT, however, was devastating — from the Gyirong land border between China and Nepal to Nuwakot district and beyond.



PHOTOS: AGENCIES; NOTE: MAP SHOWS APPROXIMATE LOCATIONS OF SITES SEEN IN PHOTOGRAPHS

a glacial lake outburst," he said.

Safi Ahsan Rizvi, an IPS officer who worked with the National Disaster Management Authority (NDMA) before his retirement, suggested that it could have been a result of a breach in a "supra-glacial lake". Lakes are generally formed at the end of a glacier, but sometimes, mainly as a consequence of climate change, lakes emerge within the glaciers themselves, and are known as supra-glacial lakes. A breach in this kind of lake could explain the lack of ice blocks in the visuals.

Previous events

The actual sequence of events can be ascertained only after scientists are able to complete a comprehensive study. But it unfolded in a manner very similar to the other incidents in India in the previous years.

"As of now, the Nepal event looks very similar to the Chamoli disaster of 2021 in the way it got triggered. But in terms of its impact downstream, and the destruction it has caused, it is more like the Kedarnath tragedy of 2013," said Farooq Azam, an associate professor at IIT Indore. Azam currently heads the Cryosphere group at the

Kathmandu-based The International Centre for Integrated Mountain Development (ICIMOD), a major research organisation working on the Himalayas.

Chamoli was caused by an ice and rock avalanche, a result of a large ice-block of a glacier, estimated to be 27 million cubic metres in all, breaking away and falling downhill. Kedarnath, on the other hand, was a GLOF (Glacial Lake Outburst Flood) event, the result of a breach in a glacial lake.

The Kedarnath incident was much more devastating. The damage potential of an event like this depends on factors like geography, the incline of the river, vegetation, population and urbanisation. The amount of rock and ice that fell off in the Nepal incident is yet to be estimated, but the fact that its fall was captured as a fairly large seismic wave (USGS had revised its 4.4 measurement to 5.2) suggests the involvement of a very big chunk of mass. It is not surprising, therefore, that the impact of the Nepal event appears to be significantly bigger than the Chamoli incident, in which about 200 people were reported to have been killed, or gone missing.

The reason these events in the Hima-

layan region become so risky is that while they start off as individual events — extreme rainfall or landslide or lake overflow — they soon transform into a multi-hazard disaster, involving multiple landslides, flooding and building collapse episodes.

"The Himalayan region is very fragile. Such events lead to a chain reaction. A surging river with large rocks and ice blocks would erode the banks and slopes, and more soil, mud and rocks would become part of the raging river. It becomes a cascading disaster because the waters do not have any other way to spread out. That is why any such event in the Himalayan ecosystem becomes extremely dangerous," said Azam, currently in China attending a disaster risk reduction conference.

A study published in *Science* magazine last year about a 2023 event in Sikkim captured the cascading impact of such flash flood events in the mountains. This event had been triggered by the collapse of a large chunk of glacier into the South Lhonak lake, situated over 5,000 metres above sea level, in northern Sikkim. This led to a GLOF event that took the shape of flash floods.

The study found that a landslide had re-

• HIMALAYAN DISASTERS

KEDARNATH, 2013: In June, Uttarakhand received an unusually high amount of rainfall, leading to the melting of the Chorabari glacier and the Mandakini river overflowing. The floods affected large parts of Uttarakhand, Himachal Pradesh and Western Nepal, causing massive flash floods and landslides. Nearly 6,000 people were presumed dead.

CHAMOLI, 2021: A large glacier broke away and set off a flood, leading to surging waters in the Rishiganga river in Uttarakhand. Over 200 people were reported dead.

SIKKIM, 2023: A glacial lake (large bodies of water that sit in front of, on top of, or beneath a melting glacier) situated in northwest Sikkim at 5,000 metres burst due to incessant rains. It led to the release of water in downstream areas and the deaths of at least 55 people.

DHARALI, 2025: The terrain of the region in Uttarakhand (6,900 metres above mean sea level), combined with continuous rain for days, triggered mudslides, debris slides and flash floods. At least 69 people were reported dead.

sulted in the collapse of nearly 14.7 million cubic metres of rocks, soil and snow deposited around a glacier into the South Lhonak lake, which triggered a series of cascading events. The volume of the flowing sediment downstream had grown to about 270 million cubic metres.

"The collapse of approximately 14.7 million cubic metres of frozen lateral moraine into the South Lhonak Lake... on 3 October 2023 generated a 20-m-high displacement wave. The wave overtopped and breached the frontal frozen moraine, causing the sudden drainage of approximately 50 million cubic metres of water... The GLOF eroded approximately 270 million cubic metres of sediment and triggered 45 secondary landslides. Most of the erosion occurred within about 67.5 km of the lake," the study had found.

Vulnerable Himalayas

Azam said the entire Himalayan region was "out of balance entirely" because of population pressure and climate change.

"The whole ecosystem is vulnerable. Because of climate change and increasing instances of extreme weather events, newer areas are getting exposed. Earthquakes or heavy rainfall events are quite common, and any of them can trigger these kinds of disasters," he said.

The Himalayan region is also one of the most dangerous places for earthquakes, recording some of the biggest temblors in the past. Nepal itself was the victim of a 7.2 magnitude earthquake in 2015.

The only way to minimise the damage from such events is to install early warning systems, prepare evacuation plans, and strictly monitor and regulate construction and other activities in the ecologically fragile region so that further instability is avoided.

After the Sikkim disaster, the NDMA had initiated a National GLOF Risk Mitigation Programme (NGRMP) seeking to install early warning systems at glacial lakes at high risk of facing a breach. The Rs 150-crore programme is targeting connecting 195 glacial lakes in Sikkim, Uttarakhand, Arunachal Pradesh, Himachal Pradesh and the Union Territories of Jammu and Kashmir and Ladakh with early warning systems.

• DIPLOMACY

India-China boundary talks: Some progress, but a long road ahead



EXPERT EXPLAINS

SUJAN CHINOY

DIRECTOR GENERAL, MANOHAR PARRIKAR INSTITUTE FOR DEFENCE STUDIES AND ANALYSES

THE EIGHT-POINT consensus reached at the 25th round of talks between Special Representatives (SRs) Ajit Doval and his Chinese counterpart Wang Yi in Beijing is a welcome step ahead of the expected visit of President Xi Jinping to India for the BRICS Summit.

Some of the outcomes concern the maintenance of peace and tranquillity in the border areas, and advancing negotiations on a framework for the settlement of the boundary question in accordance with previous agreements. There is a specific reference to advancing discussions through an Expert Group and Working Group respectively, to explore an "early harvest" of boundary delimitation in appropriate sectors, and effective border management.

Last year, there was agreement in principle on working towards setting up additional General-Level Mechanisms/Senior

Highest Military Commander (SHMC) meetings in the Eastern and Middle sectors akin to the existing mechanism in the Western sector at Chushul/Moldo.

This time, the two sides agreed to implement that understanding along with establishing two hotlines in the Eastern and Middle Sectors. Going forward, the implementation will have to be handled carefully.

The past as prologue

In 1992, the Joint Working Group (JWG) on the Boundary Question decided on confidence building measures (CBMs) such as border personnel meetings (BPMs), complementing forward movement on border trade.

A sub-group of the JWG was created following the border peace and tranquillity agreement (BPTA) of 1993 — the India-China Expert Group of Diplomatic and Military Officials (EG), a precursor to the Working Mechanism for Consultation and Coordination on India-China Border Affairs (WMCC), an institutional mechanism for border management set up in 2012.

After the success achieved in 1995 on disengagement at Sumdorong Chu (along the India-China Line of Actual Control in Arunachal Pradesh), Lipulekh (Middle Sector) and Dichu (Eastern Sector) were subsequently identified as additional military meeting points. The plan for BPMs at Lipulekh was abandoned due to lack of infra-



structure and adverse weather conditions. A trial meeting at Dichu in the Kibithu sector in Arunachal Pradesh was finalised. Dichu is a sensitive area in Anjaw district, and the site of a famous battle in 1962 at Hill 100, in which the Kumaon Regiment did the Indian Army proud. The site chosen for the BPM on Madan Ridge proved contentious. No further meetings could take place.

It was not until 2014 that the proposal for additional points for BPMs was revived. Eventually, it was decided to have regular BPMs at Wacha/Kibithu in the same sector opposite Damai on the Chinese side, in addition to existing venues across Bum La in

Arunachal Pradesh and Nathu La in Sikkim.

Together with BPMs across the Lungnak Lungpa stream at Daulat Beg Oldie (DBO) and Tianwendian (TWD) in the Chip Chap valley, and at the Chushul-Moldo meeting point in the Spanggur Gap, these have contributed to the two militaries maintaining direct contact.

Additional meetings would further the cause of peace.

Existing hotlines at DBO and Chushul, some informal communication at Demchok in the Western Sector, and similar hotlines at Nathu La (Sikkim) and Bum La and Kibithu in the Eastern Sector have pro-

• The LAC's sectors

THE LINE OF ACTUAL CONTROL separates Indian-controlled territory from Chinese-controlled territory.

IT IS DIVIDED INTO into three sectors: the Eastern Sector (Arunachal Pradesh and Sikkim), Middle Sector (Uttarakhand and Himachal Pradesh) and Western Sector (Ladakh).

NSA Ajit Doval and Chinese Foreign Minister Wang Yi at the 25th Meeting of Special Representatives in Beijing on Tuesday. ANI

The road ahead

The SRs are working to realise the consensus reached between Prime Minister Narendra Modi and President Xi at Kazan in October 2024 and at Tianjin in August 2025 on improving ties.

Recent developments such as the resumption of the Kailash Mansarovar Yatra, direct flights, and border trade are mean-

ingful steps in the right direction.

However, the road ahead, especially on the task of "early and substantial harvest of boundary delimitation and border management" may be long and arduous, requiring patient negotiations. It would be premature to suggest that substantive boundary delimitation has already begun in earnest. After all, the Expert Group and Working Group under the WMCC are now explicitly tasked with finalising their respective Terms of Reference. That means the framework is being created and the process is being activated incrementally.

There is also the issue of making piecemeal progress as against a more holistic settlement of differences along the Line of Actual Control. Neither the Sikkim sub-sector nor the Middle Sector are free from the burden of differences. The negotiators must be empowered to engage in meaningful discussions. They must have sufficient experience in handling a matter that has proved vexatious for previous generations.

If taken in the right direction, the guidance provided by the political leadership can lead to lasting peace and offer a window for substantive cooperation between two large and populous neighbours in an era of global flux.

(The author was head of the Indian side in the Expert Group of Diplomatic and Military Officials negotiating with China between 1996 and 2000)

THE CEA RECENTLY CALLED FOR A LOWER ETHANOL-PETROL BLEND OPTION

‘No reversal to E10, choice for old vehicles being explored’

Sukalp Sharma
New Delhi, August 27

AMID THE public debate around E20 petrol — 80% petrol and 20% ethanol — being the only standard petrol variant in the country, the option of additionally offering petrol with 10% ethanol blending, or E10, is being explored specifically for older vehicles, Sanjay Khanna, chairman of the country’s second-largest fuel retailer Bharat Petroleum (BPCL), said Thursday in an interaction with reporters.

But no concrete decision has been taken yet as discussions have been taken yet as discussions supply chain and logistical challenges that selling two variants of base fuel are likely to pose.

Khanna also said that there is no proposal to fully replace the E20 blend with E10.

“One of the options being explored is can we have E10 fuel for the older vehicles, which is what is being pursued right now. What are the challenges related to the supply, can we handle another grade of MS (motor spirit, or petrol) simultaneously? Yes, those challenges are there and they are being debated, they are being worked out right now. That is the reason why we don’t have

• THE E20 DEBATE

INDIA ACHIEVED 20% ethanol blending in petrol last year, five years ahead of the deadline

THERE HAS been opposition over the E20 fuel from various quarters, with claims ranging from notable reduction in mileage and engine component wear in older vehicles

ON ITS part, the government has been trying to allay fears, saying that the drop in mileage in older vehicles would be 3-5% at most,



and would be outweighed by E20’s benefits as it is a superior fuel

any ready answer. But definitely, it was one of the options that was being pursued. In what form it would come, to what extent it would come, the details are being worked out at this juncture at different levels,” Khanna said in response to a question from *The Indian Express*.

On August 19, *The Indian Express* had reported quoting sources that early exploratory discussions within the government and the industry were underway on whether E10 petrol can also be retailed for older vehicles alongside the E20 fuel. Any decision on the matter

is likely to be taken at the government level, and will be binding on all fuel retailers.

India achieved 20% ethanol blending in petrol last year, five years ahead of the ordinal deadline. There has been opposition over the E20 fuel from various quarters, with claims ranging from notable reduction in mileage and engine component wear in older vehicles whose engines were not designed for higher ethanol blends.

On its part, the government has been attempting to allay fears, saying that the drop in mileage in older vehicles would

be 3-5% at most, and would be outweighed by E20’s benefits as it is a superior fuel.

It has also consistently rejected claims that E20 fuel could damage engine components. Questions have also been raised on why motorists aren’t being offered the choice of pure petrol, E10, and E20 fuels. According to sources in the know, the discussions — described as preliminary — are being held on various technical as well as non-technical aspects of the country’s complex fuel retail supply chain.

They said that the backlash from certain quarters against E20 and the lack of choice for consumers, specifically those with older vehicles — particularly two-wheelers — that were certified for E10 petrol, led to the initiation of these discussions.

In July, the government had said that offering multiple grades of base fuel across the country would create an “enormous logistical challenge”, apart from raising costs and reducing operational efficiencies in India’s complex fuel retail network. It also said that the current base fuel E20 is cleaner and superior than pure petrol and lower ethanol-petrol blends.

FULL REPORT ON WWW.INDIANEXPRESS.COM

FM: Closer India-Canada economic ties important amid global uncertainty

Press Trust of India
Washington, August 27

CLOSER ECONOMIC cooperation between India and Canada has assumed greater significance amid a rapidly changing global landscape marked by geopolitical uncertainty, Union Finance Minister Nirmala Sitharaman said, calling for stronger partnerships to build resilient, sustainable and inclusive economies.

“The world is going through a profound transformation. There’s just a lot of uncertainty everywhere. And the geopolitical and economic realities are constantly evolving,” Sitharaman said while addressing a joint briefing after the inaugural Economic and Financial Dialogue between India and Canada at Toronto.

Against this backdrop, she said closer economic cooperation between the two countries would be important to build resilient, sustainable and inclusive



Finance Minister Nirmala Sitharaman with François-Philippe Champagne, Minister of Finance & National Revenue of Canada, in Toronto. PHOTO CREDIT: MINISTRY OF FINANCE

ive economies in both Canada and India. Her remarks come amid evolving global economic and geopolitical conditions that have heightened the need for greater international cooperation to strengthen economic resilience and promote inclusive growth. Sitharaman further said the economic and financial

dialogue between India and Canada reflects the shared ambition to move beyond traditional trade in goods and services and build a deeper economic partnership encompassing investment, finance, capital markets and regulatory cooperation.

Prime Minister Narendra

Modi and his Canadian counterpart have set an ambitious goal for strengthening bilateral ties, giving fresh momentum and strategic direction to the relationship, she said. The discussions with her counterpart François-Philippe Champagne covered three broad areas: macroeconomic developments and domestic policy priorities in both countries; practical avenues for financial-sector cooperation; and broader international and multilateral cooperation on issues of shared interest. Highlighting that India has demonstrated “remarkable macroeconomic resilience”, she said the complementarities between the two economies, along with considerable scope for expanding investment and economic cooperation.

On financial-sector cooperation, she said the two sides explored areas including cross-border payments, financial stability, fintech and capital markets.

S&P affirms ‘BBB’ rating on India; cites infra push, policy stability

Reuters
Bengaluru, August 27

GLOBAL RATINGS agency S&P on Thursday affirmed India’s sovereign ratings at “BBB/A-2” with a “stable” outlook, citing continued policy stability and high infrastructure investment that supports the country’s long-term growth prospects.

The affirmation comes despite risks from higher energy prices, which could strain India’s external balances and inflation outlook given its heavy reliance on imported crude oil. S&P estimates India’s real GDP growth to ease slightly to 6.6% this year, a pace it said remains strong compared with most emerging-market peers amid a broad global slowdown.

Gadkari: India’s EV market to hit Rs 20L cr by 2030

New Delhi: India’s electric vehicle (EV) market is expected to grow to Rs 20 lakh crore by 2030, with the potential to create five crore jobs, Union Minister Nitin Gadkari said on Wednesday.

Addressing a summit organised by the CII-ITC Centre of Excellence for Sustainable Development, Gadkari said that currently 57 lakh electric vehicles are registered in India, with 7% market penetration. “India’s electric vehicle (EV) market will be worth Rs 20 lakh crore by 2030. It will also create five crore jobs by 2030,” he said.

The road transport and highways minister highlighted that India’s two largest two-wheeler vehicle manufacturers, Bajaj Auto and Hero MotoCorp, export more than 50% of vehicles they produce. PTI

SIA to ‘carefully consider’ Air India’s cash infusion pleas

ENS Economic Bureau
New Delhi, August 27

THE BOARD of Singapore Airlines (SIA), which owns 25.1% stake in Air India, will carefully consider any request from the latter for additional capital infusion after considering the SIA group’s other capital requirements as well as Air India’s overall business strategy, the city state’s flag carrier said Thursday.

The comments come amid the loss-making Air India seeking capital infusion from its shareholders Tata Sons and SIA, which has also led to concerns being raised by a member of parliament (MP) in Singapore.

Air India, which is implementing an ambitious and cash-guzzling transformation programme, is also struggling due to external headwinds like the Pakistani airspace closure, West Asia conflict-related disruptions, and sky high fuel prices. The airline recently sought about \$1.5 billion from its shareholders, it is learnt.

“As a significant minority shareholder, Singapore Airlines works with Tata Sons to support Air India’s transformation programme. SIA’s Board will carefully consider any requests for additional capital from Air India, taking into consideration the Group’s other capital requirements and Air

India’s business strategy,” an SIA spokesperson said.

“The SIA Group’s capital allocation follows a disciplined evaluation process that considers its operating cash flow, investment requirements in new aircraft and products, as well as multi-hub investments such as Air India, to support sustainable long-term growth and returns,” he added. In a social media post on Wednesday, Kenneth Tiong, an opposition MP in Singapore’s parliament, raised concerns over Singapore Airlines investing further in Air India, and the consequent impact it could have on Temasek, the Singapore government-owned global investment company that in turn owns Singapore Airlines. “Singapore Airlines owns about a quarter of it (Air India), and Temasek owns most of Singapore Airlines, so this is not only a question for private shareholders. Whichever of the two writes the cheque, it will have a significant impact on Temasek...No one, least of all Singaporeans, owes Air India a living. I will not support, nor expect, any future use of Temasek’s funds to prop up Air India via Singapore Airlines. If Singapore Airlines wants to continue its bet on Air India, it should do so on its own two feet, and not on Temasek’s,” Tiong said.

FULL REPORT ON WWW.INDIANEXPRESS.COM

Subhash Chandra case: HDFC Bank eyes NCLAT over Rs 6.5 crore order

George Mathew
Mumbai, August 27

HDFC Bank is “exploring an appeal” against an National Company Law Tribunal (NCLT) order approving a repayment plan for Essel Group founder Subhash Chandra that entails a substantive haircut on creditors’ admitted claims.

The NCLT has approved Chandra’s proposal to pay Rs 6.25 crore against total guarantees signed for Rs 22,000 crore.

HDFC Bank said its admitted claim accounted for 3.2% of the total claims and that it was inherited from erstwhile HDFC Ltd prior to the merger of the two entities. The NCLT verdict saved the case from going into bankruptcy. The proceedings concern personal guarantees given by Chandra for borrowings of Essel Group-linked companies. When a promoter gives a personal guarantee for corporate loans, the lender can, subject to the applicable legal process, pursue the guarantor when the underlying borrower defaults. Chandra’s insolvency proceedings were initiated in 2024 following a petition by Indiabulls Housing Finance.

The case therefore goes beyond Zee Entertainment Enterprises. It concerns Chandra’s personal liability arising from guarantees linked to corporate debt. There is a separate corporate insolvency proceedings involving companies associated with the Essel Group, or with regulatory proceedings involving Zee Entertainment and its executives. “Total claim against Subhash Chandra as a personal guarantor, in the personal insolvency proceedings is only Rs 3992 crore by the objectors of the plan and not Rs 22,000 crore,” Subhash Chandra’s office said in a press statement issued on Thursday. “Out of which, also a claim of Rs 620 crore settled and further Rs 1,063 crore offered to be paid by the borrower entities. The borrowing entities for whom Chandra has provided personal guarantees have till date repaid Rs 43,000 crore. The borrowing entities have assured to settle any other amount which might have left,” it said.

“He (Subhash Chandra) declared his total assets stood at Rs

39.08 crore which he declared in the Parliament of India in 2016, which is a public record. How could a bank take/accept his net worth of Rs 45,888 crore in 2017?” the statement said.

“His personal net worth came down to Rs 31.79 crore in 2024 from Rs 39.08 crore in 2016,” it said. The August 25 order was not the result of a straightforward unanimous decision. A two-member NCLT bench had earlier delivered a split verdict on the repayment plan. With the members divided, Nitesh Sharma, judicial member of the NCLT, acted as the third member to resolve the disagreement.

The third member ultimately sided with approval of the repayment plan. Creditors had mounted strong objections, particularly over the extraordinarily low amount they were being offered. But the tribunal concluded that the objections did not provide sufficient legal grounds to reject the plan. The tribunal reviewed the available financial information and concluded that the approved repayment plan could yield a better outcome than forcing the matter into

bankruptcy. Put simply, the reasoning was pragmatic: recovering Rs 6.5 crore could be preferable to the potentially lower returns from liquidation or bankruptcy.

The creditors’ objection centred on the extraordinarily low recovery. Creditors also questioned whether the debtor’s assets and financial affairs had been examined deeply enough, including whether a forensic investigation should have been conducted. The tribunal, however, did not accept the argument that a forensic investigation was an essential precondition for approving the repayment plan.

The NCLT also emphasised the importance of the commercial decision of creditors. Where creditors have voted on a plan in accordance with the IBC, the tribunal does not ordinarily substitute its own commercial assessment for that decision.

The repayment plan had secured the requisite support from creditors, reportedly receiving approximately 80.81% of the voting share. FULL REPORT ON WWW.INDIANEXPRESS.COM

BEFORE THE NATIONAL COMPANY LAW TRIBUNAL
AHMEDABAD BENCH, AHMEDABAD
C.A. (CAA)/ 33 (AHM) 2026
In the matter of Sections 230 to 232 read with other applicable provisions of the Companies Act, 2013 and
In the matter of Scheme of Amalgamation of
ACC Limited ("Amalgamating Company") with
Ambuja Cements Limited ("Amalgamated Company")

ACC LIMITED,
a company incorporated under the provisions of the Indian Companies Act, 1913, and having its registered office at Adani Corporate House, Shantigram, Near Vaishno Devi Circle, S. G. Highway, Khodiyar, Ahmedabad, Gujarat – 382 421, India.
CIN: L26940GJ1936PLC149771

... APPLICANT NO. 1 /
AMALGAMATING COMPANY

NOTICE AND ADVERTISEMENT OF NOTICE OF THE MEETING OF THE EQUITY SHAREHOLDERS
(WHICH CONSIST OF PUBLIC SHAREHOLDERS)

Notice is hereby given that by an order dated July 29, 2026 ("Order"), the Hon'ble National Company Law Tribunal, Ahmedabad Bench ("Hon'ble Tribunal") has directed convening of the meeting of the equity shareholders of ACC Limited (hereinafter referred to as the "Amalgamating Company"), for the purpose of considering, and if thought fit, approving the arrangement embodied in the Scheme of Amalgamation of the Amalgamating Company with Ambuja Cements Limited (hereinafter referred to as the "Scheme") pursuant to the provisions of Sections 230-232 of the Companies Act, 2013 ("Act") and other applicable provisions thereof and applicable rules thereunder.
In pursuance of the Order passed by the Hon'ble Tribunal and as directed therein, further Notice is hereby given that a meeting of the equity shareholders of the Amalgamating Company will be held on, Tuesday, September 29, 2026 at 10:30 a.m. (1030 hours) IST through Video Conferencing ("VC")/Other Audio Visual Means ("OAVM") (hereinafter referred to as the "Meeting") in compliance with the applicable laws including circulars issued by the Ministry of Corporate Affairs ("MCA Circulars") from time to time and the Circular No. SEBI/HO/CFD/CFD-PoD-2/P/CIR/2024/133 dated October 3, 2024, issued by the Securities and Exchange Board of India ("Circular issued by SEBI") and the said equity shareholders are requested to attend the Meeting.
The Amalgamating Company has completed the electronic dispatch of the Notice of the Meeting dated August 20, 2026; the explanatory statement as required under Sections 230(3), 232 (1) and (2) and 102 of the Act read with Rule 6 of Companies (Compromises, Arrangements and Amalgamations) Rules, 2016; and the annexures to the explanatory statement which includes the Scheme (collectively referred to as "Particulars") on August 27, 2026, through e-mail. The Particulars were sent through electronic mode to those equity shareholders whose e-mail addresses are registered with Kfint Technologies Limited, the Amalgamating Company's Registrar and Transfer Agent (hereinafter referred to as "Kfint")/depositories/Amalgamating Company and whose names appear in the register of members/list of beneficial owners as on Friday, August 14, 2026. The Particulars are placed on the website of the Amalgamating Company and can be accessed at www.acclimited.com and are also available on the websites of National Stock Exchange of India Limited at www.nseindia.com; Bombay Stock Exchange Limited at www.bseindia.com; Central Depository Services (India) Limited ("CDSL") at www.evotingindia.com; and Kfint at https://cfirm.kfintech.com/bmails/files/24982_ACC_Merger_R1.pdf.
If so desired, copy of the particulars can be obtained free of charge, between 10:30 a.m. to 12:30 p.m. on all working days up to one day prior to the date of the Meeting at the registered office of the Amalgamating Company, or from the office of its advocates, M/s. Singhi & Co., Singhi House, 1, Magnet Corporate Park, Off Sola Bridge, S. G. Highway, Ahmedabad – 380 059, Gujarat, India or by sending a request along with the details of shareholding to the Amalgamating Company by email at acc-investorsupport@adani.com.
Since, the Meeting is being held pursuant to the Order passed by the Hon'ble Tribunal and in compliance of MCA Circulars and Circular issued by SEBI through VC/OAVM, physical attendance of the equity shareholders has been dispensed with. Accordingly, the facility for appointment of proxy by the equity shareholders of the Amalgamating Company is not available at this Meeting.
The Hon'ble Tribunal has appointed Justice Mr. Virendra Singh Gyan Singh Bisht, former member of the National Company Law Tribunal, to be the Chairman of the Meeting.
Mr. Anil S Kadril, Advocate, or in his absence, CS Raimeen Maradiya, Partner, Chirag Shah and Associates, Practicing Company Secretary (Membership No. 11283 & C.P. No. 17554), has been appointed as the scrutintizer to scrutinize the e-voting during the Meeting and the remote e-voting process.
The Scheme, if approved by the equity shareholders will be subject to subsequent approval of the Hon'ble Tribunal and such other regulatory approvals as may be necessary.
NOTICE is further given that:
1. The Amalgamating Company has provided remote e-voting facility to its equity shareholders to enable them to cast their votes electronically and has availed the services of CDSL for providing VC/OAVM facility, remote e-voting and e-voting during the Meeting. Some of the important details regarding remote e-voting are provided below:

EVSN	260824011
Commencement of remote e-voting period	Thursday, September 24, 2026 at 9:00 a.m. IST (0900 hours)
End of remote e-voting period	Monday, September 28, 2026 at 5:00 p.m. IST (1700 hours) The remote e-voting module will be disabled by CDSL thereafter.

2. The e-voting facility will also be made available during the Meeting to enable the equity shareholders who have not cast their vote through remote e-voting, to exercise their voting rights. Equity shareholders who have cast their vote through remote e-voting prior to the Meeting may attend the Meeting but shall not be entitled to cast their vote again.

3. An equity shareholder, whose name is recorded in the register of members or in the list of beneficial owners maintained by Kfint/depositories/Amalgamating Company as on the cut-off date, i.e. Tuesday, September 22, 2026, only shall be entitled to exercise his/her/its voting rights on the resolution proposed in the Notice and attend the Meeting of the equity shareholders. The voting rights of the equity shareholders of the Amalgamating Company shall be in proportion to their share in the paid-up equity share capital of the Amalgamating Company as on cut-off date i.e. Tuesday, September 22, 2026.

4. The Scheme shall be acted upon if a majority of persons representing three-fourth in value of the equity shareholders of the Amalgamating Company voting through remote e-voting and e-voting during the Meeting approve the Scheme, in terms of the provisions of Sections 230-232 of the Act.

5. Further, in accordance with Master Circular No. SEBI/HO/CFD/POD-2/P/CIR/2023/93 dated June 20, 2023 issued by Securities and Exchange Board of India, the Scheme shall be acted upon only if the number of votes cast by the public shareholders (through remote e-voting and e-voting during the Meeting) in favour of the Scheme is more than the number of votes cast by the public shareholders against it.

6. The results, together with the scrutintizer's report, will be displayed at the registered office and on the website of the Amalgamating Company and on the website of CDSL at www.evotingindia.com and shall be communicated to National Stock Exchange of India Limited and to BSE Limited on or before Thursday, October 1, 2026.

7. Information and instructions for attending the Meeting including manner of voting (both remote e-voting and e-voting at the Meeting) by the equity shareholders holding shares in dematerialised mode, physical mode and for equity shareholders who have not registered their e-mail address has been provided in the Notice of the Meeting. The manner in which (a) person who becomes an equity shareholder of the Amalgamating Company after dispatch of the Notice and holding equity shares as on cut-off date (mentioned herein above); (b) equity shareholders who have forgotten the User ID and Password, can obtain/generate the User ID and password, has also been provided in the Notice of the Meeting.

8. Equity shareholders holding equity shares in physical mode, who have not registered/updated their e-mail address with the Amalgamating Company, are requested to register/update their e-mail address by submitting Form ISR-1 (available on the website of the Amalgamating Company at <https://www.acclimited.com/investors/shareholders-information> duly filled and signed along with requisite supporting documents to Kfint at enward_ris@kfintech.com.

9. Equity shareholders holding equity shares in dematerialised mode, who have not registered/updated their e-mail address with their depository participant(s), are requested to register/update their e-mail address with the depository participant(s) where they maintain their demat accounts.

10. Equity shareholders seeking any information with regard to the Scheme or the matter proposed to be considered at the aforesaid Meeting, are requested to write to the Amalgamating Company atleast 3 (three) days before the date of the Meeting through e-mail on acc-investorsupport@adani.com.

11. In case of any difficulty or queries in connection with attending the Meeting through VC/OAVM or casting vote through remote e-voting facility, equity shareholders may contact:

For	Name & Designation	E-mail	Address	Contact No.
E-voting	Mr. Rakesh Dalvi, Sr. Manager (CDSL)	helpdesk.evoting@cdslindia.com	Central Depository Services (India) Limited, A Wing, 25th Floor, Marathon Futurex, Mafatal Mill Compounds, N.M. Joshi Marg, Lower Parel (East), Mumbai – 400 013	1800 21 09911
VC/OAVM				

Sd/-
Justice Mr. Virendra Singh Gyan Singh Bisht,
former member of the National Company Law Tribunal,
Chairman appointed for the Meeting

Dated: August 27, 2026

Sensex	NIFTY	Gold ▼	US Dollar ▲
76,933.59	24,090.85	₹1,58,386	₹95.54
-539.35	-116.90		
-0.70%	-0.48%	Silver ▼	Oil ▼
		₹2,39,500	\$88.17
NOTE: GOLD, SILVER RATES AS PER INDIA BULLION AND JEWELLERS ASSOCIATION GOLD PER 10G, SILVER PER 1KG; CRUDE OIL (INDIAN BASKET) AS OF AUGUST 26, 2026			

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IPO Fever Gives Way To Reason

Cautious investors could curb froth

Retail investors are becoming more discerning in the IPO market, a salutary development after a multi-year bull run. Nearly 1/3rd of the 42 mainboard IPOs launched in 2026 have seen the retail portion undersubscribed, suggesting that indiscriminate enthusiasm may be giving way to greater scrutiny. The IPO pipeline has widened, but the listings market has also undergone a structural shift, with foreign investors sitting out issues carrying fancy valuations. Domestic institutional investors, meanwhile, are seeking larger allotments and helping the market discriminate between issues based on business prospects. Some companies, too, are pricing their issues more soberly. These are signs of a maturing IPO market, which has long drawn criticism for aggressive pricing.

A majority of retail investors sell their IPO shares within a week of listing. This can weaken post-listing performance while increasing the risk of losses for subscribers at the tail end of a primary-market bull run. Aggressive pricing also squeezes listing-day gains for retail investors, who largely drive sentiment in the IPO segment. As retail investors turn cautious, the risk of primary- and secondary-market valuations decoupling diminishes. The primary market is inherently less precise in price discovery, making a more efficient mechanism beneficial to companies, investors and regulators alike.

The Indian equity market has a natural appetite for quality paper, but that appetite could suffer if investor fatigue sets in and companies are forced to temper their IPO ambitions. Fortunately, discernment appears to have set in before fatigue. A smoother IPO cycle could leave adequate value on the table for sentiment to play a constructive role. The Indian economy offers stable, high growth that can justify IPO valuations at the higher end. The range of companies planning IPOs has also diversified well beyond technology, lowering concentration risk and adding stability. Diverse supply and realistic pricing should make the segment more robust.

Furlough Should Not Be a Free Pass

Rape convict and Dera Sacha Sauda chief Gurmeet Ram Rahim Singh walked out of jail in Haryana earlier this week on a 21-day furlough. This is his 17th temporary release since his conviction in 2017. Singh was convicted of raping two of his disciples and sentenced to 20 yrs in prison. To date, he has spent 435 days outside, excluding the current furlough. Furlough and parole are forms of temporary release, with the former more closely linked to good conduct and rehabilitation, while parole is tied to specific circumstances.

The Prisons Act 1894 empowers states to frame rules on matters including remission, good conduct and the release of prisoners. Haryana's 2022 law allows furlough as an incentive for good conduct. But the Supreme Court has held that furlough is not an absolute legal right. The state law excludes 'hardcore convicted prisoners' from the temporary-release regime, but the term does not encompass every conviction for rape or murder. It specifies categories such as rape with murder, rape or aggravated sexual assault involving a child below 16, gang rape, serial killing and contract killing. Singh's two murder convictions are for criminal conspiracy, which is why he has not been classified as a hardcore prisoner.

Rape, sexual abuse of minors and murder are heinous crimes. Creating exceptions that allow a person convicted of such offences to be treated on a par with those convicted of less heinous crimes risks making a mockery of justice. Ensuring that women are safe and feel safe is a marker of a developed society. Singh was — and continues to be — a person in a position of power. Allowing him 'time out' of prison, even after conviction, sends a chilling message. Rehabilitation is a worthy goal, but it should not come at the cost of justice.

JUST IN JEST

HBS profs are avataring themselves, so why don't you too?

Give Yourself Away The Harvard Way

Harvard Business School has unveiled its latest luxury accessory: AI clones of its faculty, available for the modest sum of \$699. The pitch is startup culture. But the real syllabus is professional redundancy. For what HBS has actually launched is not a course but a template, one that could be applied to every profession under the canopy. Why pay good money to a human to have him write the column you're reading when you can rent his algorithmic ghost for a lower price while keeping up his 'appearance'?

For the HBS case, the irony is delicious. Professors, once gatekeepers of wisdom, now join the likes of electricians, domestic help, plumbers, etc, to render themselves useless by installing AI with their skills. And these avatars won't need coffee breaks, or tenure negotiations. But redundancy need not be tragic. One person's obsolescence is another's liberation. This is capitalism's ultimate remix: the proxy performance of labour, monetised through royalties to the person whose avatar is doing the work, all while the original sips an LIT in the afternoon at home. So, AI professors are not just teaching startup culture. They are teaching us — well, the parents paying some ₹66,000 a pop — how to outsource ourselves. And in that outsourcing lies the most profitable startup of all: the business of being absent, and simply giving oneself away.

Canadian sovereignty will depend on the range of trade partners, India included, it can cultivate

ANOTHA KINDA CANADA?



Arnie Guha

Toronto: The Canadian idea of citizenship rests on its promise to contribute to a shared set of societal values. That promise has been mostly tested at the border: whom do we let in? On what terms? But this year, it's being tested in a different theatre altogether. Canada is now in a trade war with the one country it has trusted so completely, for so long, that it rarely had to ask what that trust was worth.

The trade war between Canada and the US began in Feb 2025. It has since escalated sharply. Talks collapsed last week after Washington introduced demands Ottawa considered economically damaging and incompatible with its sovereignty. Last Saturday, Donald Trump announced 50% tariffs on C\$27.6 bn (about US\$19.9 bn) of Canadian goods, including products that comply with the existing continental trade agreement. On Tuesday, PM Mark Carney announced counter-tariffs of equivalent value. Asked whether this amounted to a trade war, Carney was blunt: 'You are at war when you are attacked. We were attacked.'

The deeper subject is an older one, familiar to any country shaped by empire. A nation can be constitutionally sovereign while depending on another power for its markets, capital and defence. That dependence stays invisible for decades, until the stronger country turns it into leverage.

Canada is discovering the distance between possessing a flag and possessing freedom of action. The numbers describe how deep that dependence still runs. Even after a year of tariffs and

At Davos in Jan, Carney said: Diversification is a 'material foundation for honest foreign policy'. So, why has Canada's menu of choices for deep trading relationships remained so narrow?



Look, other options

rupture. 71.7% of Canadian goods exports still went to the US in 2025. This is the lowest share since the early 1980s. But still, it's an overwhelming concentration of exports in a single market.

Diversification has become the word du jour. At Davos in Jan, Carney explained why. Diversification, he said, is 'a material foundation for honest foreign policy', since a country earns the right to take a principled stand only once it has reduced its exposure to retaliation. It is a clean argument for spreading risk. So, why has Canada's menu of choices for deep trading relationships remained so narrow?

Geography explains the relationship with the US, where proximity has always functioned as destiny. The rest of the world offers no such alibi. Is something other than distance influencing Canada's options today?

China, a relationship Ottawa treats with open wariness, is still Canada's second-largest single-country trading partner; with bilateral merchandise trade of roughly C\$119 bn (about US\$85.7 bn) in 2024. Yet, Ottawa has rarely approached China with the institutional familiarity it extends to partners in the Anglosphere and Northern Europe. When Ottawa did make a gesture toward Beijing this Jan, in what Carney described as a 'landmark' deal, it amounted to a tariff exemption for only 49,000 Chinese-made EVs a year. That represents under 3% of the Canadian market. Even that modest opening drew immediate politi-

cal backlash at home.

With China, Canada's reasons for hesitation are spoken aloud: IP theft, fear of another 'China Shock', and hollowing out of manufacturing towns and en-

A Canada-India trade deal paused in 2023 has only this year produced ToR, with both targeting US\$50 bn in trade by 2030 — a figure that underscores how far the relationship has fallen short of its potential

tire communities, not to mention another hegemon seeking hyperpower status in a conflict-tangled world.

India presents a more complicated case. Here's a market of nearly 1.5 bn people, a fellow democracy and G20 economy, and a Commonwealth partner with a shared history in two world wars. It holds tremendous complementary potential for Canadian technology, agriculture, education and healthcare. Yet, in 2025, two-way merchandise trade amounted to an underwhelming C\$10.9 bn (about US\$7.85 bn). The figures establish the scale of underperformance, though not its cause. India's trade barriers, Canada's continental economic structure, and the diplomatic rupture of 2023 all matter. But they don't fully explain why a relationship with such evident complementarities remained strategically peripheral for so long.

A trade agreement between Canada and India was paused in 2023, and has only this year produced terms of reference, with both governments now talk-

ing about reaching US\$50 bn in trade by 2030. It's a target that serves to emphasise how far below potential that relationship has sat.

In June, German firm TKMS executive Philipp Schön, bidding against South Korea's Hanwha for a Canadian submarine contract, urged Ottawa to weigh which 'cultural ecosystem' it wanted to join. He pointed to a common working language and shared cultural ecosystem as forms of infrastructure in a decades-long defence partnership.

Schön was talking about English fluency among his engineers. But he was also naming a test that seems to quietly guide Canada's choice of partners: whom do we trust enough to understand us, our values, so completely, so intuitively, that we can throw open the doors to a possible marriage? The executive's language may be dismissed as a bidder's salesmanship. But that makes it more revealing in one respect: he evidently believed cultural familiarity would strengthen his case before Cana-



dian decision-makers.

In public discussions of diversification, capability and price are debated endlessly. The prior question of eligibility receives far less attention: which countries feel sufficiently familiar to be trusted with the infrastructure of Canadian sovereignty? Can the country extend its map of strategic trust beyond its inherited cultural perimeter? Should cultural familiarity count as strategic infrastructure?

Solidarity built on historical grievance and geographic familiarity comes easily. Solidarity built on chosen principle must be forged under pressure. Canada's test was never only external. It is whether a country that defines itself by civic inclusion at home can resist the temptation to retreat into an Anglo-European comfort zone abroad. Canada's sovereignty will depend on the range of partners it can cultivate.

The writer is chair, advisory board, Green College, University of British Columbia, Canada



THE SPEAKING TREE

Krishn's Bliss

AK JAGANNATHAN

Man suffers; God is in eternal bliss. Misery and turmoil are part of worldly existence, while bliss reigns in Vaikunth, Krishn's abode. The soul longs for union with the Supreme Soul. God, ever blissful, descends into the world to uphold righteousness and destroy evil. The living being, composed of prakriti, is matter. Man goes to the temple, offers flowers and vas-tra, and offers prayers to the deity representing God. The body eventually dies and dissolves into matter. Krishn, the Supreme, transcends the three gunas of maya. He is Divine.

Matter, the embodied soul, reaches God's transcendental abode by attaining moksh. Krishn was born in a prison cell, under threat of death. Raised as a cowherd, he performed acts beyond mortal comprehension, for instance, lifting Govardhan Hill on his little finger to protect the villagers from Indra's wrath.

Krishn tried to prevent the Mahabharata war; negotiating with Duryodhan for just five villages. Duryodhan refused. In battle, Krishn was unarmed, serving as Arjun's charioteer. Here, transcendence revealed itself. In the Vishwarup Darshan, Krishn showed Arjun that the Kaurav warriors were already slain, and Arjun was but an instrument of God. Matter and transcendence met in this revelation — Krishn as cousin, friend and charioteer, yet Supreme. By following any of the hundred-plus pathways to moksh in Gita, man crosses the ocean of samsara and reaches Vaikunth, the realm of divine bliss. Matter and the Divine are intertwined forever.



ALGO OF BLISSTECH

The Daily Crossword

There's a joy in staring down a grid of empty squares, armed only with a pencil and a stubborn streak. The daily crossword is less a puzzle than a ritual, a duel between wit and wordplay fought in the quiet corners of morning. Each clue is a sly wink, a riddle wrapped in brevity, daring you to untangle its secret.

The bliss lies not in speed but in surrender. One begins with certainty — 'four-letter word for feline' — and soon tumbles into linguistic labyrinths where



ere 'bank' could mean river's edge or financial fortress. The crossword teaches humility: you are never as clever as you think, yet always cleverer than you fear.

There is joy in the rhythm too. Black squares form a mosaic of order; a geometry of patience. Filling them is like threading pearls onto a string — each answer clicks into place, and the grid hums with completion. Satisfaction of the final word is disproportionate to its size: a tiny triumph, a private coronation.

And then comes the afterglow. To solve a crossword is to sip from a fountain of wit, to dance with language, and to discover that bliss can be spelled out, one square at a time.

Chat Room

Blowing Hot, Blowing Cold

Apropos 'Planet Ablaze'? Think Again' by Björn Lomborg (Aug 27), public discussion on climate change should be based on evidence rather than either complacency or exaggerated claims. Questioning inaccurate predictions does not mean dismissing genuine environmental risks. The challenge is to communicate scientific uncertainty honestly while acting on well-established concerns. Governments should focus on practical measures such as clean energy, water conservation, resilient infrastructure and protection of vulnerable communities. Sound policy requires careful science, transparent data and long-term planning, not alarmism or denial.

BA Neboba
Perundurai, Tamil Nadu

Don't Stay Deaf to Bhote Koshi



Brabim Karki

Kathmandu: On Wednesday, a flash flood tore through the towns of Timure and Syabrubesi in Nepal's Rasuwa district and sent a wall of water down the Bhote Koshi river into the Trishuli. More than 350 people were killed, and hundreds, including 288 Indian nationals — most of whom are pilgrims on the Kailash Mansarovar route through Rasuwagadhi, the main overland crossing into Tibet — are missing.

Even as search and rescue continue, the uncomfortable fact sitting upstream of both countries remains: Bhote Koshi has wreaked havoc now twice in 14 mths, and nothing about how it is monitored has changed in between.

The flood in July 2025 originated from Tibet's Lhende stream, killing at least 9 people and leaving 19 missing, swept away the Miteri Bridge connecting Nepal and China, and damaged the Rasuwagadhi dry port, along with ne-

arby hydropower projects. It also shut down Nepal's main overland trading route with China for months. The remarkable thing about this week's flood is how little has changed in response since then.

The flash flood may have originated in a glacial lake outburst upstream in Tibet. There has been no rainfall in the affected districts. Nepal's Department of Hydrology and Meteorology is working with local administrative offices and Chinese counterparts to examine satellite data and establish a cause.

But Nepal's vulnerability on Bhote Koshi is not primarily a story about climate or geography. It's a story about absence of a standing, real-time data-sharing arrangement with China covering glacial lakes that feed this river, and about a national response system still built to evacuate people after a flood has already crossed the border.

The upper Bhote Koshi and its tributaries sit inside a belt of glacial lakes on the Tibetan plateau that has been flagged for years as prone to sudden outburst floods — floods that occur without local rainfall and without warning to anyone downstream. Rasuwa has no glacier of its own capable of producing a flood this size, and only light rain fell overnight. The water ca-



Lucky escape

me from somewhere else, and nobody downstream knew it was coming until it arrived.

Hydropower plants along the lower banks were swept away. So was the stretch of road connecting Syabrubesi to the border crossing at Rasuwagadhi, a corridor that was only partially rebuilt after being crippled by last year's flood. Every rupee spent on that reconstruction was a bet that the river would hold. It didn't. Rebuilding the same infrastructure in the same fragile location, without any early-warning system in place, is not resilience but repetition.

The institutional response has looked nearly identical to the one last year: convene, evacuate, wait for information from across the Chinese border. Nepal reacted fast, speed being the only

Off With Offset Training Wheels



Rajiv Roy-Chaudhury

Last month's Public Accounts Committee (PAC) report released in Parliament noted that as of December 2025, nearly 45% (about \$4.5 bn of \$9.9 bn) of defence offset obligations remain unfulfilled. It flagged poor execution and weak monitoring, and called for a review of the offset policy itself.

Earlier, CAG reports had flagged the same issues. PAC also faulted MoD for failing to secure significant tech transfers through offsets. While many concerns are justified, this one isn't. More importantly, with the draft Defence Acquisition Procedure (DAP) 2026 replacing offsets with minimum indigenous content (IC) requirements, the issue is no longer whether offsets worked, but whether India's private sector defence industry, which exported with the help of offsets, can export without it.

India introduced defence offsets into policy in 2005. Offset provisions require foreign vendors of imported defence platforms to either reverse purchase, invest in JV or transfer technology into India for 30% of the spend value. In practice, they chose the simplest route: buying components and sub-assemblies from Indian compa-

es for integration into their global supply chains. PAC observed that from 2007 till March 2018, 90% of value of offsets was contracted to be discharged through direct purchases of products and services. Expecting offsets to deliver any meaningful tech transfers was always unlikely.

By 2016, as domestic procurement was prioritised over global imports, offsets became less relevant and were progressively replaced with higher IC requirements. Offset thresholds were raised nearly 7x in 2016, and in 2020, G2G agreements and single-vendor purchases were exempted. No offset contract has been signed in the past 5 yrs. Draft DAP 2026 contains no offset provisions, and requires IC of up to 30% on global buys.

Effectively, all imports will have a 'Make in India' component. For the Rafale-Marine fighter jets G2G in 2025, Dassault is setting up a Rafale fuselage manufacturing plant in partnership with Tata, and a maintenance, repair and overhaul (MRO) facility on its own. Since India signed its first offset contract with Israel's Elta Systems in 2007, it has signed 56 such contracts, giving Indian industry \$13.2 bn of defence business. 20 offset contracts are completed and closed. Ano-

ther 10 are completed, and under final audit. Of the remaining 26, the ongoing offset obligation of \$9.9 bn is to be met by 2033.

Many large global defence companies have established JVs in India to meet offset obligations, rather than bid for domestic contracts. Lockheed Martin set up its JV with Tata in 2010 to fulfil its 2009 offset obligation on the C-130J military transport aircraft. Similarly, Boeing set up its JV with Tata in 2016 on the 2015 sale of AH-64E Apache helicopters. Dassault and Thales formed JVs with Reliance in 2017 on the 2016 sale of Rafale fighter jets.

As a result, India has more than 350 Indian offset partner (IOP) exporters, of which almost 40% are MSMEs. More than 95% of IOPs are private companies. JVs of Lockheed Martin, Boeing, Dassault and Thales are all IOPs.

India's defence exports have grown 56x from 2013-14 to \$38,424 cr in 2025-26. GoI aims to reach \$50,000 cr by 2029. Paradoxically, while most of India's defence production comes from DPSUs, bulk of its exports are from private companies. Some 145 export defence products to more than 80 countries.

From 2017-18 to 2024-25, the private sector share of defence exports ranged from 57% to 91%. Surprisingly, there is no of-



Cycle on

ficial estimates of how much of this private sector share is attributable to offsets. GoI-sourced data suggests private defence exports cumulatively exceeded \$12 bn since 2010-11. Against this, IOPs claimed \$9.4 bn in discharged offsets through December 2025.

But 2025-26 marked an important reversal. For the first time since 2017-18, private sector share of exports fell below 50%, to 45%. This decline was due to a 151% surge in DPSU exports. However, with pending offset obligations drawing down to less than \$3.2 bn, and no new offset contracts expected, the pipeline that helped Indian private sector companies enter global defence supply chains is steadily running out.

MoD recognised this early. The 2021 C-295 military transport aircraft contract with Airbus permits export of aircraft manufactured in India to other countries, subject to government approval. Draft DAP 2026 explicitly aligns domestic procurement with export potential at the platform level. MoD should build a framework for defence exports through G2G agreements and sovereign guarantees, as it has so successfully used G2G for defence imports.

The offset era is ending. Offsets helped the private sector develop technology, quality and reliability needed to compete globally. The challenge now is to turn those capabilities into an export industry that can stand on its own.

The writer is former strategy director, BAE Systems India

OUR VIEW



How to spot the slippery slope of pack regulation

India's labelling of packages has provoked calls for boldface health warnings that could clash with the liberty of marketers. Here's how the rules could strike an optimal balance

There is a tide in the affairs of state policy, which, taken at the peak, could improve market outcomes. What began years ago as online activism over the safety of the packaged stuff we consume has rallied its way up to the top judiciary. Activists have argued that the Food Safety and Standards Authority of India's (FSSAI) rules for makers of food and beverages retailed in packs are too lax. Earlier this month, the regulator had reportedly rejected the idea of bright warnings on pack fronts, saying that displays of a black-and-white table of sugar, fat and salt content would suffice. Upfront cautions, once found impractical by the FSSAI, have the Supreme Court's favour. The alleged duplicity of marketers has been part of the stir that led up to it. Why, rule-critics asked, do global brands vary input formulas for various markets? Social-media chatter around what such gaps imply for our health has lately been amplified by cheers of public support for a health crackdown on eateries and dark stores in some cities. That such rules must tighten is a rallying cry with national data behind it. India's latest health survey flagged obesity as a risk set for a demographic bulge, with diabetes, hypertension and cardiac cases rising fast. An upswell against 'junk food' finds added validity in how hard it is to keep kids off it. Even so, for the same reason that we do not ban such edibles, freedom of choice, packaging rule revisions must weigh trade-offs closely before they go into force.

One big hitch is that there is too much out there to regulate case by case, so India's regulator can only apply broad category rules that may be harsher for some items than others. Standard pack labels that show nutritional values, especially salt, sugar and fats, can offer data on basic

risks at best. Case-wise scrutiny is rare but useful. In July, for example, the FSSAI directed makers of fizzy beverages with high caffeine not to call them 'energy' drinks; nor could they claim to "aid in general weakness" or say it "revitalizes body and mind." This was apiece with another move to stop businesses from using terms like '100%' as part of their brand interface; the practice was judged as a sneaky way to make a false claim of purity in the hope its fine-print would escape notice. That consumers are not misled is part of the regulatory agenda for good reason. But what exactly might justify a message slapped on to grab eyeballs is a separate question. Like some other countries, India could well adopt interpretative labels: say, 'high sugar' marked boldly in red or 'low fat' in green. Given how much longer Indian pack labels often take to read than those in advanced markets, there exists a case not just for a better mix of brevity and clarity, but also for traffic-signal type health codes.

An informed market is an aim nobody argues with, but how in-your-face a warning ought to be is best calibrated by scientific studies of risk. Chewing gum with xylitol can have an ill-effect on some but not all users. Similarly, junk-food risks vary across categories, age morbidities, etc. If India's threshold for what justifies an invasion of a brand's creative space—its pack-face design—is set too strictly, it could end up as market overkill. Cases of glaring caution being an absolute-must do exist. Like cigarette packs, even if the rules now in force are arguably over-the-top. Junk food rules are nowhere near that extreme, but as they tighten, they must not slip down a slippery slope of market intervention. Let's analyse lethality first, like a good insurer would—without invading anyone's privacy.

THEIR VIEW

The five anti-canons of taxation that must guide India's tax policy

The interests of the economy should be held above the convenience of a revenue-maximizing state



MANJUNATH A. N. & ARJUN RAGHAVENDRA M.
are former officers, Indian Revenue Service.

The affirmative principles of tax policy are settled doctrine. Equity, fairness, certainty, simplicity, neutrality, predictability, efficiency, transparency and adequacy. This is the modern tax-policy canon, descended from Adam Smith's four maxims and distilled by the OECD's Ottawa framework, it is accepted globally. India's problem has rarely been ignorance of what should guide tax policy, but an unwillingness to name what should not. Here are five anti-canons that tend to write our tax laws today, and must be barred from writing them tomorrow.

One, revenue maximization must not be the basic motive: It is the result of good tax policy, never its premise. A statute drafted with collection targets as its architecture will choose the widest base of suspicion and the harshest machinery to work it, and then underperform because taxes built to extract behave worse than taxes built to be paid. This is not rhetoric but the logic of tax design itself: from Ramsey to the Mirrlees Review, the optimal-tax system was found to treat the revenue a state needs as a constraint to be met at the least cost to the economy. A good system raises revenue but must not be the principle a tax rests on. Every mature canon lists adequacy last, not first. Indian drafting inverts the order and this shows in provisions that block credit, deny refunds and presume evasion, each of which is

defended in the name of revenue needs but erodes the very base that revenue grows from.

Two, tax policy must not be made in isolation: It is not a self-contained machine; it is one gear in the economy's transmission. Tariff structures are trade policy. Input credit oils manufacturing strategy. Refund speed is an export incentive. Rate schedules shape consumption patterns. Drafting tax provisions without asking what they do to global supply chains, capital flows and competitiveness is to miss the forest for a single heavily-guarded tree. The question before any finance bill should be what a clause does to the economy that pays it, rather than just how much it could add to state coffers.

Three, the state must not play heads, I win, tails, I amend: When the taxpayer loses, the matter is closed; when the state loses, the statute is retrospectively rewritten. That asymmetry is the single greatest destroyer of tax certainty India has produced. Vodafone won at the Supreme Court in 2012; Parliament amended the law back to 1962 to undo its victory, and it took a lost treaty arbitration and nine years before that amendment was finally buried. Similarly, when the Supreme Court held in 2007 that offshore technical service fees fell outside India's net, Parliament

rewrote Section 9 of the Income Tax Act retrospectively to override it. When courts held that the first rewrite had not done so, it was done a second time. A state may disagree with a verdict; it may prospectively change the law. What it must never do is rewrite the past.

Four, the state must not be penny-wise with the economy: Collection efficiency matters, but a nation's progress is not measured by what its tax department gathers, but by what its people collectively build. A rigid administration that squeezes working capital for small firms, litigates every startup's valuation and treats each refund as a concession wins the quarter and loses the decade. The state that prospers is large-hearted with all that's productive: jobs, manufacturing depth, the aspirations of young firms. The geopolitics of supply chains are not externalities to tax policy, but its report card.

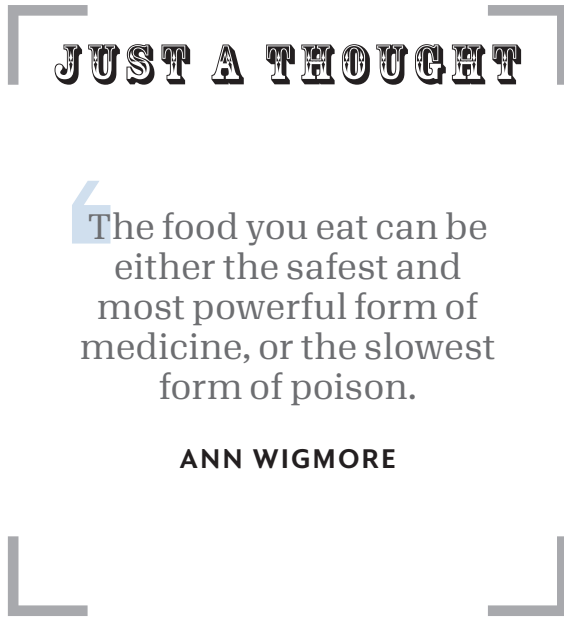
Five, cadre management must not masquerade as tax administration: This is the anti-canon nobody wants to name, because those who know it best are the ones to administer it. The number of commissionerates, the choice between a commissioner in every city or one per state, the design of faceless versus territorial assessment—these are often settled by the arithmetic of posts, promotions and anxieties of the tax administration, instead of by what the economy needs. Administrative geography drawn to fit a cadre's career pyramid is not neutral: every additional jurisdiction is an interface, and each one is a compliance cost the economy pays.

The five share a theme: each keeps the state from placing its convenience—its targets, silos, face, pride, promotions, etc—above the economy it serves. Well-known affirmative canons all point one way: tax is the price of civilization, collected so that society may flourish. The anti-canons are how that price becomes a penalty. India knows how to write the principles on the wall. The harder reform involves striking out what has been writing the fine print.

QUICK READ

Don't aim to maximize revenue, assess the economic impact of taxes, make no 'heads I win, tails I amend' retrospective tweaks and ensure that tax policy is neither penny-wise nor cadre-shaped.

India should adopt these five anti-canons of taxation for the sake of better overall outcomes. Tax policy must never put the state's convenience above the economy it serves.



GUEST VIEW

Indian universities must become the student's sandbox

G. VENKATESH



is director, School of Technology, Dhirubhai Ambani University, Gandhinagar.

The existential threat of artificial intelligence (AI) has fundamentally broken the traditional promise of higher education: get a degree, get a job. The corporate hierarchy is aggressively shifting from a pyramid to a diamond. At the bottom, where legions of fresh graduates used to find entry-level jobs, companies can now dispense with human employees, deploying AI to automate tasks. The roles at the centre and top demand high-level synthesis, creativity and adaptability. With fewer entry-level positions available, an uncomfortable question haunts every student and parent in India while choosing a college: Why go to a certain university if it no longer guarantees a job?

The answer requires tearing down the way we view higher education. The university can no longer be seen merely through the lens of immediate employment. It must become the student's ultimate sandbox—a place of radical self-discovery, intellectual friction and exploration.

Consider a young Indian's journey.

Where do they get the chance to figure out who they actually are and what they are good at? They cannot do it in our schools. The fundamental purpose of the school system is to establish a universal foundation—it must educate tens of millions of children to reach a baseline of literacy, numeracy, core subject knowledge and civic readiness. The sheer scale of the system makes it rigid; it cannot be a laboratory.

They certainly cannot figure it out when they enter the workforce. By the time a young adult secures a job, the stakes are far too high. They have bills to pay, ageing parents to support and eventually, families of their own. The financial and social risks of dropping everything to pivot careers or try something entirely new are paralysing.

That leaves a vital three-to-four-year window: the university.

This is that rare time in a person's life when they have the intellectual freedom, the resources and the safety net to explore alternatives without ruinous consequences. A student must be allowed to mix disciplines, fail at new ventures and aggressively experiment to find their calling. In an age where AI makes tomorrow entirely unpredictable, the only defence we can give our youth is agility. We must teach them survival skills. We must

teach them to think like entrepreneurs—not necessarily to build startups, but to navigate ambiguity.

Currently, universities are failing at this because they are trapped in a metric-chasing rat race. They evaluate their worth by counting enrolled students, faculty ratios, publications, memoranda of understanding and patents filed. But as Goodhart's law warns us, when a measure becomes a target, it ceases to be a good measure. Institutions game the system for rankings rather than focusing on the student's intellectual evolution.

This institutional rigidity is downstream of a culture that has historically punished risk-takers. When Dr Subhas Mukhopadhyay created India's first (and the world's second) in vitro fertilization (IVF) baby in 1978—just 67 days after the world's first in the UK—he was not celebrated as a pioneer. Instead, he was subjected to a brutal government inquiry that drove him to suicide. Today, ironi-

cally, India is the second-largest IVF destination in the world. We can no longer afford to crush the experimental spirit. We must actively nurture it on Indian campuses.

What does this sandbox look like in practice? It means stripping away a rigid and predictable syllabus so that students can finally chase what actually interests them, testing wild ideas alongside a community of equally obsessed peers.

The National Education Policy (NEP) 2020 has already laid down a blueprint. Concepts like the Academic Bank of Credits are designed precisely for this—to let a student take a Python coding class here, a behavioural psychology seminar there, and build a unique as well as agile profile that AI cannot easily replicate. But execution remains patchy. Universities are deeply territorial, hesitant to accept credits earned elsewhere or allow genuine cross-disciplinary freedom.

This institutional paralysis must end. The

challenges of the AI era do not respect departmental boundaries; an engineer today must understand ethics just as an economist must understand data science. We need role-model universities that boldly dismantle these traditional silos and experiment with entirely new problem-driven pedagogies. For this to happen, the regulatory ecosystem must evolve. Government bodies like the University Grants Commission (UGC) and All India Council for Technical Education (AICTE) must act as facilitators of this revolution, not its gatekeepers. They must shift their mandate from enforcing rigid compliance to actively rewarding institutions that dare to innovate.

The era of mass-producing identical graduates for a predictable job market is dead. We are marching millions of young people into a diamond-shaped economy armed with pyramid-era tools. In an age when AI can instantly replicate standardized skills, a static degree is no longer a shield. Indian universities face a stark and unavoidable choice: tear down their walls and become the dynamic and interdisciplinary sandboxes our youth desperately need to survive, or remain assembly lines, producing a workforce that may no longer be needed in a future rewritten by AI.



THEIR VIEW

It's the Age of Gated Recessions: time to resist runaway inequality

Multitudes could suffer adverse conditions while the rich grow richer and aggregate economic indicators mask hard times



KAUSHIK BASU
is a professor of economics at Cornell University and a former chief economic advisor to the Government of India.

Something strange is happening in the US labour market. The latest data released by the Bureau of Labor Statistics shows that the US economy lost 23,000 jobs in July, yet its unemployment rate actually fell to 4.1%. A closer look helps explain the apparent contradiction.

To be counted as unemployed in the US, a person must be actively looking for a job. Today, however, the job market is so bleak that people are giving up the search for work. Economists call this the 'discouraged worker effect.' As a result, the unemployment rate can decline even as demand for labour falls, because the supply of labour is shrinking even faster. Some estimates suggest that more than 2 million people have left the US labour force since November 2025.

By advanced-economy standards, the US has a high poverty rate. In 2024, 10.6% of Americans lived below the poverty line, which is defined as an annual income of less than \$31,812 for a family of four. As some observers have noted, this figure may not reflect the true extent of the problem, since poverty has many dimensions that are not captured by a single income-based measure.

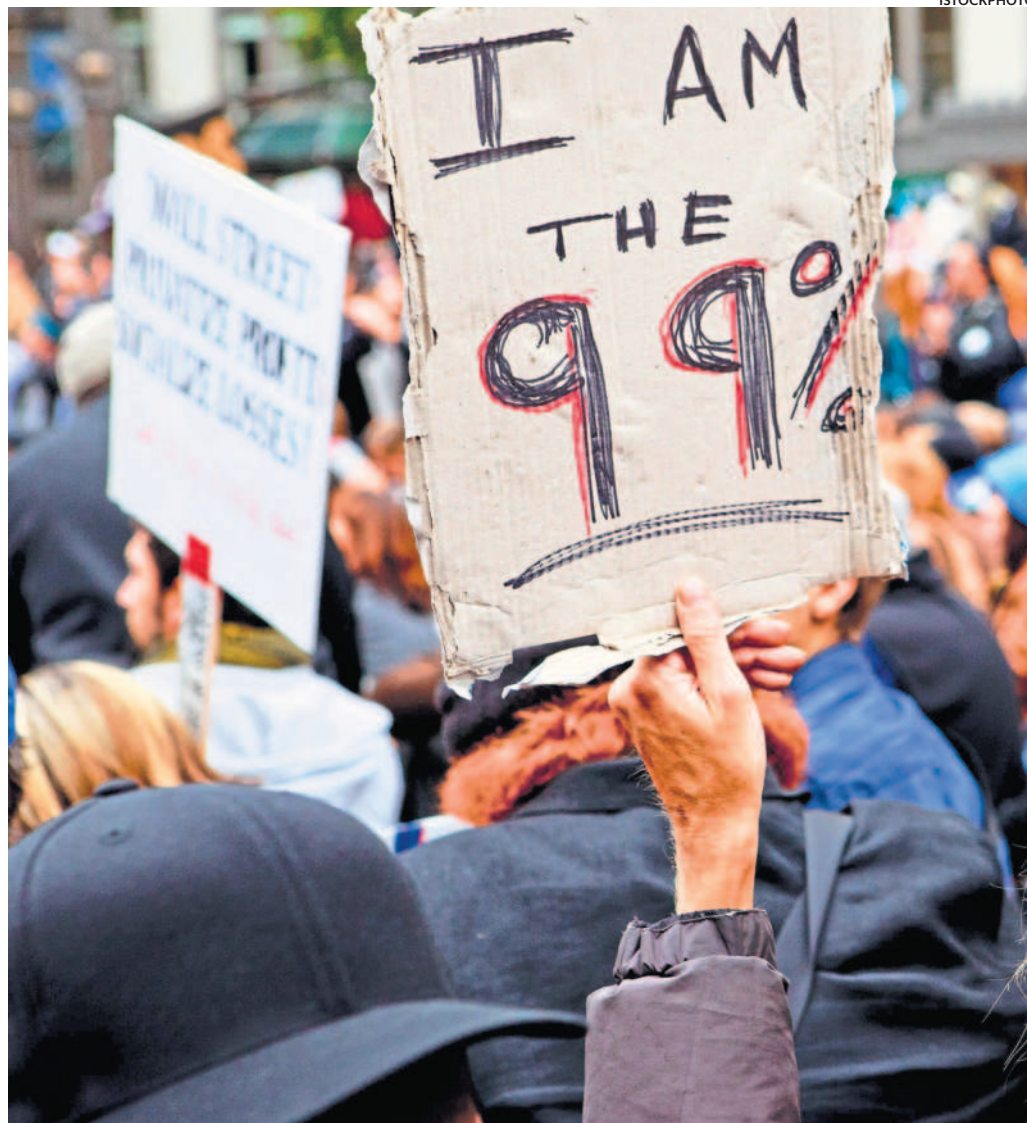
Moreover, many workers above the poverty line are seeing their real incomes shrink. Average US wages grew by 3.2% over the past year, while inflation hovered around 3.5%. With jobs becoming harder to find and workers losing purchasing power, there would seem to be good reason to worry that the economy is headed for a recession. But that is not happening—at least in the conventional sense.

The term 'recession' typically refers to a decline in economic activity across the country as a whole. A commonly used measure is two consecutive quarters of falling real GDP. By this measure, the US is not currently in recession, largely because rapid growth in some sectors, particularly AI, is offsetting weakness elsewhere.

The result is a striking divide. Even as American workers lose out, those whose incomes depend on stocks and corporate profits are enjoying boom times. Notably, reports of job losses and worsening labour-market conditions coincided with a rise in US stock markets. The S&P 500, for example, gained 47.68 points, or 0.6%, that same week.

These trends are not unrelated. As firms respond to new technologies by shedding workers, labour costs can fall, boosting profits. Technology stocks did particularly well as news of US job losses broke, with Nvidia gaining 2.3% and Broadcom up 1.7%.

This economic divide is not confined to the US. India is experiencing similar bifurcation. Youth unemployment remains extremely high, with a severe shortage of jobs for young graduates of colleges and universities. The World Bank estimates that India's youth unemployment rate increased



ISTOCKPHOTO

by 2.1 percentage points to 17.7% in 2025. Consequently, many of these young people and their households may be experiencing a decline in real income.

At the same time, India's economy continues to grow rapidly, with per capita GDP rising by 6.6% in 2025. Here, too, aggregate figures conceal a bleaker picture, as strong income growth in a small segment of the population coexists with economic distress for many others.

Allowing such a stark divide represents a major policy failure.

As a middle-income country with relatively low wages, India can, given the right policies, create jobs for its young people. This remains true even if current labour-market trends are being driven by AI and other digital technologies that reduce demand for human labour and concentrate profits in a few hands.

As economies become increasingly fragmented, policymakers, journalists and other observers must pay closer attention to what lies beneath aggregate statistics. We are entering an era of what might be called 'gated recessions': certain groups or regions experience recession-like conditions while the rich grow richer, keeping aggregate indicators looking healthy.

It is possible, for example, that lower-middle-

class households in India—especially those with young adults fresh out of college—are effectively caught in a gated recession. In the US, states with the highest concentrations of low-income residents, such as Mississippi, New Mexico, Louisiana and Oklahoma, could similarly be experiencing localized, gated recessions as the labour market deteriorates.

The point is not to assign blame, as the causes of

these disparities are often deep-seated and cannot be attributed to any single individual, party or administration. Nevertheless, politicians need to be held accountable for their response, rather than be allowed to dismiss the problem by pointing to favourable aggregates.

Addressing these divisions will require multi-faceted policy interventions. As AI continues to advance, wealth inequality is likely to skyrocket. Attempting to protect jobs by discouraging AI adoption through regulation would do more harm than good, creating costly distortions and

weighing on productivity growth. A more effective way to break down the barriers between gated wealth and gated poverty, and ensure that the gains generated by technological progress are broadly shared, would be to impose higher marginal taxes on the fortunes, inheritances and incomes of the super-rich. ©2026/PROJECT SYNDICATE

QUICK READ

It is possible, for example, that lower-middle-class households in India—especially those with young adults fresh out of college—are effectively caught in such a 'gated recession.'

Trying to halt job takeovers by AI would do more harm than good but an advisable policy may be to levy higher marginal taxes on the fortunes, inheritances and incomes of the ultra-rich.

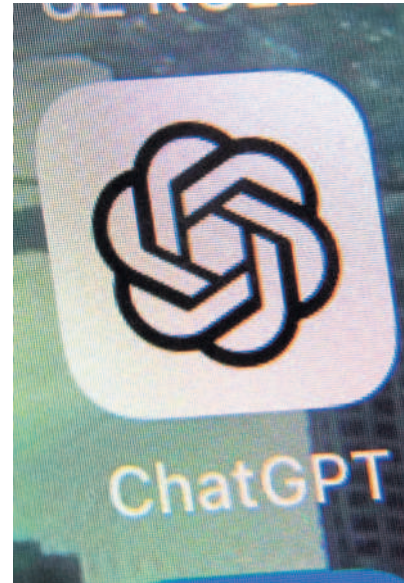
MINT CURATOR

Why AI chatbots designed for teens are no relief for parents

Addictive technology and developing brains are a dangerous mix



ABBY MCCLOSKEY
is a columnist, podcast host, and consultant.



OpenAI's ChatGPT for teens merely shows recognition of parental concerns. AP

OpenAI has launched ChatGPT for Teens, complete with various safety features. But this implies that the main concern of kids using artificial intelligence (AI) is their access to damaging content. If only.

Don't get me wrong. AI-assisted suicides, deepfakes and sexually explicit conversations with and for children are—to be frank—horrific.

But, as a mother, my deepest concern is what AI use does to teens' ability to think critically and develop socially. The only way to address those worries is not to toggle with the app, but to limit kids' exposure to it entirely.

The new version of ChatGPT for Teens is targeted at kids aged 13 to 17. It includes content restrictions around sexual, violent and self-harm topics. It also promises to curb AI use for homework, guiding students towards next steps instead of simply spouting answers straight up.

This is all well and good. I'm with the 80% of American parents who support more controls on AI for kids, including parental permissions and alerts.

But when it comes to the efficacy of such protections, I'm not holding my breath. We've seen how hard it is to impose age controls on social media. And age verification for ChatGPT for Teens has no legal force behind it.

Even more concerning, a version of the app marketed at teens may make parents (or educators) feel more comfortable with children accessing it. That could increase the use of AI by adolescents. They are already talking too much with their AI chatbots as it is.

And of course, whatever OpenAI blocks is still available elsewhere. A new survey by Common Sense Media's Youth AI Safety Institute found that 63% of teens are using AI explicitly to get homework answers. Testers asked Google Search to do their homework (math sets and essays) and it completed every assignment. And if you or your child are wondering, there is no way to turn Google AI's assistant off.

Already, our children's brains are being changed by exposure to these tools. A recent study out of the University of Hong Kong and Stockholm University looked at 27,000 students ages 12–18. The academic researchers found that after six months of using AI, students saw their average homework score go up. But come exam time, the same kids scored 20% below their classmates who had not used AI.

This comes atop other early research suggesting a decline in cognition as a result

of AI use. A 2026 literature review of 400 studies by the Brookings Institution, where I am a fellow, concluded "the risks of utilizing generative AI in children's education overshadow its benefits."

This is to say nothing about what AI is doing to children's relationships with their parents and with each other. In a 2025 survey by Thorn, a child safety non-profit entity, nearly a third (29%, that is) of minors had turned to AI chatbots for guidance on a sensitive or intimate topic—a friction-free alternative to seeking their parents' and peers' counsel.

To be sure, we are at the very beginning of understanding what AI might do to human cognition. Maybe there will be some incredible upside, some unique advantage for kids in particular.

But try telling that to this battle-weary bunch of moms and dads. In the last decade, we've had to navigate kids' relationships with smartphones, social media and screen-based schooling. And now AI.

Each time, policymakers and Big Tech and schools have erred on the side of sorry rather than safe. Each time, reams of after-the-fact data have confirmed what common sense could foretell: Addictive technology and developing brains are a dangerous mix.

So, yes—if OpenAI wants to help address the problem it has created, that counts as progress. I'll cheer on any attempt to put more guardrails on Big Tech when it comes to kids.

But the most surefire way in schools and homes to protect children from AI—at this critical time of development of the technology and a critical time for the development of our children's faculties—is to limit access to it completely.

In school, it may make sense to return to taking exams with pen and pencil. Homework should be done on paper, or at the very least, a device that can block AI—which means companies will have to grant parents and teachers the ability to do so.

At home, parents should keep trying to delay personal screens from being used by their children as long as possible. Bring back reading, time outside and playing with friends instead.

Call me reactionary, but look at apps designed for children with a particular level of scepticism. ©BLOOMBERG

MY VIEW | PEN DRIVE

Tourist or traveller? Bali has long charmed everyone

RAHUL JACOB



is a former Financial Times foreign correspondent.

The line up of grinning, life-sized robotic images instead of immigration officers at Bali's airport welcoming us with manic enthusiasm on Monday turned out to be a mirage. The passport scanning machines were brand new but not working, forcing most travellers into queues manned by very few officers. This mechanical malfunction was after Indonesian e-visas and e-arrival cards had made the process both easier and more complicated. Indonesia requires pointless 'captcha' codes to be deciphered by visitors, but Indian e-arrival formalities are still more difficult to complete on a computer screen because a balloon unhelpfully obscures the code. Meanwhile, in Europe this summer chaotic immigration queues even led to some flights taking off without several passengers caught in the snarl of bureaucratic overreach. If this dystopian travel experience is a forerunner of human-supervised artificial intelligence, we should all worry.

And, there is the rub. Online bookings may nowadays require just a few clicks, but tourist destinations are frequently overwhelmed by tourists searching for Instagrammable moments. The Bali I first encountered was two decades ago when I rushed to the island after a terrorist bombing on Kuta beach and in Jimbaran Bay to write an article criticizing warnings by Western governments not to travel to Bali. Now, it is the congestion at popular destinations that I worry about, starting with airport immigration queues.

I am guilty of considering myself a traveller while maintaining that "the other fellow is a tourist," as the late novelist Evelyn Waugh observed. Today, visitors from different countries make Bali or Florence feel like its attractions are under siege from a non-violent infantry toting selfie sticks and marching behind tour guides with colourful flags.

As far back as 1988, in a collection of essays titled *Holidays from Hell*, American humourist P.J. O'Rourke complained about just about every nationality abroad, starting with his own to "peevisish Swiss, smelly Norwegian backpackers yodelling in restaurants" to Japanese who travelled in large groups and Germans by the hotel poolside.

Almost 20 years ago, I published a collection of travel essays that celebrated the fact that overseas travel could be enjoyed by tens of millions of travellers from Asia and argued that burdensome visa regimes needed to catch up.

The world of travel is thankfully more egalitarian now, but I paradoxically travel much less. My memories of visiting places such as Kerala's backwaters or taking rowing lessons, gondola-style standing up, in Venice decades ago are crowded out by visions of throngs at these destinations. Covid brain fog for me was unusual: the two lockdowns in India as well as government-mandated extreme social distancing felt akin to solitary confinement. I felt cut off from friends elsewhere in India and around the world while becoming inoculated against wanderlust.

I am now the very opposite of the adventurous traveller I once

posed as. Gone are the days of jumping on a plane to Dakar in Senegal to listen to its incredible posse of singers from Youssou N'Dour to Orchestra Baobab in concerts that sometimes lasted till 5am. No more do I travel to Beijing or Bali as I once did, or for literary festivals. Instead, I enjoy travel most when seeing friends instead of sightseeing.

The bizarre effect is to feel more deeply connected to places than I did before. On this visit to Bali, I stayed first with friends in a made-for-movies minimalist villa in Cemagi. I arrived, after a two-hour drive from the airport through clogged roads reminiscent of Bengaluru, to a lunch that felt like a reunion with them and other friends. I arrived at another friend's home in Bali to find almost every dinner over the week was a different event, one of which was a conservation project to save fireflies.

This week, I attended the memorial in Ubud of a Malaysian friend and

renowned gallerist and *bon vivant*, done largely according to local customs. His partner of more than three decades left the event's organization, lunch included, to his staff because, as he self-deprecatingly explained, his partner handled this sort of thing. Instead of the void, one felt the presence of his partner on an occasion that included Balinese dance and a traditional *gamelan* mini-orchestra. Youngsters gave tributes to a favourite gay uncle who had mentored them. Hundreds of solitary marigolds hung from trees in a rock garden he had designed. Simple offerings of frangipani and bougainvillea were in lacquered trays that resembled crowns. Beryl de Zoete, who published a book on Balinese dance in 1938, wrote that even then, when Charlie Chaplin and other Hollywood stars visited the island, there were people who said "Bali was too spoiled to be worth a visit." Her rebuttal was forceful. "Bali is neither a last nor a lost paradise," but home to people "who have a great sense of humour and a great sense of style where their own traditions are concerned." At a memorial that combined sumptuous colour in a seemingly effortless ritual of remembrance and celebration, those words rang true some 90 years later.

Plane truth

A second airport for Chennai brooks no further delay

As was widely expected, the TVK-led Tamil Nadu government has shelved the Parandur airport project citing reasons such as displacement of people and environmental issues, including the project’s location on a water body. While this was one of Chief Minister Joseph Vijay’s campaign promises to the people of Parandur, the decision marks a set back to Chennai’s long-felt need for a second airport rivalling that of its neighbours in Bengaluru and Hyderabad.



Trade and industry from the State is disheartened by the news and justifiably so because the existing airport is an apology and hardly one that reflects the vibrant industrial and services sectors of Tamil Nadu. Chennai’s search for a second airport began more than two decades ago and still continues. In this period, New Delhi, Mumbai, Bengaluru and Hyderabad have all acquired swanky new airports with the last two drawing traffic away from Chennai in recent times. Industry representatives and associations are worried that foreign investors should not draw signals of an unstable policy environment from the abandonment of the Parandur project.

Now that the decision has been made, the TN government needs to quickly act on multiple fronts to send out a signal to investors, trade and industry of its commitment to a second airport and to solving the capacity issue in the existing one. Even as it scouts for a new site, the government should look at ways of increasing terminal and runway capacity in the existing one. A new airport, even by the most optimistic estimates will take at least five years to implement. The possibility of adding a third runway at the existing airport has to be seriously examined even as the government has already said that it is looking at a new Terminal 5 at the current location. An internal study by the State government a few years ago highlighted options for a third runway which would run somewhat tangential to the bends of the Adyar river, northwest of the airport. The report noted that the additional 4,400m by 300m runway and associated infrastructure would necessitate acquiring about 273 hectares of land. With Terminal 5, an additional capacity of 20 million passengers annually can be added, but this can at best be a band-aid solution until a new airport is commissioned. There is no question that the government needs to begin work on a second airport right away. Globally, greenfield airport site selection has always risked disrupting agricultural communities or the environment. CM Vijay will have to navigate tricky territory here especially because displacement was the primary reason for shelving Parandur.

Finally, privatising both the existing facility and the greenfield airport is imperative. Airports in Delhi, Mumbai, Bengaluru and Hyderabad, which have been handed over to private operators stand out for their quality of services and passenger conveniences, quite in contrast to the Airports Authority of India-run Chennai airport. The vibrant industrial ecosystem of Chennai deserves better than this.

POCKET RAVIKANTH



The real causes of sugar price spike

BITTER TASTE. Ethanol diversion and monsoon deficit are not the main culprits. It is speculation by market intermediaries



A NARAYANAMOORTHY

The sudden escalation in retail sugar prices across India over recent months has caused concern among policy makers and consumers, especially with the festival season round the corner. Retail sugar prices in have surged from around ₹45-₹48 per kg up to ₹58-₹70 per kg. A rigorous examination is needed to determine whether this price increase stems from El Nino weather phenomena, the diversion of sugarcane for bio-fuel production, speculative market dynamics or long-standing flaws in crop pricing.

THE COBWEB CYCLE
To understand sugar price fluctuations in India, one must examine the fundamental sugarcane production dynamics. The domestic sugar sector operates under the Cobweb phenomenon.

In years when sugar prices are high, farmers are incentivised to expand their sugarcane area in anticipation of strong profits. As sugarcane is a long-duration crop that requires 12-18 months to harvest, the increased production does not hit the market immediately.

When the increased harvest finally arrives, it creates a massive market surplus. This oversupply inevitably crashes domestic prices, causing mill owners to default on payments, leaving farmers with mounting arrears.

For 2024-25 season alone, the total arrears owed to farmers reached about ₹3,449 crore. Disappointed by falling returns, growers subsequently reduce their sugarcane area in the following planting season. This reduction creates a severe supply deficit two years down the line, sending retail prices soaring once again and restarting the entire cycle.

Reinforcing this, the data also show that the sugarcane production declined from 491 million tonnes (mt) in 2022-23 to 456 mt in 2024-25. The primary trigger behind the current surge is this downward slope, worsened by regional supply contractions (see Table).

IMPACT OF EL NINO
So is the monsoon deficit driven by El Nino the root cause of the current supply tightness? Sugarcane is a water-intensive crop that relies heavily on sustained monsoon rain and strong reservoir levels during its cultivation phase. Evidence suggests that weather anomalies have indeed played a massive role in shrinking overall output, though we have no firm estimate on this year’s



Domestic demand-supply outlook of sugar (million tonnes)

Particulars	TE 2020-21	2021-22	2022-23	2023-24	2024-25	2025-26 (estimated)
Opening stocks	120.3	85	70	57	79	50
Production ⁵	305.3	359	330	320	261	306
Imports	0	0	0	0	0	0
Exports	56	110	63	1	9	15
Net availability	369.7	334	337	376	331	341
Consumption	256.3	273	280	297	281	285
Closing stocks	113.3	61	57	79	50	56
Stocks-to-use-ratio (%)	44.2	22.3	20.4	26.6	17.8	19.6

Note: \$ - after discounting diversion of sugar to ethanol production; TE - Triennium ending Source: CACP (2025), Price Policy for Sugarcane 2026-27 Sugar Season, New Delhi

production. Estimates from the Ministry of Agriculture illustrate this weather shock. Initial domestic sugar production projections for the current season were pegged at roughly 34.3 mt. However, as the impact of unseasonal dry spells and El Nino became clear, actual production figures were revised downward to 30.6 mt, a drop of about 11 per cent.

But, a question also arises: if El Nino is the primary factor, why did the retail price of sugar not surge in 2024-25 where the sugar production went down to 29.6 mt compared to its previous period production of 34.1 mt?

Besides weather shocks, public discourse has focused heavily on the government’s ethanol blending programme as a major culprit behind the sugar price surge. Diversion of sugarcane into ethanol production does reduce the volume of raw material available for conversion into edible

When a shortfall in national sugar output is anticipated, wholesalers, stockists and large commercial buyers withhold stocks, creating an artificial scarcity and causing a price surge

sugar. However, a closer look at official allocation data reveal that ethanol diversion is only a secondary factor. Recognising the impending production deficit caused by poor monsoons, the Ministry reportedly capped the amount of sugar permitted for ethanol diversion.

In absolute terms, sugar diverted for ethanol was restricted to roughly 1.7 mt in the current season, down significantly from the 3.8 mt diverted during the previous year. Furthermore, the proportion of total ethanol produced from sugarcane also fell from 86.2 per cent in 2020-21 to 31.5 per cent in 2024-25, as grain-based feedstocks like maize were mobilised to fill the gap. Therefore, ethanol blending cannot be the sole driver of the sudden price spike.

While fundamental supply shortfalls set the stage for higher prices, market behaviour by intermediaries often accelerates these spikes. The domestic sugar trade operates under a regulated monthly release mechanism, where the Centre assigns specific sales quotas to individual mills to regulate market supply and keep prices stable.

When market players anticipate reduced national production and tighter monthly quotas, speculative behaviour takes over. Wholesale traders, stockists and large commercial buyers begin to withhold inventory in anticipation of higher future profit margins, leading to an artificial scarcity.

Will Apple Pay’s entry create a ripple or a splash?

Apple is entering the premium card segment, tapping into its ecosystem of phone users. How it approaches UPI is a question

P Saravanan
A Paul Williams

Apple Pay is reportedly set to enter the Indian market by October 2026, marking the culmination of talks that have run on and off since 2023. Apple’s own contactless wallet is already active in more than 90 countries, and its absence from India, now among Apple’s fastest-growing markets outside China, has become an increasingly conspicuous gap. That gap looks set to close.

Apple Pay’s first phase in India will be built around credit cards on the Visa and Mastercard rails, the same framework the service uses across most of its existing markets. iPhone and Apple Watch users will be able to store card details in Apple Wallet and tap to pay at point-of-sale terminals, with Face ID or Touch ID securing each transaction.

Apple has reportedly been negotiating with India’s largest card issuers, including ICICI Bank, HDFC Bank and Axis Bank, over how the interchange fee on each transaction will be shared, a negotiation that goes to the heart of how Apple monetises payments worldwide.

What Apple Pay will almost certainly not do at launch is support UPI. To offer UPI transactions, Apple would need

clearance from the National Payments Corporation of India (NPCI). This body runs the network and would have to onboard a sponsor bank to route transactions, much as every other UPI app does. Industry reports suggest UPI support may only arrive in a later phase, if it arrives at all in the near term.

Why does the fee structure explain the sequencing? The distinction between cards and UPI matters commercially more than it might appear. Most UPI transactions in India still carry a zero-merchant discount rate, even as the government has a modified the policy recently by introducing an MDR on UPI transactions above ₹2,000.

Card transactions, by contrast, carry an interchange fee that is shared between the card network, the issuing bank and, in Apple’s case, the wallet provider itself. Apple Pay’s initial focus on cards is therefore less an accident of sequencing and more a reflection of where the fee revenue actually sits. The company gets an immediate foothold in India’s growing premium credit card segment while, for now, sidestepping the zero-fee UPI rails that dominate everyday transactions but generate no direct revenue for wallet providers such as Apple.

What does this mean for domestic players? For India’s homegrown



PAYMENTS SCENE. New entrants

payments ecosystem, the immediate impact is likely to be narrower than the headlines suggest. UPI volumes remain overwhelmingly concentrated in PhonePe and Google Pay, which together account for more than four-fifths of monthly transactions, with PhonePe alone processing close to half of all UPI volume.

Because Apple Pay will likely not touch UPI at launch, this duopoly is not directly challenged in the near term, and Paytm, RuPay and the broader NPCI architecture continue to operate exactly as before. The effect will be felt at the margins of the premium card business.

The more interesting long-term question is what happens if and when Apple pursues UPI integration. Because UPI is a shared public rail rather than a closed loop network, Apple would be

plugging into the same infrastructure that PhonePe, Google Pay and Paytm already use, competing on user experience and ecosystem loyalty rather than on privileged access to payment rails. That is a fundamentally different competitive dynamic from markets where Apple Pay operates as a closed alternative to existing systems.

WAY FORWARD

The coming months should bring more clarity as Apple finalises interchange terms with issuing banks and works toward its reported launch window. Domestic UPI players would do well to keep deepening loyalty, credit and merchant tools.

For regulators, the more consequential decision lies further ahead, in how the NPCI eventually treats any future application from Apple for UPI access, since that single choice will determine whether Apple Pay becomes just another app on India’s shared public rail or remains confined to the smaller, if still lucrative, premium card segment. Apple’s entry is best read as a sign of how mature and attractive India’s payments market has become.

Saravanan is a Professor of Finance and Accounting at IIM Tiruchirappalli, Williams is the Head of India at Sernova Financial

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Lost in transit
This refers to ‘Trump says the US doesn’t need Canada; the economy says otherwise’ (August 27). Is it not ironical that Trump refuses to see the ‘writing on the wall’? How could he afford to turn a blind eye to domestic ground realities when it comes to its extensive economic dependence on Canada? One hopes Trump soon takes a more pragmatic approach while

negotiating with his key allies.
Kumar Gupta
Panchikula (Haryana)

Sugar worries
Apropos, ‘Sugar trail’ (August 27), a 40 per cent surge in sugar prices has transformed a household staple into a formidable burden, particularly during the festival season. The government bears substantial responsibility for miscalculating production and oscillating between export permissions and imports.

Excessive intervention in stocks, market releases, exports and ethanol diversion have aggravated supply distortions. Additional imports may provide temporary relief, but cannot rectify flawed policymaking. Accurate production forecasts, consumption assessments and coordinated trade decisions are imperative. The episode underscores the necessity of predictable policies, stronger market mechanisms and restrained intervention to safeguard consumers while sustaining

producer incentives.
N Sadhasiva Reddy
Bengaluru

The Editorial ‘Sugar trail’ while discussing the sugar situation in the country, points to the incorrect estimation of sugar production causing some of the price rise. However, the issue of diverting sugarcane for ethanol production must be considered carefully. Environmental sustainability is one dimension. Should we grow highly

water intensive crops like sugarcane and rice to produce ethanol rather than feed the population? While the crude oil import saving is indeed valuable, should it come at the cost of food security? A related point is water intensity of our exports. When we export 1 kg of rice, we give away about 4,000 litres of water for free. Since many regions are facing critical water shortages, this needs to be evaluated.
V Vijaykumar
Pune



CONTRAPUNTO

A squirrel dying in front of your house may be more relevant to your interests right now than people dying in Africa

— MARK ZUCKERBERG

Tragedy & To-Do List

Mountain floods will become deadlier. There are things we can do to minimise loss of life & property

What caused Wednesday’s devastating flash flood on the Nepal-Tibet border is not entirely clear, per some experts. Evidence points to two possibilities: a collapsed glacier, and an ice-rock avalanche. What’s almost certain, though, is that the event was triggered by global warming. Of course, such floods occurred in cooler times too. There’s evidence of Chong Kumdan glacier in Ladakh, for example, causing floods in 1835, 1926 and 1929. But as research published in *Nature* points out, frequency of such events in Himalaya-Karakoram region has increased. For example, there were altogether 135 GLOF – glacial lake outburst flood – events in the region from 1900 to 2000. But this century has already seen 85.

Worse may be in store for several reasons. One, the region is full of glaciers – 22,800 sq km in Himalayas, 18,000 sq km in Karakoram. It is warming faster than the planet overall. While Earth has warmed by 0.74°C per century, Himalayas are warming at 0.15-0.6°C per decade. They could be 5°C warmer by 2100. Three, warming speeds up melting of glaciers, lakes form around them, and when the pressure of water becomes too much, those lakes burst. Higher temperatures and rain are accelerating this change. That’s why June-July-Aug is the time when such events

mostly occur. Scientists see a lot of glacier-melting ahead. By some estimates, 65% of ice mass in the region could disappear by 2100. The worst is that we can’t undo this. Per Stefan Rahmstorf, an expert at Potsdam Institute, “We can’t get back to a cooler pre-industrial climate” because CO₂ that’s already been released will stay in the atmosphere for thousands of years. Our best policy, then, is to adapt quickly to this growing risk, because roughly 1mn people live within 10km of a glacial lake. The commonsense prescription would be to relocate away from narrow river valleys, not stress hillsides, and go easy on infra projects in mountainous areas. Early-warning systems are even more important for saving lives. With whole constellations of satellites available now, that shouldn’t be difficult. Plus, countries exposed to these mountains and glaciers – India, China, Pakistan, Nepal and Bhutan – should coordinate to keep people safe across borders. It’s good that China has now alerted people downstream of the Nepal-Tibet border crossing about the risk of a barrier lake bursting in the next couple of days. And while it isn’t easy, we can try releasing pressure in glacial lakes, like Bhutan did at Thorthormi Tsho in 2009. The manmade spillway lowered water level by 5m, and has kept farmlands and habitats safe.

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Moment Of Reckoning

Good that a social media giant must fix its products for kids & teens. But, will Meta do what it should?

The US judge – reviewing Meta’s settlement with 29 US states that sued it for “deliberately designing platforms to be addictive” – called the settlement “a good step forward”. It is important to weigh this. The payout, \$18bn, over 10 years, is very small change for a \$1.46tn m-cap company. Meta has also promised “safety features” that will make its platforms *accountable* to teens and children, beyond seeing them as mere consumers. But proof of the pudding lies in its eating. Point is, Meta’s revenue model is based on endless engagement, “infinite scrolling”, which the company’s internal documents showed, during trial, *leads to addiction*. Yet, Meta repeatedly ignored warning signs, and refused to abandon harmful features. That is what’s most problematic about the company – and reason why Meta has run afoul of govts worldwide, including GOI. Even after this suit, it has denied any wrongdoing. Thus, this is a step forward, but there’s a way to go.

Social media has an outsized, unhealthy influence on teens’/children’s self-worth, via filters, comments, likes, and shares. Among Meta’s new curbs are a default two-hour daily limit; an option for non-personalised, non-algorithm-led, feed, which means the company isn’t tracking a user’s activity, and a default blocking of comments/likes counts for teen accounts, to restrict comparison. All of this hinges on age verification, a tech that is, so far, unreliable and flawed, and increasingly depends on biometrics, which raises privacy concerns. Let’s not forget the reason X did not monetise porn was company executives’ warning that their tech could not “gauge creators of adult content were of legal age”, or accurately detect “child sexual exploitation and non-consensual nudity at scale”.

Thus, Meta has to/must invest in aging age-verification tech. The onus of safety, and controls, should not shift to the user, or parents. That Meta pushed for an early settlement after trial began is evidence enough it well recognises the problem, and has thus conceded to curbs. Yet, Meta has a condition – it not only seeks industry-wide adoption of safety measures, including by YouTube and TikTok, but also wants them to match the payout. The world will be watching how these curbs are really implemented.

Dom & the revolution

60 years ago, I searched for a Naxalbari militant

Jug Suraiya

Naxals are in the news. I have a story on Naxals to share. From years ago. The Naxalbari movement, named after a remote village in north Bengal, began in 1967 when police fired on a gathering of tribal peasants demanding land reforms. The episode sparked a blaze which, fuelled by the incendiary teachings of Mao about armed revolt, spread like a wildfire across the country, and made global headlines.

Poet and writer Dom Moraes came to Calcutta to do an article on Naxals for *The New Yorker* magazine. I was with JS magazine and the editor, Desmond, tasked me with finding a Naxal for Dom.

How did one go about finding a Naxal, a self-professed member of an underground movement? Could one put an ad in the Personal Column of *The Statesman* newspaper, “Wanted: A bona fide fully accredited Naxal, caste and gender no bar. Brokers, please excuse.”?

Someone that didn’t sound like a solution. I spread the word on the grapevine that I was in search of a Naxal. Finally, someone who knew someone who knew someone else who was known to another person, found a Naxal willing to be interviewed.

The interview was arranged in the JS office. Dom arrived, toting a tape recorder. A photographer was in attendance. Desmond and I hovered anxiously in the wings.

The interviewee walked in, a bespectacled youth with an incipient moustache. Dom switched on the tape recorder and asked the interviewee about his political philosophy. “Kill, kill, kill!” said the interviewee. And got up and walked out. The tape whirled in silence. The interview was over. In seven seconds.

“How am I supposed to write 8,000 words for *The New Yorker* based on that?” asked Dom. No one had an answer. Was my Naxal dimagi (smart) or un-dimagi (unsmart)? I don’t know. But he out-dimaged (outsmarted) Dom, Desmond and me.

Himalayan Warning From Nepal

Warming of mountains creates conditions for dangerous rain-and-ice events, glacial lakes multiply, and get filled up to the point of triggering outburst floods. Add to this China’s activities in Tibet. Also, Bihar is at the sharp end of all of this

Anjal Prakash



IPCC author

China has warned that a newly formed lake higher upstream at the Tibet-Nepal border is at risk of breaching, which might worsen the ongoing flood-related crisis. But the mechanics of this disaster are, on their own, typical for the region. A warming-induced glacial outbreak sent a debris-laden surge down the Trishuli River system. It has killed hundreds, with more than a thousand missing. It also put Bihar districts that border Nepal on high alert, as Gandak River rose. Still, what makes the event worth a longer look is not the flood itself. The key thing is it’s sitting on a curve that’s been tracked and measured for years, and scientific papers have been published.

A mountain range warming faster than the planet around it | ICIMOD’s 2019 Hindu Kush Himalaya Assessment found that even if the world warms to 1.5°C, this region will still warm by at least 0.3°C more than that. Under moderate emissions assumptions, the region is headed for 2.5°C (±1.5°C) of warming by the end of the century; under high emissions assumptions, 5.5°C (±1.5°C).

The same assessment found the region losing roughly one cold night and half a cold day every decade, while warm nights are becoming 1.7 nights more common each decade and warm days 1.2 days more common. None of that is a forecast anymore. It’s a trend already showing up in station data.

Warmer air holds more moisture, and destabilises the permafrost and snowpack that used to hold Himalayan slopes together. This is the physical link between a warming baseline and the kind of compound rain-and-ice event that hit Rasuwa. It’s also the reason for a tremendous rise in glacial lakes.

Lakes are multiplying | An ICIMOD inventory carried out between 1999 and 2005 counted 8,790 glacial lakes across Hindu Kush Himalaya, covering about 802 sq km, and flagged 203 of them as posing an outburst risk. A more recent mapping exercise in 2018 counted more than 25,000 glacial lakes across the region’s five major river basins, and its 2020 follow-up ranked 47 of these as dangerous enough to warrant close monitoring. Some

of this data variation reflects better satellite resolution and more thorough surveying.

But the direction both point in, more lakes, more of them growing, is consistent with what glaciologists expect, as ice retreats and meltwater pools behind loose moraine dams that were never built to hold a lake. IPCC’s special report on oceans and cryosphere confirms that glacial lake outburst floods are expected to become more frequent as warming continues, because the same warming that shrinks glaciers, is what fills and destabilises lakes downstream of them.



Sikkim got a preview of the failure mode in Oct 2023, when the South Lhonak glacial lake burst and tore down Teesta valley. Whether the Bhoté Koshi event will be formally classified as a GLOF or a combination of glacial events is still being worked out by the region’s scientists and authorities, but different hazards increasingly overlap in exactly this kind of terrain.

A monsoon that is drying on average and sharpening at the edges | An Indian Institute of Tropical Meteorology assessment has found that the Indo-Gangetic plain has witnessed its mean southwest monsoon rainfall decline by roughly 0.5 mm per day per decade between 1951 and 2024, a genuine drying trend across the belt that includes Bihar. The same body of research points towards sharper, more concentrated bursts even as the seasonal average falls.

Is The ‘Good Girl’ Syndrome Destroying Marriages?

Instead of expecting that the conditioning of decades will be magically reversed on wedding day, we should bring up our daughters to ask questions about their body and its desires

Seema Anand



We teach girls, repeatedly and insistently, that sex is dirty and sinful. We demonise pleasure and trivialise consent and boundaries, and then assume that all of this conditioning will simply reverse itself on wedding day, when she will suddenly become comfortable with her body, able to express and experience pleasure as an equal, while somehow retaining just enough modesty to prove that she was brought up a ‘good girl’.

Question is, do years of conditioning disappear with ‘social permission’? Or does the moralising more often settle into a subconscious guilt, which follows women into the marital bed? Resulting in embarrassment, suppressed insecurities, and a persistent sense that somehow, even here, they are doing something wrong.

‘Good Girl Syndrome’ is the term used for a familiar form of conditioning, which teaches that a woman’s ‘goodness’ is somehow connected to her sexual restraint. A ‘good girl’ doesn’t know too much about sex, doesn’t seem to ‘want’ it, doesn’t go out too much, or wear the kind of clothes or indulge in behaviour that may ‘invite attention’. Basically, she doesn’t cross any imaginary lines that may suggest that she is ‘that kind of girl’.

As with all clever conditioning, all this is not stated outright, but rather communicated through warnings, disapproval, and a casual judgement of other women – their clothes, friendships, so-called ‘misuse of freedom’ etc. And regardless of how young we are, we quickly learn that sexual behaviour in women is not just a minor indiscretion, it is the lens through which their character, accomplishments, and social acceptance will be measured.

Much of this mindset is passed from mother to daughter, often disguised as ‘protection’ – from gossip, from judgement, from being blamed if a man behaves badly towards you. Mom’s survival map, inherited from their mothers before them, is paved with good intentions but deeply damaging. Because, as we have discovered, what begins as protection can leave a rather different imprint.

A 2024 University of Michigan study, authored by T Ariel Yang in *Analyses of Social Issues and Public Policy*, found that negative sexual messaging in childhood is a strong, persistent predictor of sexual guilt in adulthood. This reinforces what I have found in my own experience, that negative moralising around sex will often turn into a deep-seated guilt associated with the act, which then follows women into their relationships, becoming a



barrier to intimacy, and damaging the very marriages it was supposed to prepare them for.

Have known countless women struggle to understand how they can fiercely defend a woman’s right to sexual pleasure and yet, when it comes to their own bodies, bear a persistent sense of guilt that somehow, they are doing something ‘wrong’. Why does their hard-won feminism suddenly disappear? Because the reality is that conditioning does not ebb simply because one can intellectually argue against it.

Put together, the physically consistent picture for a river system like Gandak or Kosi is not steadily more water year-round. It’s the same or slightly less water spread across fewer, more violent pulses, arriving from a catchment where glaciers and permafrost, which used to buffer runoff, are doing that job less reliably than they did 30 years ago.

Why Bihar absorbs the sharp end of this | Roughly 73% of its land area lies within the floodplains of rivers, some of which rise in Nepal: Kosi, Gandak, Bagmati, Burhi Gandak, and Mahananda. The state carries 22.1% of India’s entire flood-affected population, and by gov’t’s own estimate roughly three-quarters of north Bihar’s residents live under a recurring flood threat. The 2017 flood alone killed 514 and displaced or affected more than 17mn.

The engineering response to this exposure has been embankments, more than 3,400km of them by 2004. But their record is genuinely uncomfortable, with the flood-prone area of the state growing from 2.5mn ha in 1954 to 6.89mn ha in 2004. Embankments raise riverbeds through sediment deposition and concentrate whatever breach does occur into a much larger, faster failure. Kosi did exactly that in 2008 at Kusaha, cutting a new channel more than 100km from its embanked course.

Layer a warming-driven shift towards glacial instability, and sharper monsoon bursts, onto a river system already primed to fail catastrophically rather than gradually, and the implication is Bihar’s flood risk is being reshaped by forces upstream, in a catchment that is warming faster than the global average, filling with more unstable lakes, and increasingly delivering its rainfall in the kind of short, intense pulses that overwhelm infra built for a gentler hydrology.

The response that scales to the challenge? Glacial lake monitoring, automated telemetry that will give information, which can be analysed for threats, and which should be shared across the border in real time, rather than after the water has already moved. Building the next embankment higher won’t cut it.

China’s recent activity on the Tibetan plateau highlights how the catchment flows through three countries. A flood originating upstream does not respect a border, and neither can the response constructed to address it.

The writer is Professor of Public Policy at FLAME University

Calvin & Hobbes



Sacredspace



Raksha Bandhan: Reweaving Our Bonds

Brahma Kumari Shivani

There is something beautiful about festivals. They awaken ways of living that often get hidden in the pace of everyday life. Raksha Bandhan celebrates one such value – power of human connection. It is often seen as a festival of love, protection and responsibility. But before being a thread on the wrist, it signifies a bond between souls. Raksha Bandhan reminds us that relationships become strong not because of a ritual, but because of time, attention and energy we invest in one another. Today, this message is more important than ever.

Around us, many people are silently carrying emotional pain. Some are struggling with loneliness, anxiety, depression, and other mental health challenges without even realising it. We are witnessing a quiet crisis where people, including children, feel so deeply disconnected that they no longer see a reason to live. Often, the signs

are subtle – someone becomes quieter, more reactive, withdrawn or worried. Perhaps we did not notice.

We know when someone is online, where they travelled and what they celebrated. But do we know when they are troubled? As tech and AI become a bigger part of our lives, let us ensure they never replace the deep human connection of care and compassion.

Think of a family sitting together for dinner. Everyone is looking at a screen. We are physically together, yet mentally distanced. A loving conversation, a patient listener or simply someone saying, ‘I am with you,’ can heal the mind more than we realise. Raksha Bandhan rituals show us how to strengthen that connection.

● **Tilak** | Applied on the forehead, it reminds us that each one of us is conscient energy, a soul on a journey, carrying

complex emotional patterns, experiences and karmic connections across many lifetimes. This awareness first transforms us. Our judgement gives way to understanding, expectations become acceptance, and we naturally radiate love, respect and empathy.

● **Rakhi** | As we tie the thread, let each of us take a pledge of the much-needed emotional protection in all our relationships: ‘I am always available for you. I understand you. I stand by you.’ As we create these intentions, we become more compassionate and emotionally powerful.

● **Sweets** | They remind us to bring sweetness into our words, tone and interactions. A colleague who has made a mistake, a friend who is not responding, or a family member who behaves differently from usual may be carrying emotional baggage we know nothing about. Our

words of kindness and care become an energiser for them – and for us too.

● **Gifts** | The greatest gift today is our undivided attention – keep gadgets aside every evening and be fully present with family. Even at mealtimes, let us put away our phones and switch off the television. Call or visit relatives and friends on special days instead of sending a forwarded greeting.

● **Blessings** | Every blessing begins with a thought. Let us do a karmic check every night, forgiving people and seeking forgiveness. Let us create a thought of the quality we want to see in them, as a blessing: ‘You are a perfect soul. You are polite and respectful. Your every karmic is accurate.’ Our blessings create pure vibrations that uplift their energy, gradually changing their nature.

The rakhi may remain on the wrist for a few days. But the thread of attention, acceptance and affection can strengthen our bonds for a lifetime.

IN THE NEWS

GOYAL TO VISIT US FOR G20 MINISTERS MEET

COMMERCE AND INDUSTRY Minister Piyush Goyal will visit the US in late September to attend the G-20 Trade Ministerial in Milwaukee and hold bilateral talks with USTR Jamieson Greer, with trade pact issues to figure in the discussions, an official has said.

EXPORTS TO TOP \$25 BILLION IN AUGUST 1-21

THE NATION'S merchandise export during August 1-21 is estimated to rise by 15% to more than \$25 billion, an official said on Wednesday. During April-August 21 this fiscal, the exports crossed \$200 billion, the official said. The commerce ministry will release the exports and imports data for August formally next month.

Ex-Powergrid chief Tyagi elected as member of CIGRE

R K TYAGI, director general of the Power Foundation of India (PFI) and former chairman and MD of Powergrid, has been elected as a member of the Administrative Council of the International Council on Large Electric Systems (CIGRE). The election took place during the ongoing CIGRE Session in Paris.

Centre set to sell onions at ₹ 35/kg in Delhi

THE CENTRE WILL begin retail sale of onions at a subsidised rate of ₹35 per kg in the national capital from Thursday, in a bid to check prices that have surged to ₹55-60 per kg in several cities across the country.

Rice exports to 26 markets top 3 year average

India's rice exports to 26 priority markets exceeded their three-year average in the five months following the 2025 Bharat International Rice Conference.

AGENCIES

JAPANESE FIRMS INVEST OVER ₹1 LAKH CRORE IN INDIA IN 10 MONTHS

Japan may meet ₹7-L crore India pledge in 4 yrs: Goyal

MUKESH JAGOTA
New Delhi, August 26

JAPANESE FIRMS HAVE pumped over ₹1 lakh crore into India in just 10 months, fulfilling nearly 15% of Tokyo's 10-year, 10-trillion-yen investment pledge announced in 2025, Commerce Minister Piyush Goyal said on Wednesday.

Speaking to reporters in Tokyo, Goyal expressed confidence that, at the current pace, the entire ₹7 lakh crore (10 trillion yen) commitment will be realised within three to four years, well ahead of its decade-long target.

"Last time, Japan set a target of investing 5 trillion yen in India over 10 years and achieved it within five years," Goyal noted, adding that the rapid capital deployment prompted the doubled target set in 2025.

Prime Minister Narendra Modi has set an ambitious goal of doubling the footprint of Japanese enterprises operating in India from 1,500 to 3,000. Goyal urged Japanese firms to expand beyond traditional sectors into manufacturing, financial services, insurance and pension funds to leverage India's scale alongside Japanese precision engineering.

Addressing the India-Japan



Union Commerce Minister Piyush Goyal during a meeting with Mitsubishi UFJ Financial Group (MUFG) Deputy Chairman Yasushi Itagaki, in Tokyo on Wednesday

...proposes India-Japan 'Shark Tank' style series

COMMERCE MINISTER PIYUSH Goyal on Wednesday proposed an India-Japan startup pitching series, on the lines of the popular 'Shark Tank' format, to connect young startups from the two countries with investors and

potential business partners.

Goyal said such pitching sessions could be organised virtually, leveraging digital connectivity, to facilitate greater interaction between Indian and Japanese startups.

— PTI

Startup Roundtable in Tokyo, Goyal proposed establishing a Deep Tech Capital Corridor to mobilise patient capital for

early-stage research, deep-tech innovation and commercialisation. Along with capital linkages, the minister also sug-

gested a Two-Way Innovation Bridge connecting universities, incubators, R&D institutions, laboratories and testing facilities in both countries.

The other proposal focused on Manufacturing and Technology Integration, combining India's scale, engineering talent and entrepreneurial dynamism with Japan's precision engineering, technology and manufacturing capabilities.

He also stressed the need to set up Joint Startup Pitching Platforms to facilitate regular interactions among Indian founders, Japanese corporations, venture funds and strategic investors.

Sugar prices rise to ₹65/kg in retail market

PRESS TRUST OF INDIA
New Delhi, August 26

SUGAR PRICES ROSE for the second day in a row on Wednesday by over ₹1 per kg in the retail market due to an uptick in festive demand, according to government data. Retail prices of the sweetener continue to be high despite a nearly 20% decline in ex-mill rates after the government's decision to allow imports of 1 million tonne of raw sugar.

As per the data compiled by the Department of Consumer Affairs (Price Monitoring Division), the all-India average rate of sugar is ₹65.05 per kg on August 26 as against ₹63.97 per kg on Tuesday.

The current average price of sugar is 34% higher from ₹48.68 per kg a month back, while the rate is 41% more than the year-ago level, when sugar was available at ₹46.27 per kg. The data showed that the maximum selling price on Wednesday was ₹76 per kg, while the modal rate was ₹65 per kg. The wholesale price of sugar also rose marginally to ₹60.36 per kg.

Separate filings mandatory for foreign firms, says govt

MANU KAUSHIK
New Delhi, August 26

THE GOVERNMENT HAS clarified that there is currently no automatic data-sharing mechanism between the Ministry of Corporate Affairs (MCA) and the Reserve Bank of India (RBI) for the registration of foreign companies. In a frequently asked questions (FAQ) document on the registration of foreign companies and subsidiaries of foreign bodies corporate, the MCA said the documentation requirements of the two regulators are different.

RBI approval, therefore, does not replace separate MCA filings and documentation. The clarification comes as foreign companies operating in India are required to comply with both the Companies Act and foreign exchange regulations.

The ministry said the National Single Window System (NSWS) can help foreign companies identify the approvals they need, but it does not replace MCA filings or approvals from sectoral regulators. Foreign companies must continue to file Form FC-1 along with the necessary regulatory approvals, including those required from the RBI under the Foreign Exchange Management Act (FEMA).

The MCA has also clarified that a foreign company can operate outside the exclusive categories of branch office (BO), liaison office (LO) or project office (PO) under the Foreign Exchange Management Act

REGULATORY CLARITY

■ **No auto-sharing:** MCA says RBI approvals do not automatically flow into MCA registration filings



■ **Foreign entities** must file Form FC-1 with required regulatory approvals, including under FEMA

■ **The National Single Window System** can flag approvals but does not replace MCA or sectoral filings

■ Foreign companies need a resident representative for legal notices, not necessarily an Indian director.

■ An India-incorporated firm remains an Indian company even if wholly owned or acquired by a foreign entity

(FEMA). If a foreign company's presence in India falls outside these categories, the Registrar of Companies (RoC) may seek clarification on the nature of the establishment, it said.

Typically, a foreign company establishing a physical presence in India without incorporating an Indian subsidiary uses one of these FEMA structures. However, a large majority—estimated at 85-90%—of foreign companies still prefer to establish a separate Indian subsidiary. Such a structure provides greater operational flexibility, permits manufacturing activities and can offer access to lower domestic tax rates.

"A foreign company under the Companies Act is not required to fall exclusively into BO/LO/PO categories under FEMA, though most do," the MCA said in the document.

The ministry has further clarified that a foreign company does not need to appoint an Indian director. It must instead appoint one or more persons resident in India who can receive legal notices and other official communications. An Indian-incorporated company, however, must have at least one director who is resident in India, irrespective of the person's citizenship. "The law requires an authorised representative resident in India, not necessarily an Indian citizen or director," it said.

The MCA said that an Indian company does not become a "foreign company" simply because it is wholly owned by an overseas entity. A foreign entity that incorporates a subsidiary in India creates an Indian company, rather than a foreign company under Section 2(42) of the Companies Act.

Danish firms target larger role in India's naval shipbuilding

SAURAV ANAND
New Delhi, August 26

DANISH COMPANIES ARE eyeing a greater role in India's naval shipbuilding and maritime security ecosystem, as New Delhi steps up investments in naval capabilities and Denmark looks to expand cooperation in shipbuilding, naval systems and maritime technology.

"Security and defence, including on the naval side, will form a more integral part of the partnership," Denmark's Ambassador to India Rasmus Abildgaard Kristensen said during an interaction with reporters. The two countries recently held their first maritime security dialogue in Copenhagen, involving representatives from India's Ministry of External Affairs, the Indian Navy and Denmark's defence establishment.

Danish companies are already supplying equipment to the Indian Navy. Kristensen said Denmark has strong capabilities in radar and other naval sys-

MARITIME EXPANSION



■ **Denmark** sees scope for deeper naval shipbuilding & maritime-security cooperation

■ **Danish firm Terma** already supplies about 60% of India's coastal warning radars

tems, with Terma accounting for around 60% of India's coastal warning radars. The opportunity could widen as India expands its naval capabilities and the two sides move cooperation into more "trust-based" areas.

A Denmark-India feasibility study is also examining oppor-

tunities in naval and commercial shipbuilding, while Denmark is looking to facilitate engagement between its defence firms and Indian naval stakeholders.

Kristensen said Denmark's experience with modular naval vessels and the greater use of civilian or dual-use components could also be relevant for India. Using more civilian components in naval vessels can bring costs down because of economies of scale and make spare parts easier to source.

The envoy pointed to Denmark's modular approach to frigates, where equipment can be changed depending on the vessel's requirements. "This kind of modular thinking brings down the cost and gives more functionality to the navy," he said. The push comes alongside growing commercial shipbuilding cooperation. Shipowners have already commissioned around 10 vessels in India, totalling about 40,000 tonne, and more orders are expected as firms look to diversify.

Hormuz crisis adds \$22.5 bn to fossil-fuel import bill

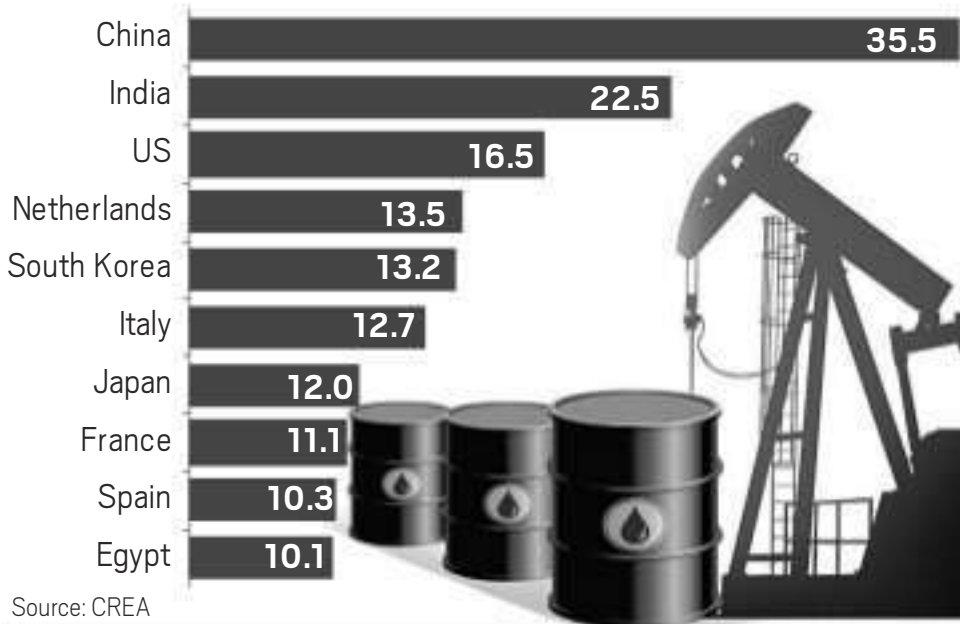
SAURAV ANAND
New Delhi, August 26

INDIA PAID AN additional \$22.5 billion for fossil-fuel imports between March and August 2026 as the Hormuz crisis drove up oil and gas prices, making it the second-most affected importing country globally after China and adding a fresh burden to the country's energy import costs. China faced the highest additional cost at \$35.5 billion, followed by India at \$22.5 billion and the US at \$16.5 billion. The Netherlands paid an extra \$13.5 billion, South Korea \$13.2 billion, Italy \$12.7 billion and Japan \$12 billion.

Crude oil alone accounted for \$164 billion of the additional global cost, with prices averaging a 35% premium over pre-conflict market expectations. Refined fuels saw even sharper increases. Diesel and gasoline prices were 59% higher, adding \$74 billion, while gasoline prices rose 43%, adding another \$36 billion.

SOARING COST

Additional fossil fuel import cost (\$ bn)



Source: CREA

Six months after the Hormuz crisis began on February 28, disruptions to global shipping and energy markets have added more than \$330 billion to fossil-fuel import bills, equivalent to around \$55 billion a month, the Centre for Research on Energy and Clean Air (CREA) said in a report. It termed this the largest sustained fossil-fuel price shock since the 1990 Gulf

War. The estimate compares what importing countries actually paid for seaborne crude, fuels and gas with what markets had expected before the conflict. Importantly, it excludes higher freight charges and war-risk insurance, along with pipeline gas, coal, fuel oil and naphtha, meaning these costs are not captured in the headline estimate.

SAURAV ANAND
New Delhi, August 26

INDIA'S LANDED COSTS for lithium iron phosphate (LFP) battery cells and containers were 13-23% higher than China's after-tax prices in July, as freight, duties and other import-related expenses added to costs amid a rapid expansion in grid-scale energy storage.

Landed LFP cell prices in India stood at \$62-67 per kWh (about ₹5,944-6,423 per kWh) in July, compared with about \$54.5 per kWh (around ₹5,209 per kWh) in China. This meant an additional cost of \$7-12 per kWh (approximately ₹671-1,150 per kWh) for Indian buyers.

According to a report by JMK Research & Analytics and IEEFA, a similar price differential was seen for assembled AC containers. The report attributed the gap to freight, duties and other import-related costs, and said local cell and pack manufacturing would help developers "avoid this import surcharge and reduce their reliance on Chinese supply."

IMPORT PREMIUM

■ **India's landed LFP cell prices** were 13%-23% above China's after-tax prices in July, adding \$7-\$12 per kWh in import costs

■ **314Ah LFP cell prices** in China fell 1.4% in July to \$54.5 per kWh, helped by lower lithium carbonate prices and ample supply

■ **India commissioned** about 8,236 MWh of BESS capacity in April-July FY27, alongside 250 MW of pumped hydro storage

The price differential emerged even as battery-cell prices softened in China. Average prices of 314Ah LFP cells, widely used in utility-scale battery energy storage systems (BESS), fell 1.4% month-on-month in July to CNY0.370 per Wh, or about \$54.5 per kWh.

The decline was aided by a 10.7% month-on-month fall in lithium carbonate prices,



■ **Domestic downstream capacity** reached 6.35 GWh in July, led by Waaree ESS and Midwest Energy, but commercial cell manufacturing remains limited

■ **The government** has tendered the remaining 10 GWh of ACC capacity for grid storage, requiring 25% local value-add in two years and 40% in five

expectations of additional supply following the restart of Chinese battery maker CATL's Jianxiawo mine, ample availability of 314Ah cells and stronger bargaining power among buyers.

Prices of integrated two-hour liquid-cooled AC containers, however, remained unchanged at \$85.7 per kWh (about ₹8,216 per kWh). The roughly \$30-per-kWh differ-

ence between an LFP cell and an assembled container reflects the additional equipment and services required for grid-scale deployment, including power conversion systems, thermal management, fire safety, energy-management systems, commissioning and warranties.

The import premium assumes significance as India's storage deployment

accelerates. The country commissioned around 8,236 MWh of BESS capacity during April-July FY27, alongside 250 MW of pumped hydro storage. July alone saw about 710 MWh of ESS capacity commissioned.

Domestic manufacturing also expanded, with about 6.35 GWh of downstream capacity becoming operational in July.

Waaree ESS accounted for 5.15 GWh through its container plant, while Midwest Energy added a 1.2-GWh integration facility.

However, the report said commercial cell manufacturing in India "remains limited", leaving the country's BESS industry substantially dependent on imported cells.

The Ministry of Heavy Industries has meanwhile tendered the remaining 10 GWh under the 50-GWh advanced chemistry cell (ACC) battery production-linked incentive scheme exclusively for grid-scale storage. The tender requires domestic value addition of 25% within two years and 40% within five years.

Capex with care

Capital discipline is welcome, but must not become an excuse for excessive caution

KUMAR MANGALAM BIRLA'S recent defence of corporate India against the charge that it is reluctant to invest is timely. Companies, he argues, remain strongly bullish on India's prospects; what is sometimes read as hesitation is really capital discipline. The distinction matters. The debate over the supposedly "missing" private capex cycle too often assumes that optimism must immediately produce new factories and large projects. Investment, however, is not an expression of confidence alone. It is a commercial decision based on demand, capacity utilisation, and returns. Corporate India learnt this painfully during the previous investment boom, when exuberant borrowing and poorly conceived projects left companies overleveraged, banks burdened with bad loans, and assets stranded for years.

Private capex is moving again, but the recovery needs closer examination. Much of the visible momentum comes from a few large, deep-pocketed conglomerates capable of making long-horizon bets across renewables, digital infrastructure, electronics, and advanced manufacturing. That confidence is real, but it is very different from thousands of mid-sized companies independently deciding to invest in India's future. Beyond the biggest groups, private investment remains patchier. Smaller firms face uneven domestic demand, cheap imports, commodity-price volatility, high financing costs, and geopolitical uncertainty. The capex numbers, therefore, cannot yet establish whether India Inc as a whole has rediscovered its risk appetite or whether a handful of conglomerates are making the biggest bets they can afford while others keep watching. Concentrated confidence is also more fragile than broad-based investment rooted in demand across industries and regions.

The government should therefore resist treating caution as a problem that can be solved through exhortation. Its task is to make investment rational, not cajole companies into undertaking it. Stable trade policy is essential: businesses cannot build capacity when tariffs change abruptly or unfairly priced imports undercut domestic producers. Competitive logistics, reliable power, faster land and environmental approvals, predictable taxation, and consistent regulation would reduce project costs and uncertainty. The cost of capital matters too, particularly for mid-sized firms without access to the cheapest domestic and global funding. Deeper bond markets, quicker dispute resolution, and fewer financing frictions are essential if the capex revival is to extend beyond corporate India's top tier. Stronger domestic demand is equally important. Public capex has created valuable infrastructure and supported activity, but it cannot indefinitely substitute for broad-based consumption and private investment. Production-linked incentives have delivered results in areas such as mobile phones, but they must build competitive supplier ecosystems rather than permanent dependence on state support.

Yet Birla's argument also places an obligation on corporate India. Capital discipline cannot become a respectable euphemism for excessive risk aversion. Companies cannot wait for capacity utilisation to reach its limit, demand to become certain, and every policy risk to disappear. By then, the opportunity may have passed. With leverage lower, cash flows stronger, and the banking system capable of funding sound projects, businesses have room to invest ahead of demand where India possesses durable advantages — in renewable energy, pharmaceuticals, speciality chemicals, electronics, defence, food processing, and digital infrastructure. Large companies must also draw smaller suppliers into these investment networks, diffusing technology, orders, and confidence through the economy. The true measure of a capex revival is not the value of projects announced, but how widely productive capacity, jobs, technology, and exports are created. India needs neither reckless expansion nor permanent caution. It needs capital deployed broadly, productively, and with care.

Time for a total reboot

THE RBI SUDDENLY announced that it would close the foreign currency non-resident (bank) window earlier than planned since the mop-up of dollars was more than anticipated. This set the cat amongst the pigeons with most people wondering why they had done this. Interestingly, despite inflows of more than \$50 billion in a little over two months, the reserves rose by hardly \$7 billion. Clearly, rather than selling the incoming dollars in the spot market (which would have led to rupee appreciation), the RBI must have used these to close out some of its forward sales, earning some premium which would off-set part of the subsidy provided by the central bank on the scheme.

Thus, unlike in 2013 (the last time such a scheme was launched) when the rupee appreciated by nearly 5% over three months and nearly 9% over six months, the rupee has been largely steady.

This also suggests the RBI is more or less comfortable with the rupee's current value, which is a bit surprising since it is well known that on a real effective exchange rate basis, the rupee is over 10% undervalued. Indeed, the weak rupee is beginning to impact many of the much-heralded PLI projects, including the India Semiconductor Mission, that are part of the government's *Viksit Bharat* plan.

To my mind, this is not the kind of signal the RBI should be giving, particularly when we have just come off the major trauma of the past few months with the rupee crashing by more than 6% since the start of the year, reinforcing the long-held belief that the rupee can only weaken going forward. The RBI should be working to prevent the build-up of a "one-way street" mentality, which is not only self-fulfilling but also creates untenable pressure on the reserves, making these kinds of expensive schemes necessary.

Significantly, "the-rupee-will-always-fall" mentality exacerbates the pressure on the rupee through leads and lags — where importers rush to hedge while exporters hold back till the last minute. Several analysts have estimated that \$150-185 billion of the decline in the reserves was made up of exactly such leads and lags; one author suggested a wonderfully creative way to address this — by charging an additional cash reserve ratio on import cover. This would increase the premiums on the import side, which would certainly slow down import hedging and, likely, increase export sales, which would keep the rupee from falling further, and may even lead to the much-needed appreciation.

There are many sound ideas like this being propounded by analysts, including the crying need to increase liquidity in the debt markets by changing the taxation of medium-term debt income to capital gains, which would not only increase the flow of investment to MSMEs, but would also make Indian debt more attractive to foreign portfolio investors, again easing the pressure on the rupee.

Another interesting aspect about the current scheme is that the RBI seems comfortable with investors using leverage — even SBI is announcing that it is happy to provide it. In 2013, most of the deposits were, indeed, leveraged, but it was undertaken quietly. Because of the leverage, the RBI needs to provide only a modest jump over US rates, which is good since it saves us money. It highlights the reality that NRIs, at least, are quite comfortable with India risk, at least as far as the financial sector is concerned.

Unfortunately, in the real sector which creates jobs — one of our many number one problems — India's risk appears to be almost unsurmountable. It is well known that over the past several years net FDI has been largely flat — in other words, global investors are really not interested in investing in India, and have not been since around 2011. Net FDI as a percentage of GDP has moved between 0.7% and 2%, averaging 1.5% over the past 16 years, sharply down from the peak of 3.6% of GDP in 2008.

Tragically, but hardly surprisingly, domestic private investment, too, has been flatlining at around 12% of GDP for over a decade (as compared to 25-28% globally).

Clearly, we are doing something — or several things — wrong. It's time for a complete reboot of Indian economic policy.



JAMAL MECKLAI

CEO, Mecklai Financial
www.mecklai.com

● BANKING REGULATIONS

INDIA ADOPTING BASEL III TO THE LETTER, RIGHT WHEN THE REST OF THE WORLD IS WATERING THEIRS DOWN

Wall Street folded, RBI held

GIVE ME A lever long enough and a fulcrum on which to place it, and I shall move the world," Archimedes famously declared. Central bankers aren't exactly known for their dramatic flair — their speeches are usually designed to cure insomnia. But they know exactly what the Greek mathematician meant: unchecked borrowing can move the global economy, usually right off a cliff.

The RBI's August 2026 consultation paper — Eleventh Amendment Directions — is a high-stakes game of regulatory poker. India is adopting global banking rules (Basel III) to the letter, right when the rest of the world is watering theirs down.

Bank safety rules come in two flavours. The clever ones say a bank should set aside less against a government bond than against a loan to a shaky startup. Then there's the leverage ratio — the sledgehammer. It doesn't care what you own. It just asks how big your pile of assets is, and how much of your own money sits underneath it to absorb losses. A hard floor beneath the clever rules, which banks have always been rather good at gaming.

India's floors aren't moving: 4% for the biggest banks, 3.5% for the rest, both above the 3% global minimum and both unchanged since 2019. The drama, effective April 2027, is how you count the pile — plus a new straitjacket for Indian branches of foreign giants.

Where the RBI gets an A+

Let's be honest: almost nothing here is original. The emergency escape hatch for money parked at the central bank (reserves) is lifted from Basel. The formula for measuring derivatives? Standard issue. The disclosure forms? A line-for-line copy.

That's exactly the point. The RBI's great virtue is stubborn fidelity to a text wildly out of fashion everywhere else. Consider the alternatives. Europe had written the escape hatch into law, used it

when Covid hit, and switched it off again in 2022 — orderly in, orderly out. Britain went further, permanently taking central bank money out of the calculation in 2016 and raising its minimum to 3.25% to compensate. America had written down nothing: it improvised an emergency rule in 2020, let it lapse in 2021,

then spent years relitigating the wreckage in the Treasury market, an argument concluded only this April. That's the case for writing the fire drill before the kitchen catches fire. And the RBI adds a sensible catch: use the escape hatch, and the minimum goes up to compensate, so nobody quietly loosens the safety net.

Then there's the neat fix for "window dressing" — shrinking your riskiest short-term book the night before results day, then piling back in the morning after. The draft makes banks publish the quarter-end number, the daily average, and an explanation of why the two diverge. The RBI isn't policing this daily itself; it's putting the numbers on the table and outsourcing discipline to the market. Good luck explaining a convenient 40% dip to investors with a straight face. One loose thread: banks must clear the minimum at all times, yet measurement is quarter-end unless the RBI permits otherwise. Making averaging the

default would close that gap for nothing.

Where it gets harder

The leverage ratio is deliberately blind to risk. That isn't sloppiness; it's the design. Before 2008, banks got very good at loading up on whatever the rules treated as harmless, sovereign paper included — which is exactly why carving out an exception for government bonds would reopen the loophole the sledgehammer slams shut. Silicon Valley Bank died in 2023 holding impeccably safe Treasuries. Zero credit risk, fatal interest rate risk. So no, the RBI isn't "penalising" banks for obeying the rule that forces them to hold government bonds. Those bonds have sat in the denominator in full since 2019. This draft doesn't touch it.

The sharper worry is harder to dismiss. Because G-secs are treated as risk-free, a bank stuffed with them looks wonderfully safe on that measure while its leverage ratio doesn't budge — so the sledgehammer bites first. Most Indian banks sit comfortably clear. Some public sector banks with heavy bond books could sit closer than they'd like.

Hence the asymmetry worth raising in the consultation: the emergency valve covers balances parked at the RBI, not gov-

India's floors aren't moving: 4% for the biggest banks, 3.5% for the rest, both above the 3% global minimum and both unchanged since 2019. The drama, effective April 2027, is how you count the pile — plus a new straitjacket for Indian branches of foreign giants



Former Executive Director, Nomura, alumnus of Harvard Business School, and a visiting faculty at B-schools

Participation is India's problem, not growth



RAVI VENKATESAN

Chairman, Global Energy Alliance for People and Planet, and Founder, Global Alliance For Mass Entrepreneurship

CHANNAVA USED to earn a daily wage, cooking and selling what she could after someone else's shift ended. A solar-powered stove and a small loan changed the arithmetic of her day — more hours to cook, a lower cost per batch, enough surplus to turn a side hustle into a business. A few villages over, Kamalavva's sewing machine now runs on solar power too; she works faster and it costs her less in strain on her body. Anand's forge, once at the mercy of an erratic grid, runs on the sun, and his blacksmith trade, the kind of work economists file under "informal, low-productivity, will disappear", is instead what feeds his family.

None of these are dramatic stories. That's the point. *Viksit Bharat*, India's ambition to become a developed economy by 2047, will not be won by a few more unicorns or a couple more world-class firms. It will be won or lost in millions of small transactions like these. India's challenge is no longer primarily to grow fast. It is to broaden who gets to participate in that growth.

That reframing changes what we should be arguing about. The first phase of India's rise ran on liberalisation, demographics, and capital. The next phase has to run on productivity — and three forces are converging to make that possible: artificial intelligence (AI), clean and distributed energy, and digital pub-

lic infrastructure. Together they could deliver India's biggest productivity leap since 1991. In Andhra Pradesh's tribal highlands, roughly 1.2 lakh coffee farmers in Paderu and Araku are being brought onto a single app that handles compliance and market access, turning subsistence growers into participants in a formal, traceable supply chain. That is

Business needs to show up as a capability builder, not a CSR donor: its supply chains, technology, and management talent are worth more to an ecosystem than a grant cheque

Vandana Yadav turned an idea and a state-backed loan into a working cold-pressed oil mill. That is not a hobby business — multiplied by tens of millions, that is what India's employment agenda actually looks like on the ground. Mass entrepreneurship isn't a side story to India's growth. It is the central tale.

The third shift is geographic. The next trillion dollars of India's GDP cannot come only from Bengaluru, Hyderabad, the NCR, and Mumbai. It has to come from district India. West Godavari's new entrepreneurship mission, launched in the presence of the finance minister, is targeting 5,000 new enterprises and 25,000 livelihoods over five years, building on a similar effort already under way in Visakhapatnam. The district, not the metro, is the right unit for this next

phase of development.

Which brings us to who actually benefits. Rekha Sen is not a banker or a bureaucrat. She's a former self-help group member in a Rajasthan village, trained as a "Vitta Sakhi" to help other women navigate loan paperwork — and in three months she helped 15 women secure loans ranging from ₹75,000 to

₹5 lakh. More than 860 women like her are now doing this work across three states. This is what the idea of "women's entrepreneurship is India's biggest untapped growth opportunity" looks like once it stops being a line in a strategy deck. It looks like one woman helping the next one fill out a form.

None of this happens through government support alone, and it shouldn't. Philanthropy's job is to be India's R&D incubator — absorbing the risk of testing what doesn't yet work, whether that's AI for informal workers or new models for women's market access, so the government can scale what's proven and markets can commercialise it. Business needs to show up as a capability builder, not a CSR donor: its supply chains, technology, and management talent are worth more to an ecosystem than a grant cheque. Civil society is the connective tissue that makes all of it reach the last village.

When historians look back on whether India actually became *Viksit Bharat*, they won't be checking whether GDP crossed twenty or thirty trillion dollars. They will be asking whether Channava, and the tens of millions like her, became more productive, more prosperous, and more hopeful. Get that right, and the GDP number takes care of itself. Get it wrong, and no GDP number will matter.

ernment securities. In a genuine stress episode — exactly when the RBI would want banks hovering up sovereign paper — no relief exists, not even temporarily. Britain's fix isn't a direct precedent, since it covers central bank money rather than bonds. But it establishes the principle: identify a structural distortion, deal with it permanently, and raise the minimum to compensate. The RBI has the harder version of the same problem and has reached for neither remedy.

Second, the foreign branch rules. A branch has no shareholders and pays no dividend. "Retain 100% of earnings" really means "stop remitting profits to head office" — with tax and treaty complications the draft never addresses. Worse, a Mumbai branch's requirement is 3.5% plus whatever buffer its home regulator prescribes. Washington has just eased its own requirements, which means India's effective floor for a foreign branch has loosened without anyone in Mumbai deciding anything. A domestic override, or simply a floor beneath the borrowed number, would keep the judgement where it belongs.

Finally, the Bank of England is consulting on a lower floor paired with a buffer that can be switched off in a downturn, freeing banks to lend rather than hoard. Given the RBI's evident thinking on flexibility, the same instinct applied to buffers is a natural next question.

The verdict

The direction is undeniably right. The RBI isn't reinventing the wheel; it's enforcing global standards while its peers negotiate exemptions from them, and that stubbornness is worth its weight in gold. The unfinished business is what a consultation exists to surface.

As Archimedes might observe, a well-placed lever stabilises a structure as easily as it topples one. The RBI has built a sturdy fulcrum. It just needs to check where its thumb is.

Inclusion doesn't trickle down from productivity boom, it has to be engineered into it; India also needs to build livelihood systems & focus on districts for development

LETTERS TO THE EDITOR

Household savings

Apropos of "Tap household savings for growth" (*FE*, August 26), Indian households are shifting their savings from traditional bank deposits and physical assets towards market-linked financial assets such as mutual funds. The surge in investor base and drop in deposit share in recent times are testimony to this. However, a lot still needs to be done because physical assets like real estate and gold still command around 70% of household savings. Schools, colleges, workplaces, banks,

and all digital platforms should explain compounding, risk diversification, and inflation in layman terms. Preferential tax treatment for long-term investments in equity mutual funds and regular SIPs should be the order of the day. Risks associated with fixed deposits and mutual funds should be explained by banks, post offices, and financial intermediaries, especially in tier-II and -III cities. —Bal Govind, Noida

H-1B fee fears

Apropos of "H-1B fee plan threatens IT

playbook" (*FE*, August 26), the proposed US fee of \$103,265 on new cap-subject H-1B petitions could alter the way Indian IT firms deploy talent in the US. While large technology firms may be able to absorb the additional cost, smaller companies and firms with large numbers of employees travelling from India could face considerable pressure. The move may encourage Indian IT to reconsider the traditional practice of sending employees to the US for short-term assignments. More projects could instead be handled by teams based in India, reducing costs

while strengthening India's position as a technology and delivery hub. Companies may also become more selective in sponsoring new H-1B workers and rely increasingly on hybrid models. The proposal, however, should be examined carefully for its wider implications. Excessive costs hit affect American businesses that rely on skilled foreign workers. A balanced immigration policy is essential to protect US interests without any disruptions. —Sanjay Chopra, Mohali

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Editor's
TAKE

Himalayan catastrophe

The warming of Himalayas is turning them into a ticking time bomb; only concerted action by Nepal, India and China can avert disaster

On the morning of August 26, a slab of glacier broke off a mountainside on the Nepal-Tibet border, crashed into a valley and blocked the Lhende River. The lake it formed burst almost instantly, sending ice, rock and water down the Bhote Koshi and Trishuli rivers into Nepal's Rasuwa and Nuwakot districts, and across into Tibet's Gyirong County. Nepal's police have confirmed over 160 dead and hundreds missing, among them more than a hundred Indians, many on the Kailash Mansarovar pilgrimage, and foreign nationals from half a dozen other countries. Bridges, highways and roughly an eighth of Nepal's hydropower capacity were knocked out within minutes.

The immediate trigger was natural, violent enough that seismographs first mistook it for an earthquake. But natural is not the same as normal. Nepal's glaciers are retreating up to 15 metres a year, and glacial-origin floods across the Hindu Kush Himalaya, once expected roughly once a decade, numbered three in just two months last year, according to ICIMOD, the region's mountain-research body. What has shifted is temperature, not geology.

Layered on top is a man-made factor: hydropower stations, roads and settlements pushed into unstable valleys with almost no early-warning cover, in a country that emits less than a tenth of one per cent of the world's carbon. Cutting the toll of the next flood, and there will be one, means treating glacial lakes as the infrastructure risk they are: systematic mapping of the region's most dangerous lakes, sensor-based warning systems extended from a handful of pilot valleys to every settlement below a glacier, zoning that keeps construction off riverbanks, and hydropower design built for catastrophic failure, not average monsoon rainfall.

Nepal and its neighbours have already piloted much of this; what's missing is scale and money. This flood crossed from Tibet into Nepal in minutes, and from Nepal into India within hours, since the Trishuli becomes the Gandak, putting Bihar on flood alert before rescue teams had finished searching Rasuwa.

A hazard indifferent to borders needs cooperation that matches it: real-time hydrological data-sharing between Nepal, China and India, built on existing frameworks such as ICIMOD's glacial-lake inventories and the Koshi Basin Initiative, not one-off goodwill after each disaster. The UN's response has followed the standard emergency script: Secretary-General António Guterres's condolences, followed swiftly by the WFP, WHO, UNICEF, UNDP and OCHA deploying rations, medical kits and satellite mapping.

Nepal needed monitoring and money years before this week, not sympathy after it. India moved with familiar speed: Modi's call to his Nepali counterpart Balendra Shah, the promise of all possible humanitarian assistance with NDRF teams on standby. India has as much at stake in Himalayan glacier monitoring as Nepal does. First response should now make room for first investment: shared early-warning networks, not relief flights after the water has fallen.

SCO Summit: India's Eurasian balancing act

As the Shanghai Cooperation Organisation turns 25, its Bishkek summit comes at a time of deepening geopolitical turbulence. For India, the grouping is more than a regional forum: it is a crucial platform to advance strategic autonomy, counter terrorism, strengthen ties with Central Asia and secure connectivity across Eurasia while navigating the growing influence of China



PARUL
CHANDRA

The upcoming annual leaders' summit of the Shanghai Cooperation Organisation (SCO) at Bishkek in Kyrgyzstan, which PM Narendra Modi will attend, comes amid ongoing geopolitical shifts and strategic realignments that continue to trigger severe global economic consequences.

The motto of the summit on August 31-September 1 - '25 years of the SCO: Together Towards Sustainable Peace, Development and Prosperity' - serves both as an ambitious goal and a test of regional cooperation.

The summit takes place against a backdrop of global turmoil driven by Russia's long-drawn war with Ukraine and the unabating US-Israel-Iran conflict. Both Russia and Iran are SCO members. These conflicts have had a major impact on the global economy and the SCO motto, therefore, assumes even greater significance.

Over its 25-year history, the SCO has expanded considerably. It now includes 10 member states, two observer states and 15 dialogue partners that encompass a vast geographical area, diverse cultures and people. For India, SCO membership provides a crucial platform to pursue its strategic interests in the vast Eurasia region.

India transitioned from an observer state in 2005 to full membership in 2017 alongside Pakistan, whose inclusion was backed by its all-weather ally, China. The other full members include the Central Asian countries of Kazakhstan, Tajikistan and Uzbekistan. Its two newest members are Iran, which joined the grouping in 2023, and Belarus in 2024. Afghanistan and Mongolia serve as observer states.

Additionally, the SCO's 15 dialogue partners reflect the growing interest in the grouping. They are Egypt, Qatar, Kuwait, UAE, Bahrain, Saudi Arabia, Turkey, Nepal, Sri Lanka, Maldives, Myanmar, Cambodia, Lao PDR, Azerbaijan and Armenia.

With the 10 member states encompassing a huge geographical spread of around 36 million sq km and over 3.4 billion people, India recognises the geopolitical value of remaining deeply engaged in the SCO at both multilateral and bilateral levels. PM Modi, for instance, will be meeting Russian President Vladimir Putin, among others, on the margins of the summit.

India's SCO membership also underlines its strategic autonomy in participating in a non-Western-aligned forum alongside major powers like Russia and China. Membership ensures India



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NEXUS

The writer is a policy analyst who writes on foreign and strategic issues

a seat at the table, while keeping a close eye on China's regional ambitions and the China-Pakistan nexus.

As an economic powerhouse, China often seeks to dominate the SCO, which has its secretariat in Beijing. India consistently uses the platform to counter these dynamics.

At the SCO summit at Tianjin in China last year, India reiterated its opposition to Beijing's ambitious Belt and Road Initiative (BRI), with PM Modi emphasising that connectivity efforts "must uphold the principles of sovereignty and territorial integrity".

In a strong message to China, which has often used "salami slicing" tactics to encroach on territory India claims as its own, PM Modi also noted: "Connectivity that bypasses sovereignty ultimately loses both trust and meaning." India remains the sole SCO member state that does not endorse the BRI.

For India, SCO membership is both a strategic and economic imperative. PM Modi spelt out the three pillars upon which India's policy towards the SCO is predicated at the Tianjin summit last year: Security, Connectivity and Opportunity.

India's membership of the SCO is also critical for its connectivity strategy across Eurasia. With Pakistan blocking India's direct overland access to Afghanistan and beyond to Central Asia, New Delhi must explore alternative transit routes to these regions.

Building robust ties with the 'stans' of Central Asia, which India views as part of its extended neighbourhood, is crucial to balance China's heavy influence in the region. The SCO serves as a useful platform to find common ground with them on various issues, including connectivity, energy, security, trade, critical minerals and counter-terrorism.

It's noteworthy that en route to Bishkek, PM Modi will also be travelling to Uzbekistan, with

which it has robust defence cooperation, to build on its strategic partnership.

The 'stans' are particularly important for New Delhi's efforts at connectivity with Central Asia and even beyond to Europe. There is convergence of interests in this regard, with these landlocked nations exploring alternative routes for connectivity.

India has been banking on the INSTC (International North South Transport Corridor) as a vital connectivity link to Central Asia. The ambitious project, however, is a long way away from fruition.

India's plans to access these nations and Afghanistan via the Iranian port of Chabahar, too, have been in the doldrums owing to US sanctions and the current heightened tensions in West Asia. On the security front, the SCO provides India with a vital platform to draw attention to terror, especially emanating from Pakistan. Last year, for instance, India highlighted the terror strikes carried out at Pahalgalam in Kashmir by Pak-backed attackers. India acknowledges that the SCO-RATS (Regional Anti-Terrorist Structure), headquartered at Tashkent in Uzbekistan, has played a significant role in the fight against terrorism.

At the Bishkek summit, India will undoubtedly press ahead with its focus on counter-terrorism and regional connectivity. Additionally, as member states discuss establishing an SCO Development Bank to fund infrastructure, India will likely seek more clarity on its structure to ensure it aligns with territorial sovereignty principles. Ultimately, India's participation in the Bishkek summit is not merely a diplomatic routine. It's driven by a pragmatic focus on strategic autonomy, counter-terrorism, and Eurasian access. India should do its utmost to leverage the SCO to safeguard its own strategic interests and monitor regional dynamics.

PIC TALK



Revelers throw tomatoes at each other during the annual "Tomatina" tomato fight fiesta, in the village of Bunol near Valencia, Spain

PHOTO: PTI



RAJYOGI BRAHMA
KUMAR NIKUNJ JI

2ND OPINION

Over the last several decades, the topic of spirituality has come to the forefront of public and professional consciousness. With the dawn of a new century, spirituality has received increased coverage in the media and more discussion in the workplace, in politics and in education. To many, spirituality represents a necessary essence of life that energises both thoughts and actions.

To others, spirituality is a belief in a power operating in the universe greater than oneself. Still others define it as a sense of interconnectedness with all living creatures, and an awareness of the purpose and meaning of life. However, the lack of a universally accepted theory or definition of spirituality has created a lot of confusion as well as misunderstanding

in society. Many people confuse spirituality with religion and so bring pre-existing beliefs about the impact of religion to discussions about spirituality.

Though all religions emphasise spirituality as being an important part of faith, what really needs to be answered is whether it is possible to be 'spiritual' without necessarily being a part of an organised religious community?

Recognising the difference between spirituality and religion can be a great way to begin to understand what spirituality actually means.

Those people who profess their faith in Almighty and higher beings, in living life virtuously or in following the rituals pertaining to their faith are known as religious-minded. However, there is a difference between being religious and being spiritual. Even though books and information on spirituality have flooded the world, there is still a lot of vagueness and contradiction about knowledge of the soul, its original nature, abode and role in world drama.

The first step towards being spiritual is to be soul-conscious and be free from all limitations and bondages of the physical world.

A spiritual being is aware of his/her real identity - of being a soul and a child of the Supreme Soul - and is also aware of one's true nature of being peaceful, pure, blissful and loveful. When we play our worldly roles with this awareness, we live a truly spiritual life.

We also begin to see everyone as souls and, instead of creating karmic bondages in relationships, we begin to empower each other and remain detached and loving.

Self-realization is the goal of many spiritual schools of thought, but most people go beyond satiating their curiosity to learn something new, and once they learn it or experience it, their excitement fades and they start searching for other sources of intellectual stimulation.

A spiritual person always remains content with the self and devotes his time not to material pursuits but tends to remain in the company of the divine, thereby experiencing true love, peace and happiness which are more lasting than material attainments. Such a person will see everyone as souls; be loveful to every person in this world regardless of one's religion, country, gender and other physical traits.

When we would understand the above definition of a real spiritual being, we would be spiritually awakened and enlightened and get directly connected to the Supreme Being, who would lead us to the path of self-transformation, which would further lead to world transformation. So, let's embark on this journey of becoming a 'Spiritual Being' through self-realisation and introspection.

The writer is a popular columnist and a spiritual teacher

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FROM DEGREES TO LIVELIHOODS: EDUCATION FOR EMPLOYMENT

The NITI Aayog's August 2026 report, *Reimagining Skilling for Viksit Bharat@2047*, notes that early exposure to vocational options remains limited.

The National Education Policy (NEP) 2020 envisages vocational exposure for 50 per cent of students by 2025 and all students by 2030, but implementation remains at an early stage. It also points out that the lack of such exposure limits informed career choices and the development of foundational employability skills. Therefore, corrective action must begin much earlier. Vocational and practical skills should be strengthened in schools, enabling students to discover their aptitude, interests and potential career paths. At the time of college entry, professional career counselling, based on aptitude, emerging employment opportunities and

local economic needs, should help students make informed choices rather than simply pursuing generic degrees. Colleges should not be sustained merely to protect existing staffing patterns or fill seats by introducing additional courses; institutions with genuine potential should receive greater support. At the same time, higher public investment in infrastructure, manufacturing, healthcare services and other labour-intensive sectors is needed to create employment opportunities, strengthen livelihoods and encourage private investment.

Education must ultimately connect learning with meaningful work. A stronger focus on practical skills, career guidance and employment generation can help young people move from degrees to sustainable livelihoods.

BRIJ BHUSHAN GOYAL | LUDHIANA

Please send your letter to the info@dailypioneer.com. In not more than 250 words. We appreciate your feedback.

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THARCIOUS S FERNANDO| CHENNAI

VINEETH KUMAR | KERALA

LETTERS TO THE EDITOR

Raksha Bandhan: A bond beyond blood

Raksha Bandhan, or "the knot of protection", is here. Though the origin of Rakhi can be traced to the Mahabharata, with religious and historical references as well, the tradition of sisters tying rakhis around their brothers' wrists has transcended cultures and religions.

Rakhi is not just a thread; it is a promise tied with love and secured for life. It hinges on mutual respect, care and affection. It is a celebration of trust, companionship and the enduring bond between two people.

When women tie rakhis on the wrists of men who are not their biological brothers, they foster the magnificent Indian concept of "Vasudhaiva Kutumbakam", the much-celebrated Sanskrit phrase meaning "the world is one family". This "world is one family" is a much-needed emotion in troubled times. No race, religion or nationality should come in the way of people-to-people interaction and bonding. A brother-sister relationship comes from the heart, not from blood.

The bond between the two is sometimes tightly woven, at times loosely held, but never broken. They are siblings by chance, but friends by choice.

Parandur airport: Back to square one?

The decision of the Tamil Nadu Government, led by C. Joseph Vijay, to cancel the proposed greenfield airport at Parandur is disappointing and could have serious implications for the State's industrial growth.

The project had reportedly completed much of the necessary due diligence, with financial closure at an advanced stage. Major industries, including multinational companies located in and around Parandur, had welcomed the airport as a long-standing requirement.

The decision could send a wrong signal to potential investors and create apprehension that a change of government could also mean a change in policies. Such uncertainty may affect Tamil Nadu's ability to attract and retain investment.

The government has cited the interests of farmers as the principal reason for shelving the project. However, the reported statement that the 1,800 acres already acquired would instead be used for other industrial purposes raises questions about how farmers' interests are being protected. Tamil Nadu needs consistent and predictable policies. Major development projects should be assessed objectively on their long-term economic, social and environmental implications rather than being reversed to fulfil political commitments

Tackling motor insurance fraud

The Supreme Court's directive ordering states to establish dedicated Special Investigation Teams (SITs) highlights a deeply entrenched vulnerability within India's motor insurance framework. The investigation into a compensation scam of "enormous proportion" involving falsified vehicle accident records exposes a crisis that extends far beyond simple criminal deceit. It represents a systemic failure that inflicts severe, long-term economic damage on the nation's insurance ecosystem.

Fabricated claims and staged accidents artificially inflate payout liabilities for insurance companies. This rampant bleed drains underwriting reserves, distorts actuarial risk pricing and worsens loss ratios across the industry. Consequently, insurance providers are forced to adjust for these financial leaks by hiking premium rates. Honest, law-abiding policyholders are ultimately left to absorb the financial burden of a fraudulent minority through inflated annual costs. Furthermore, such widespread malpractices erode public trust in judicial compensation channels designed to aid genuine victims.

State-level SITs must combine prosecution with technology. Linking traffic, police and vehicle records can make claims verification tamper-proof, protecting insurers and consumers.

Himalayan tragedy: A disaster in Nepal, a warning for India

The disaster in Nepal is a stark reminder that natural hazards do not respect political borders. What begins as a catastrophe in a remote mountain valley can threaten lives and infrastructure in India. India and Nepal need to move from flood warnings to real-time, basin-wide impact forecasting and coordinated risk management



SATYENDRA SINGH

A catastrophic flash flood hit Nepal's Himalayan border area on August 26, killing people and causing massive destruction. Houses have been inundated; roads and bridges have been destroyed or washed away, and infrastructure like electricity have been affected. Rescue efforts are ongoing in inaccessible locations; meanwhile, it is still unclear how much damage the mega disaster has caused. However, this is not just Nepal's problem, but India's, especially Bihar and eastern Uttar Pradesh's. The reason is obvious: rivers carrying Himalayan waters do not recognise political boundaries.

So far, the exact reason for the flash flood is being investigated. According to initial findings, an ice-rock or glacial avalanche could have occurred, possibly along with a temporary river blockade and sudden releasing of huge amount of water, rock, and sediments. An earthquake is also one of the reasons. The idea of glacial lake outburst has so far not got enough evidence.

What should be remembered in general is that flash flood in the Himalayas is the ultimate result of a chain of events starting with glacier or slope instability, followed by river blockade and huge release of water, rocks, and sediments. The Himalayas are gradually turning into the sources of cascading disasters.

The present flooding started from the upper parts of Bhotekoshi/Lhende river system at the border between Tibet and Nepal. The flood wave travelled from the Bhot Koshi and Trishuli river systems to the Narayani and further down the river as the Gandak in India. This explains why there has been fear for the downstream areas of Uttar Pradesh and Bihar.

When the Rivers of Nepal Flow into India

To appreciate India's vulnerability, one needs to move away from the political map and consider the river-basin map. While politically Nepal and India are two separate countries, hydrologically they are one system. Himalayan water feeds the irrigation, domestic and ecological needs as well as livelihoods of millions, but if anything goes wrong in the upper basins, these very rivers can be transformed into destructive rivers.

Sarda, Ghaghra, Rapti, Gandak, Burhi Gandak, Bagmati, Kamla and Kosi are some of the rivers contributing to floods in Uttar Pradesh and Bihar that originate in or travel through Nepal. India and Nepal already have bilateral agreements concerning flood forecasting and water management. The present disaster is a good opportunity for strengthening them.

Gandak is particularly relevant to the present situation. Narayani River becomes Gandak when it enters India and travels through Uttar Pradesh and Bihar and finally meets the Ganges River. Bihar is also vulnerable to other Himalayan rivers such as Kosi, Bagmati, Burhi Gandak and Ghaghra.

An unexpected outburst after an avalanche, landslide, or flooding of a river due to the formation of a dam would give very little warning time. Hence, the early warning system should not only alert about the crossing of river levels by a river. It should also warn about which villages can be flooded, what infrastructure would be affected and where the search and rescue teams and aid materials must be deployed. India requires transitioning from hazard prediction to impact prediction.

The hazard environment in the Himalayas is changing. Changes in temperature and climatic conditions have influenced rainfall patterns and the behaviour of glaciers and slopes, while roadways, tunnels, hydropower plants, tourist destinations, and development in general are increasing in fragile regions. Satellite imagery, remote sensing, automatic devices, drones and artificial intelligence technology can help a lot in monitoring. But technology alone is not enough for preparedness. A warning displayed on a government dashboard is not very useful if it does not reach those affected by it. Villagers, farmers, schoolteachers and families have to know what it means and what needs to be done to protect themselves. Equally important is the local knowledge about which embankments will collapse first, which roads will become impassible and how floodwaters will inundate their villages. Thus, the goal should



be to define the affected population, identify critical infrastructure, evacuate routes and places, as well as position trained local teams and relief forces beforehand.

Lessons from Uttarakhand

The recent catastrophe in Nepal makes us recall a lesson that India had been taught earlier. The disaster in Uttarakhand clearly showed the interaction of heavy rains, floods, landslides, geological instability, settlements, infrastructure and development. The basic lesson learned was obvious: natural hazard turns into disaster due to the vulnerability of society.

The lessons teach us about zoning, restrictions on building in risky zones, Disaster Impact Assessment along with Environmental Impact Assessment, slope stabilization, protection of ecosystems, better warning systems and community preparedness. But still: do we learn from disasters or merely document them?

The solution does not lie in halting development. Connectivity, growth and security depend on roads, tunnels, hydropower and tourism infrastructure. The question is where and how such development happens.

Development in the mountains cannot happen in the same way as development on more stable terrains. Geomorphological and environmental assessment is crucial for any hydropower or tunnel project. Consequently, Disaster Impact Assessment must become a necessary element of infrastructure development in fragile Himalayan regions.

Nature needs to play a role in disaster-risk reduction as well. Forests, wetlands, stable slopes and healthy water catchments protect from erosion, runoff and siltation. Thus, their conservation and restoration should become complementary to engineering solutions.

Transboundary Himalayan Resilience Agenda

The Nepal tragedy proves one thing for certain: disaster resilience in the Himalayas must be transboundary in nature. India and Nepal must work together to create a Himalayan transboundary disaster risk management framework taking into account their shared hydrological basins. Satellite imagery, glacier and glacial lake assessment, avalanches and landslides monitoring, earthquake data, precipitation forecasts and river level monitoring should all be integrated into early warning and impact forecasting system.

The response has to be proactive, not reactive. There should be no need for downstream governments to react only after the disaster crosses the international border, but the warning must come before the flood does.

We have to shift our approach from relief to risk reduction, from hazard assessment to impact prediction, from project-level initiatives to regional water basin planning, and from national activities to transboundary cooperation.

Bihar and Uttar Pradesh should take note of this particular alarm. The lives of people downstream will rely heavily on choices being made thousands of kilometres away, perhaps even outside of India. The Himalayas are not only a natural dividing line between countries; they are a single, interconnected ecosystem.

While we cannot control our geography, we can definitely change the way we respond to whatever our geography may present to us. The real choice is not development versus disaster-risk reduction. It is risk-blind development versus risk-informed development. This was the message that Uttarakhand delivered to us, and Nepal's misfortune serves to reaffirm it. In case the Himalaya shakes, the plains must be ready. If we want to secure people, infrastructure, agriculture, energy systems and ecosystems of the Himalaya-Ganga basin, one rule must reign supreme: The river basin, not the political boundary, should be the basic unit of disaster-risk management.

The writer is former Executive Director, National Institute of Disaster Management, Government of India

After Red Corridor: India's post-Naxal challenge



VIKAS YADAV

For nearly six decades, Left-Wing Extremism remained one of India's most serious internal security challenges. Beginning with the Naxalbari movement in West Bengal, it developed into a prolonged armed insurgency across parts of central and eastern India.

In 2026, India reached an important turning point. On March 31, the Union government declared that the country had effectively achieved its objective of becoming free from Left-Wing Extremism. According to government data, the number of affected districts declined from 126 in 2014 to zero by March-April 2026. Naxal-related incidents also fell from 870 in 2014 to 234 in 2025, while fatalities declined from 310 to 100.

However, the decline in violence raises an equally important question: what happens after an insurgency loses its territory, weapons and organisational strength? The real challenge is to ensure that conditions enabling extremism do not return permanently.

India's approach has gradually moved beyond security operations towards a combination of security, development, governance and rehabilitation. The objective is not simply to establish security control, but to ensure that citizens experience the presence of the State through schools, hospitals, markets, public services and employment opportunities.

Bastar represents this transition clearly. For years, its difficult terrain and forests provided space for Maoist groups, while poor connectivity restricted the reach of government institutions. Yet reclaiming territory is only the first step. Roads must remain functional, schools need teachers, health centres require doctors and medicines, and young people need meaningful employment.

Rehabilitation is another major challenge of the post-Naxal phase. Security operations can weaken an armed organisation, but the long-term outcome depends on what happens to those who surrender. Education, vocational training, identity documents, housing, employment, psychological support and acceptance within society are necessary for genuine reintegration.

The experiences of surrendered cadres in Chhattisgarh illustrate this possibility. Some former insurgents have entered ordinary professions such as tailoring, plumbing and other service-sector work. Every former combatant successfully integrated into civilian life reduces the possibility of renewed recruitment and demonstrates that a peaceful alternative is available.

Another important issue is the possible participation of former Maoists in democratic politics. A democracy can accommodate radical or unpopular political opinions as long as political activity remains within the constitutional and legal framework. A clear distinction must therefore be maintained between political belief and political violence. The State must act firmly against violence, unlawful activities and links with armed organisations. This distinction is particularly important in the debate over who should be described as a "Naxal." Treating different forms of political activity as identical can weaken democratic debate. The most effective approach is one based on evidence, law and due process.

The post-Naxal challenge also extends into the information space. The weakening of armed groups does not automatically remove the narratives and grievances that contributed to their influence. Social media can spread political messages far beyond the regions where the insurgency once operated. Therefore, credible public communication is essential. The State must explain its policies, address legitimate grievances and demonstrate visible development outcomes, while security agencies identify genuine extremist activity without treating ordinary disagreement as a security threat.

Financial networks also require continued attention. Strong action against unlawful financing should strengthen, rather than weaken, public confidence in institutions.

Security agencies cannot simply withdraw after the declaration of a Naxal-free India. The more sustainable approach is a gradual transition from intensive counter-insurgency operations to normal policing and civilian administration.

Economic development will also be central to lasting peace. Businesses, cooperatives, self-help groups and skill-development programmes can create employment and alternatives to underground networks, particularly for young people and former insurgents. Communities with functioning markets, secure livelihoods, education and opportunities for advancement are less vulnerable to the appeal of armed politics. Ultimately, the success of an insurgency can be measured through statistics such as fewer attacks, deaths and affected districts. It is visible when children attend school regularly, patients can reach hospitals, farmers can access markets, young people find employment and former insurgents rebuild their lives.

India has made substantial progress in dismantling the armed infrastructure of Left-Wing Extremism. Yet the next phase will determine whether this achievement becomes permanent. The task now is to ensure that the vacuum left by insurgency is filled with roads, schools, jobs, accountable governance, democratic participation, justice and sustained public trust.

India may have moved beyond the era of the Red Corridor. The guns may be falling silent, but the real challenge is to ensure that peace, development and democratic participation take their place permanently across formerly affected regions and communities in the future.



The writer is an Assistant Professor of Political Science at the University of Delhi

Gen Alpha's AI shadow: Protecting the right to outgrow childhood data



ANURADHA PS

For previous generations, childhood slowly faded from their memory. For Gen Alpha, it may become something that machines remember. Search engines, recommendation systems, digital classrooms and AI tutors as part of everyday learning do more than just capture the things children do: they infer what they do, predict what they like and create opportunities for them. This is the start of an 'AI shadow' — a series of guesses and presumptions that a machine draws from a child's online footprints. This is important, as AI continues to grow up quicker than the organisations that regulate it.

The child that India is today is an impressive digital kid. According to the Annual Status of Education Report (ASER) 2024, 89.1 per cent of adolescent youths aged 14-16 mentioned they had a smartphone in their home. However, how they use that access demonstrates it: 76 per cent of them use their smartphones most often for social media, and only 57 per cent use them most often for educational purposes. This is also highlighted in UNICEF India's guidance, which states that access to the internet still has to catch up with the institutional infrastructure, as only 63.5 per cent of schools in India have internet facilities as part of

their infrastructure. A study conducted by UNICEF U-Report also reveals that 40 per cent of young people use the internet for more than four hours a day. The key change is not that kids are growing up digital, however. Digital interaction is becoming a regular component of childhood architecture. AI is now taking things one step further.

India's experience is part of the global shift. In June 2026, a UNICEF analysis found that at least 20 million children had used AI across 10 countries. About 13 million used AI for studies and homework, while over 2 million used it for guidance on personal matters. AI has become part of childhood, offering opportunities such as personalised tutoring, one-to-one support and help in identifying learning gaps.

UNICEF's Guidance on AI and Children 3.0 acknowledges this potential but cautions that evidence on AI's impact on children remains limited. It urges 'child-centred' AI systems that safeguard children's rights, privacy, development and autonomy. The more personalised AI becomes, the more information it requires. An AI tutor can identify what a child struggles with, what interests them and which explanations work. This can make it an effective teaching aid, but also create an 'AI shadow'. If algorithms repeatedly predict what a child can or should do, those predictions may influence future choices.

Not all of these risks are equal. The first digital divide was in part access, coupled with access to a device and connection or electricity. The second was skills - who knew how to use technology effectively. The new polarisation may be one over the interpretation, who is interpreting them with tech-



nology. In a recent report, UNICEF stated that unequal access to and skills with digital technologies can exacerbate inequalities in childhood: 'Childhood in a Digital World'. It also has some more recent AI evidence, as children were more than three times more likely than their parents to say they had used AI across the 10 countries studied. In most of these countries, at least three-quarters of parents/caregivers were never users of AI, thus creating an AI usage divide within the family. If a parent is not familiar with the AI environment, it's difficult to guide a child through it. The disparity in AI use could thus not just be between children with access to AI and children without access to AI.

International law and the data-protection regime in India already acknowledge that children should be afforded special protection. The Digital Personal Data Protection Act, 2023, Section 9, mandates, for the processing of a child's personal data, that their verifiable consent be obtained, and pro-

hibits tracking, behavioural monitoring and targeted advertising directed at children, except under narrow exceptions. The Rules were further modified in 2025 to include a few exceptions for the safety and welfare of children. These are key safeguards. However, AI poses a more challenging question than traditional data protection: How to protect information that is not directly disclosed?

UNICEF's new guidance is very clear about this. It calls for the storage of children's data for as long as necessary, to ensure that data gathered regarding a child does not accompany him/her when he/she grows up. It also requires transparency, accountability, fairness and child protection with regard to children's developing autonomy. It indicates a principle which India needs to take seriously: developmental data minimisation. Gather materials required for a child's learning and/or security. Keep it as short a time as possible. Don't let childhood behavioural profiles go undocumented. Then the "algorithmic forgetfulness" principle should be in place. Children should be given the opportunity to develop beyond the machine's understanding of themselves. This is really a 'right to be wrong' thing. One of the greatest assets of AI is its ability to recognise patterns. Change is the strength of childhood. The risk is that a system designed on the basis of AI will end up categorising what the child is good at today as what he or she should be tomorrow. The impact of AI on children's cognitive development, emotional dependence and exposure to harm is still emerging, according to UNICEF. UNICEF explained this evidence was limited in scope and that the adoption of AI was quickening the pace. This is possibly one

of the key facts. There are more technologies being scaled up than there is evidence of consequences.

The agenda for change in India is progressing: India must not wait for the AI shadow to tag its children as a permanent reality of their lives to contemplate its meaning. There are four steps that are critical:

1. Literacy in school beyond just prompting and fact-checking, empowering children to comprehend the functioning of systems and their ability to produce outputs and make predictions.
2. Support materials and advice for parents to help them navigate the AI environments their children use.
3. Regular and clear requirements for businesses to render the processing of children's data understandable, appropriate and traceable.
4. Restrictions on retention and inference that childhood data is not an implicit credential for a lifetime.

Most importantly, the information that is gathered during childhood should not be a secret credential for a lifetime. AI's promise is that it will be able to better understand learners. What risks do you face is that it might start to shape them. Gen Alpha might be the first generation to rise up with an AI shadow. The biggest danger is that AI will know too much, too soon and that it will confuse a moment in childhood for a lifetime map. Prior generations thought it was a given they would be able to become a person who their youths couldn't imagine. Gen Alpha deserves the same freedom.

The writer is Professor, Department of Commerce, CHRIST University

The Tribune

ESTABLISHED IN 1881

Himalayan tragedy

Nepal disaster is a wake-up call for the region

THE havoc wreaked by flashfloods in Nepal has exposed escalating climate risks in the Himalayan region and serious weaknesses in disaster preparedness. The death toll, including local residents and foreigners, is rising sharply; critical infrastructure has been ravaged in several districts. The catastrophe is a stark warning for South Asia and beyond. Preliminary assessments point to an ice-rock avalanche that blocked the Lhende tributary of the Bhotekoshi river, triggering a debris-laden flood that swept rapidly downstream. Whether a glacial lake outburst, landslide or avalanche was the precise trigger, the key lesson is clear: Nepal’s mountains are becoming increasingly dangerous.

Nepal is home to thousands of glaciers and glacial lakes, many of which are considered potentially hazardous. Scientists warn that rising temperatures are accelerating glacial retreat, altering snowfall and rainfall patterns and destabilising slopes. Climate change may not independently cause every Himalayan disaster, but it can create conditions in which natural hazards become more frequent and destructive. The latest flashfloods should therefore be viewed as part of a broader and increasingly urgent regional trend. The most immediate priority must be to strengthen early-warning systems. An alert received hours or even minutes before such a calamity strikes can mean the difference between life and death.

Cross-border cooperation is equally essential. Since rivers do not respect political boundaries, Nepal and China must ensure that information about landslides, glacial lakes, avalanches and unusual river behaviour is shared quickly and automatically. This should be the norm for all riparian states in the neighbourhood. India, which witnessed the cataclysmic Kedarnath tragedy in 2013, cannot afford to be complacent. Greater stress on technology, climate-resilient infrastructure and community involvement can significantly improve emergency response. This, in turn, can reduce the scale of destruction and minimise casualties, as demonstrated time and again by Japan.

Beyond H1N1

The bigger threat is antibiotic misuse

THE country’s H1N1 surge should prompt neither panic nor complacency. The Indian Medical Association has warned against self-medication with antibiotics and antivirals, while the Indian Council of Medical Research says there is no new H1N1 strain and the rise reflects seasonal influenza. The reassurance is welcome. But the episode exposes a weakness in our public health culture: treating every fever with a pill. Antibiotics do not work against influenza, a viral infection. Yet antibiotics are often sought at the first sign of fever, cough or body ache. Such indiscriminate use is not just harmless but it also contributes to antimicrobial resistance, reducing the effectiveness of medicines against bacterial infections. Antibiotics may be necessary when the flu is complicated by a secondary bacterial infection, but that decision belongs to a qualified doctor, not a pharmacy counter or Internet search.

Self-medication with antivirals is equally unwise. The answer to irrational antibiotic use cannot be indiscriminate use of another class of drugs. Timely diagnosis, appropriate treatment and better public health communication are needed. With H1N1 symptoms overlapping those of other respiratory infections, patients should not assume the cause or self-medicate. The surge also exposes India’s flu vaccination gap. The vaccination should become a more visible part of preventive healthcare, particularly for older people, pregnant women, healthcare workers and those with chronic conditions. The National Centre for Disease Control maintains seasonal flu surveillance and vaccine guidance, but recommendations matter only when people can access and act on them.

The response to the current virus must become smarter. Masking in crowded indoor spaces, respiratory hygiene, staying home when ill and seeking medical advice early can limit transmission. Hospitals and surveillance systems must remain prepared. The flu wave will pass. Antibiotic resistance will not.

ON THIS DAY...100 YEARS AGO

The Tribune.

LAHORE, SATURDAY, AUGUST 28, 1926

Debate on the Press Bill

THE debate that took place in the Legislative Assembly on Wednesday over Sir Alexander Muddiman’s motion that the new Press Bill be taken into consideration had several interesting features. As might have been expected, the motion was strongly opposed by some of the members, notably Dr Hari Singh Gour and Lala Lajpat Rai. The former held that the Bill was dangerous to the liberty of the Press and the public, that it was liable to abuse by the local authority, and that the government was taking undue advantage of the present passing phase of communal tension and of the attenuated membership of the House to re-enact one of the most obnoxious provisions of the Press Act of 1910, which the last Assembly had repealed. Rai, whose presence in the House on this occasion was rightly welcomed by his colleagues, described the Bill as a serious encroachment on the liberty of the Press. He was fully prepared, he said, to cooperate in finding a suitable remedy for the evil complained of by the Home Member, but said that the present Bill was insidious, and appealed to the government not to hit below the belt. He did not know of a single case, he added, where the Legislature had sanctioned measures to strengthen the hands of the government in which those measures had not been abused and had not been kept longer on the Statute Book than was needed.

Skilling alone won’t solve the job problem

The economy needs to create far more productive work, backed by a robust social security system



AJIT RANADE
SENIOR FELLOW, PUNE
INTERNATIONAL CENTRE

INDIA’s employment challenge contains a troubling paradox. Millions of young people are looking for work, while employers simultaneously complain that they cannot find workers with the skills they need. There is both a shortage of jobs and a shortage of suitably skilled people.

This diagnosis is not new. The International Labour Organisation (ILO)-Institute for Human Development’s India Employment Report 2024 and Azim Premji University’s State of Working India 2026 have documented its different dimensions. What makes NITI Aayog’s new report, Reimagining Skilling for Viksit Bharat@2047, significant is that the diagnosis now comes from within the government’s policy establishment.

The report is unusually candid about higher education. Curricula in many institutions are outdated, teaching remains excessively theoretical, practical exposure is inadequate and links with industry are weak. It cites the Economic Survey to note that only 8.25 per cent of graduates work in roles aligned with their qualifications. More than two crore students are enrolled in BA, BSc and BCom programmes, many of which have weak links to identifiable occupations.

India’s impressive expansion of higher education has not had commensurate progress in the quality and relevance of courses. A student moves from school to college, acquires a degree and then discovers that the credential does not provide access to the work that was expected.

The consequences show up in educated unemployment. The ILO-IHD report found that unemployment among young graduates was 29.1 per cent, against 3.4 per cent among those unable to read or write. Azim Premji University’s report finds



DOUBLE WHAMMY : There is both a shortage of jobs and a shortage of suitably skilled people. REUTERS

unemployment close to 40 per cent among graduates below 25, and about 20 per cent among graduates aged 25-29. Between 2004-05 and 2023, around 50 lakh graduates were added annually, but only about 28 lakh found employment.

This does not mean India has too much education. Education continues to yield substantial economic and social returns. It means that education, skills and the structure of employment are badly out of alignment.

There is an even less visible part of the problem. Conventional unemployment statistics capture those looking for or available for work. They miss many young people who have disengaged altogether. NITI Aayog estimates roughly nine crore youth as not in employment, education or training — the category known as ‘NEET’. A large majority are engaged in domestic duties. The gender dimension is stark: the ILO-IHD report found that in 2022, young women accounted for around 95 per cent of India’s ‘NEET’ population.

Thus India’s employment problem has at least three dimensions: a mismatch of skills, an inadequate supply of productive work, and millions of young people — especially women — who never make a successful transition into the labour market.

The skill mismatch is perhaps the most immediately repairable. Universities, colleges, polytechnics and industrial training institutes (ITIs) need

A falling headline unemployment rate does not necessarily mean that the quality of employment has improved.

much closer links with industry. Internships and apprenticeships should become integral to many courses rather than peripheral additions. Employers should participate not merely at the recruitment stage but in designing curricula, providing laboratories, offering live projects and bringing practitioners into classrooms.

Curriculum reform must also become much faster. Artificial intelligence is already changing work in software, finance, design, media, customer service and engineering. A syllabus which takes several years to revise can become obsolete even before a student graduates. Institutions therefore need substantially greater academic and adminis-

trative autonomy and less inertia. NITI Aayog itself calls for greater autonomy over course mix, faculty and procurement in technical and vocational institutions.

This also requires resisting excessive uniformity. India does not have one labour market. Skills needed around automobile clusters in Pune and Chennai differ from those needed in tourism, textiles, electronics or agro-processing. National frameworks can ensure standards and portability, but universities, states and even districts need room to respond to local economic conditions. A one-size-fits-all approach is especially unsuitable for higher education.

Yet skilling addresses only the supply side. The economy must also generate productive work.

Recent employment growth needs to be interpreted carefully. The ILO-IHD report notes that nearly two-thirds of incremental employment after 2019 was self-employment, with unpaid women family workers prominent, while the long movement of labour out of agriculture went into reverse. A falling headline unemployment rate therefore does not necessarily mean that the quality of employment has improved.

Nor should India expect every young person, or even a majority, to obtain a conventional permanent salaried job. Periodic Labour Force Survey (PLFS) data shows that only about 30 per cent of working youth presently have regular wage or salaried employment. The future will

contain much more self-employment, freelancing, platform work, short contracts and multiple sources of income.

The relevant distinction is not simply between a job and no job. It is between productive work and precarious work. There may be plenty of work without enough conventional jobs. Our social security architecture must adjust accordingly. Health and accident insurance, retirement savings and other protections should increasingly attach to workers rather than to one employer, and be portable across firms and platforms. Platform and gig work today unfortunately remains essentially an extension of informal employment with very little social security.

The vacancies within the government are also part of this discussion. Official data showed 9.64 lakh sanctioned civilian Central government posts vacant as of March 2022. Recruitment has accelerated subsequently, but no equally recent consolidated vacancy stock has been published. These are not make-work jobs. Vacant posts of teachers, nurses, engineers, police personnel and administrators also mean weaker public services.

Fiscal pressure undoubtedly makes recruitment harder. Large interest payment burden, subsidies, pensions and other committed expenditure further reduce fiscal room. Pending recruitment of teachers, healthcare workers and other public personnel seems to always lose out to building of physical infrastructure.

It is important to note that building skills is not the only way out of India’s employment problem. We need three things simultaneously: an education system producing relevant and adaptable capabilities; an economy creating far more productive work; and a social security system suited to a world with a mix of flexible workers and permanent salaried employees.

The demographic window will not remain open indefinitely. Success should not be measured merely by a lower unemployment rate. It must mean fewer young people trapped outside education and work, fewer graduates waiting indefinitely for scarce jobs, and expansion of work, flexible or salaried, covered with appropriate social security.

THOUGHT FOR THE DAY

Jobs are essentially Task One for the economy. — Raghuram Rajan

Rethinking *shagun* in the digital age

OPINDER SINGH LAMBA

SOME invitations are more than messages; they awaken memories, rekindle associations and reaffirm bonds that time has nurtured. A few days ago, I received a WhatsApp invitation to the wedding reception of a close friend’s daughter. Having known the family for many years, I was looking forward to being there — meeting old friends, sharing their happiness and blessing the young couple.

Today, wedding invitations arrive in many forms. WhatsApp messages and couriered cards are readily accepted, yet sending *shagun* digitally can still seem like a step too far.

In my case, a domestic exigency arose at the last moment, upending my plans. I could only convey my apologies and good wishes from afar.

When circumstances prevent physical presence, why hesitate to send *shagun* digitally? The idea is not to replace a cherished custom, but to find a graceful way of keeping its sentiment alive when personal participation becomes difficult.

Personally handing over the *shagun* envelope has long been part of the warmth and etiquette of the occasion. It conveys blessings and affection. Yet advancing age, distance or unforeseen circumstances can make attendance difficult.

Sometimes, another opportunity to meet the family does not arise. Sending *shagun* through the digital route need not be a mere monetary transaction. It can carry a message congratulating the parents, blessing the newlyweds and expressing regret for the absence. The meeting can follow later, perhaps over tea.

Ultimately, this is not about changing tradition but allowing it to accommodate contemporary realities. The ways we invite and communicate have changed, while the emotions behind them — respect, affection, goodwill and blessings — remain intact.

The envelope can remain a cherished symbol of *shagun*; there is no need to discard it. But when we cannot present it in person, a digital gesture — accompanied by heartfelt words — should not be regarded as a departure from tradition.

After all, the envelope may be conventional, but the feelings it carries are far more precious than the cash inside it. They come from the heart. And when circumstances keep us away, a heartfelt gesture can bridge the distance, quietly saying what our presence would have said — that we may have missed the celebration, but we did not miss the opportunity to share the joy.

The writer worked in the Information & PR Dept, Punjab

LETTERS TO THE EDITOR

Munir in complete command

Refer to ‘Munir holds all the aces in Pakistan’; Field Marshal Asim Munir has legally consolidated unprecedented, unified control over Pakistan’s military apparatus through the Defence Forces of Pakistan Act, 2026. PM Sharif’s civilian government remains formally in office. Munir has flown to Tehran with a mission from US President Trump to try and coax Tehran back to the negotiating table. Historically, when a Pakistani military regime faces an existential internal crisis, its default survival mechanism is to externalise domestic anger. India must recalibrate its security doctrine to account for a nuclear-armed neighbour run by a commander answerable to none.

SS PAUL, NADIA (WB)

US deal with Pak transactional

With reference to ‘Munir holds all the aces in Pakistan’, the General’s deals with the US in cryptocurrency and rare earth minerals in which Trump’s friends and relatives have a stake made him Trump’s favourite Field Marshal. Asim Munir had to assure Trump that he was in total control of Pakistan and the US business deals would be safe under his leadership. Trump’s foreign policy is based on transactions rather than on ideology or principles. So the question is that apart from deals in crypto currency and minerals, how else is Munir useful to Trump?

ASHOK BAHL, KANGRA

Gradual growth in Rahul’s graph

Apropos of ‘Is Rahul less of a Pappu now’; there is little doubt that the Gandhi scion has undergone a remarkable transformation and emerged as a formidable Leader of Opposition. This transformation has not been sudden. It reflects a gradual process of political maturity and patience. Whether Rahul Gandhi can translate this transformation into sustained political leadership will ultimately be judged not by labels or slogans, but by his performance, vision and ability to provide a meaningful alternative.

VK ANAND, CHANDIGARH

CJI must take remedial measures

Apropos of ‘Favouring rich litigants : SC judge asks CJI to change Raj HC Acting CJ’; a judge of the apex court asking the CJI to replace the Chief Justice of a High Court is unprecedented. The issue must be dealt with on priority to prevent a travesty of justice. If three letters have been written to the CJI over a short span of 16 days, it means that the matter deserves immediate attention. It would be in the best interests of the public that necessary steps are taken urgently to keep the public faith in the judiciary intact.

VIJAYA SHARMA, BY MAIL

India, Nepal should act in unison

Nepal and India must act together to protect fragile mountain ecosystems and safeguard millions living downstream. We need real-time satellite, seismic and glacier monitoring, supported by a seamless cross-border early-warning system that reaches vulnerable communities in time. Scientific institutions should share data swiftly, while governments must strictly regulate construction in high-risk valleys and floodplains. Bridges, hydel power plants and other critical infrastructure must be strengthened to withstand climate-related risks. The Himalayas recognise no political borders; neither do floods. Protecting this vital ecosystem means safeguarding our water, livelihoods and future.

K KUMAR, PANCHKULA

Elders need conversations

Caring for elders goes far beyond giving them medicines twice a day. What they truly need is conversation, attention and emotional support. In earlier times, families would sit together, share meals, and talk, creating a sense of belonging. Today, with everyone in separate rooms and busy schedules, elders are left alone. Even 20 minutes of genuine interaction each day can bring them immense joy. Whether in our homes or in society, the old deserve connection, respect, and care.

TARANJIT KAUR, SHAHPUR

NEPAL FLOODS

Why rivers devour infra



SANDEEP JOSHI
PHD, ENVIRONMENTAL SCIENCE

LOOK at the Bhotekoshi riverbed in northern Rasuwa. On the morning of August 26, a sudden 10-metre wall of water swept through Timure and Syabrubesi, destroying many settlements, tearing apart the customs infrastructure, ripping down police posts, damaging hydropower facilities, and snapping newly completed bridges along our primary trade route. Official reports will cite an 'unprecedented hydrological surge/event'. But when an event hits the same landscape more than once in a decade, calling it a 'surprise' is poor planning and shortsightedness.

We are building a country for a climate that no longer exists. All strategic documents in Kathmandu — whether a national adaptation plan, a road expansion blueprint or a donor-funded rural livelihood initiative — show a quiet, persistent reliance on central tendencies. Planners build models around mean annual rainfall, baseline temperature increases and average river discharges. Means make complex landscape systems look neat on paper. They let us draw predictable trendlines into five-year project budgets.

Nepal's geography, however, does not care about averages. A slope in Rasuwa does not slump, nor does a bridge abutment fail because the Trishuli corridor received its typical seasonal rainfall. It collapses because a high-altitude outburst upstream dumps months of water into a narrow gorge within minutes. Climate change, particularly in the Himalayas, is not merely shifting baseline medians upward by fractions of a degree. Its real impact is extreme variance stretching the distance between the expected mean and the destructive tail event.

Our failure to account for this gap is a failure of basic statistics. Standard engineering in Nepal designs structures around averages: the 30-year mean flood level or the average monsoon runoff. But in volatile landscape systems, the mean tells almost nothing useful. The real threat lives in the standard deviation: the measure of how wildly extreme events deviate from that comfortable average.



STATISTICS : When a glacial lake outburst hits, the actual discharge overwhelms structures engineered for historical medians. P11

When you design a concrete bridge or a riverside highway for the mean, you are effectively designing it for a calm day that occurs 90% of the time. But infrastructure does not fail on calm days. It fails when a statistical outlier, a three-standard-deviation event, strikes the watershed. A structure built to withstand the mean is, by definition, built to wash away the moment variance rears its head.

This statistical blind spot ruins public budgets. The aftermath permeates the daily lives of thousands, crippling them so much that bouncing back is nearly impossible. When an intense, high-variance storm or glacial lake outburst hits, the actual discharge overwhelms structures engineered for historical medians. Drains overflow, culverts snap and retaining walls slide into the riverbed. Rebuilding the same bridge in the same spot using the same mean-based calculations every autumn invites a recurring loss of lives and fiscal drain.

Breaking this cycle requires three shifts in how we plan public investments across the country. First, the Ministry of Physical Infrastructure and Transport must ban average-based calculations for critical landscapes such as mountain corridors. Public works must be engineered around high standard deviations.

Evaluations must ask how well an investment holds up under extreme shocks rather than reporting outdated average returns.

Approval should require stress-testing against 100-year variance models, accounting for sudden high-volume deluges rather than historical rainfall medians.

Second, international development agencies and regional planners must overhaul project evaluation metrics. A programme that claims to have stabilised a riverbank or boosted local economic activity by 15% based on average seasonal data has accomplished nothing if a single high-sigma flood event destroys the entire valley six months later. Evaluations must measure resilience against variance, asking how well an investment holds up under extreme shocks rather than reporting basic, outdated static average returns.

Finally, the National Disaster Risk Reduction and Management Authority needs to move resources away from post-disaster cleanup into forecast-triggered action. Waiting for a landslide to choke a river before mobilising emergency funds is an expensive strategy. Automated, forecast-based budget mobilisations and warnings must trigger the moment high-variance weather patterns or upstream outburst indicators appear, allowing communities to secure assets before the wave arrives.

There is no doubt Nepal's terrain presents natural challenges, but our current systems fail because our planners insist on designing for a calm middle ground that no longer exists and we have seen multiple devastating examples. A bridge or an adaptation policy that performs beautifully during 99 average days is useless if it collapses on the one day the river shows us its true standard deviation. So, planning must move from mean to standard deviation-based thinking, staying ready for unprecedented and outlier events, which in reality are preceded.

Credit: The Kathmandu Post

Danger of living downstream



SUSHIM THAPALIYA
PHOTOGRAPHER AND WRITER

NEPAL sits downstream from the Tibetan Plateau in China, and the country has a blind spot when it comes to disaster preparedness. A disaster upstream becomes a disaster downstream, yet much of Nepal's flood preparedness begins once the two Bhothe Koshis, Karnali or the Arun, enter Nepal.

The Tibetan Plateau feeds some of Asia's major rivers, and its glaciers, glacial lakes, permafrost and terrain are changing as the climate warms. For Nepal, what happens on the other side of the Himalayas can come down as a flood that kills people and destroys infrastructure. Both Bhothe Koshis start in Tibet, one crosses into Nepal at Kodari and the other into Rasuwa. In both cases, the steep rivers flow through deep gorges and past settlements, hydropower projects and roads that form the two main Nepal-China trade routes.

The problem is not just that Nepal is vulnerable to floods. It is that sometimes, the hazards that become floods in Nepal begin somewhere else, as they did last year and again this year on the same river. Preparing for them requires information, research and communication that can cross the same border the river does.

The Bhotekoshi floods have demonstrated this vulnerability in two consecutive monsoons. On July 8, 2025, a sudden flood swept through the Bhotekoshi in Rasuwa. At least 18 people were killed and the Friendship Bridge at Rasuwa Gadi was destroyed, hydropower projects, transmission lines, electricity substations and the road between Nepal and China were damaged.

Just as last year, Nepal's Department of Hydrology and Meteorology said this week that there had not been heavy rainfall on the Nepali side of the border. The Flood Forecasting Division only became aware of the flood when the water had reached Betrawati. Nepal lacks a mechanism for receiving rainfall and flood-water data from the Chinese side. But once the floods last year and this week entered Nepal, authorities quickly sent out SMS alerts to people downstream in the Trisuli valley. But



VULNERABLE : A disaster upstream spells danger further along the river. REUTERS

such an alert is not the same thing as an early-warning system. The 2025 floods were triggered by a glacial lake outburst at the headwaters of the Lhende River near the Nepal-China border. Satellite analysis identified the sudden drainage of a supraglacial lake in Tibet.

That finding should have changed how Nepal thought about the Bhothe Kosi. A destructive flood could originate beyond Nepal's monitoring systems, without the rainfall patterns Nepali forecasters would normally be watching for and reach communities downstream with little time to react.

For a transboundary river, cross-border communication is not a diplomatic convenience; it should be a part of disaster preparedness. But Nepal is not fully in the dark about what happens upstream. On August 12, a landslide near Nyalam in China blocked the flow on the East Bhothe Kosi. When the river level fell ominously, Nepal authorities warned downstream residents, while security personnel monitored the river for a sudden surge. There had been no warning about the river blockage.

A 2024 study of communities in the Bhotekoshi/Sunkoshi and Trisuli basins found a high level of awareness of GLOF (Glacial Lake Outburst Flood) risk along the Bhotekoshi and recommended stronger early-warn-

For a transboundary river, cross-border communication should be a part of disaster preparedness.

ing systems, cross-border cooperation, public awareness and resilient infrastructure.

Nepal has demonstrated its ability to respond when disaster strikes. On Wednesday, the Nepal Army, Armed Police Force, and the Nepal Police were immediately mobilised. Warnings were issued downstream. But rescue is reactive. By the time helicopters are in the air, bridges may already have been washed away, roads blocked and communities stranded. Preparedness asks what could have been done before that point.

For the Bhotekoshi, that means reliable data-sharing with China, monitoring glacial lakes and unstable terrain, incorporating satellite and scientific research into government risk assessments, and establishing clear protocols for district authorities, hydropower operators, and communities when an upstream hazard is detected. It also means reconsidering how Nepal rebuilds after disasters. The Betrawati-Rasuwa Gadi corridor, damaged by last year's floods, has again suffered extensive damage. Rebuilding infrastructure without incorporating new hazard information risks rebuilding the same vulnerability. Nepal cannot predict every flood or prevent glaciers from retreating or every landslide from occurring. But it can build a system in which an upstream disturbance triggers monitoring, information-sharing, risk assessment and preparedness downstream.

The 2025 flood showed what happens when information cannot cross the border quickly enough. The August 26 flood has shown, again, how quickly a hazard originating beyond Nepal can become a disaster. The question is whether Nepal will know soon enough to act the next time something changes upstream.

Credit: Nepali Times

For full article, go to

www.tribuneindia.com/opinion

Hindu Kush glaciers losing ice at double the rate

GLACIERS across the Hindu Kush Himalaya (HKH) are melting at an accelerating rate, with ice loss rates doubling since 2000, according to two new reports by the International Centre for Integrated Mountain Development (ICIMOD).

The reports — *Changing Dynamics of Glaciers in the Hindu Kush Himalaya Region from 1990 to 2020* and *HKH Glacier Outlook 2026: Insights from 50 Years of Himalayan Glacier Monitoring* — provide evidence of glacier change in the region. They reveal a loss of up to 27 metres of ice thickness since 1975, sounding an alarm for the nearly two billion people downstream who depend on meltwater from the 'Water Towers of Asia'.

The HKH holds the largest volume of ice outside the poles, with an inventory of over 63,700 glaciers covering nearly 55,782 sq km. These glaciers are the source of 10 major Asian river systems, supporting the food,

water, energy and livelihood security of billions. However, around 78% of this glacier area, located between 4,500 and 6,000 metres above sea level, is highly exposed to elevation-dependent warming.

"This isn't a distant problem; it's a crisis unfolding in real-time. The fact that ice loss rates have doubled this century should shock us all into action," said Pema Gyamtsho, Director General of ICIMOD.

The analysis reveals that between 1990 and 2020, HKH glaciers lost about 12% of their area and 9% of estimated ice reserves. Sudan Bikash Maharjan, Remote Sensing Analyst at ICIMOD and lead author of the glacier dynamics report, said the immediate threat comes from the region's smallest glaciers. "Between 1990 and 2020, HKH glaciers lost about 12% of their total area, but the losses are most acute for the region's smallest glaciers — those below 0.5 km² — which are shrinking more rapidly than others," he said. "This poses immediate risks of localised water

The largest area losses are concentrated in the Indus, Ganga and Brahmaputra basins, where over 74% of the region's glaciers are found.

shortages for high mountain communities and intensifies hazards like glacial lake outburst floods. The danger is magnified because three-quarters of the region's glaciers fall into this vulnerable size class."

The *HKH Glacier Outlook 2026* synthesises data from 38 monitored glaciers, revealing that widespread wastage has doubled post 2000, signalling that parts of the Himalayan

cryosphere may be nearing critical tipping points towards irreversible retreat.

Yet, the reports highlight a critical data gap: of those 38, only seven meet the global benchmark monitoring standards of the World Glacier Monitoring Service. Glacierised regions, including the Karakoram, Sikkim, Zaskar, and Bhutan remain largely unmonitored.

"We are trying to navigate a rapidly changing future with an incomplete map," said Mohd Farooq Azam, a cryosphere specialist at ICIMOD and one of the report's authors. "Large parts of the Himalaya remain blind spots. Without expanding our monitoring networks and standardising methodologies, accelerated changes in water flows and cryosphere risks could remain undetected until the impacts are severe.

Sustained monitoring of representative glaciers like Mera and Rikha Samba in Nepal, and Chhota Shigri in India, is critical, they are our early warning indicators for

the entire mountain system."

The reports highlight that glacier losses are spatially skewed, with the highest percentage of area loss in the eastern Hengduan Shan mountains, where some areas lost up to 33% of their glacier area in just three decades. However, the largest area losses are concentrated in the Indus, Ganga and Brahmaputra basins, where over 74% of the region's glaciers are found, underlining their vulnerability.

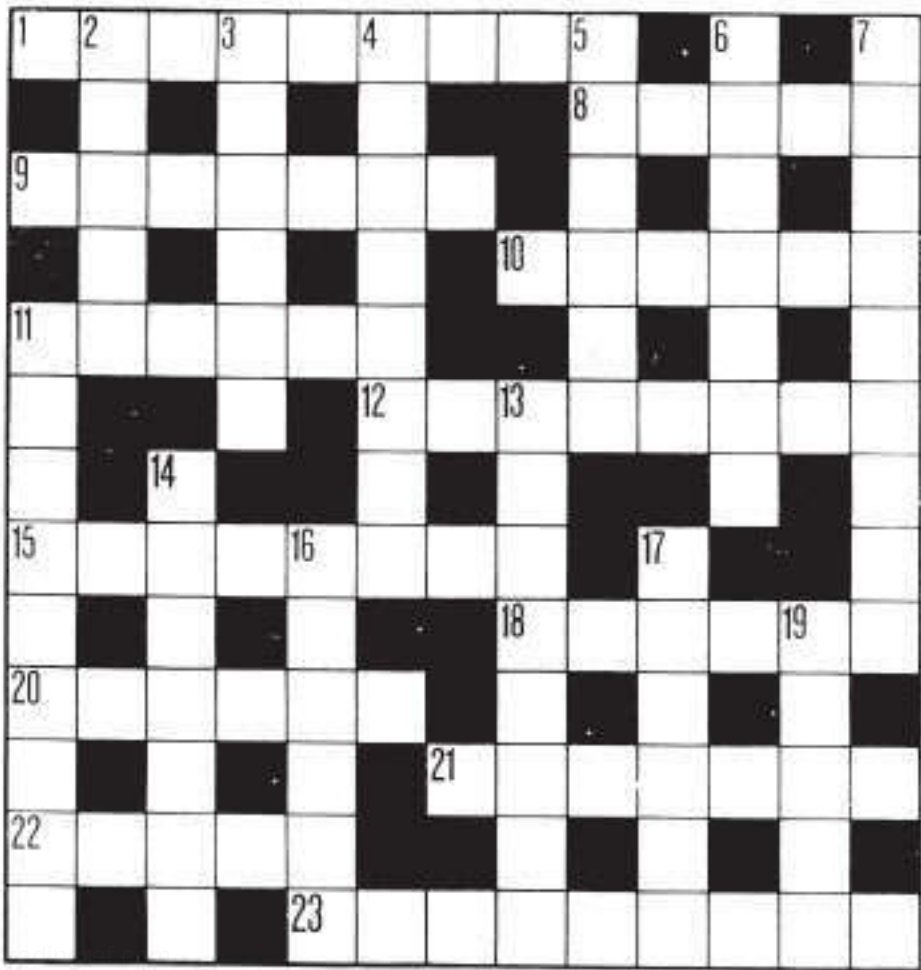
The glaciers above 10 km² hold 40% of the region's natural water reserves. The heavily glaciated Karakoram range, home to 18 of the 25 largest glaciers, remains vulnerable to water, food, and disaster risks with ramifications for the entire region. The authors call for a scale-up in glacier monitoring, standardisation of methodologies, and investment in climate-resilient adaptation planning to mitigate the impacts of a changing cryosphere.

Credit: <https://www.icimod.org>

For full article, go to

www.tribuneindia.com/opinion

QUICK CROSSWORD



ACROSS

- 1 Lacking dexterity (3-6)
- 8 Bored listlessness (5)
- 9 Venal (7)
- 10 In abundance (6)
- 11 Unfasten and remove (6)
- 12 Unquestioning (8)
- 15 Eternal (8)
- 18 Prize of victory (6)
- 20 Enthusiastically cordial (6)
- 21 To excuse (7)
- 22 Utterly weary (3,2)
- 23 Assess the situation (4,5)

Yesterday's Solution

Across: 1 Saffron, 4 Sloth, 7 Used, 8 Manually, 10 Behind bars, 12 Dinghy, 13 Adduce, 15 Brush aside, 18 Laboured, 19 Peep, 20 Yield, 21 Dynasty.

Down: 1 Squib, 2 Free hand, 3 Nearby, 4 Square deal, 5 Oily, 6 Haywire, 9 In the round, 11 Business, 12 Devilry, 14 Ascend, 16 Empty, 17 Able.

DOWN

- 2 Higher than (5)
- 3 Stiff in manner (6)
- 4 A blue gemstone (8)
- 5 A subordinate particular (6)
- 6 Having up-to-date knowledge (2,5)
- 7 Biography (4,5)
- 11 At extremely low price (4,5)
- 13 Good-natured (8)
- 14 Not yet developed (7)
- 16 Looked for (6)
- 17 Widespread destruction (6)
- 19 Mayhem (5)

SU DO KU



V. HARD
epaper.tribuneindia.com

FORECAST

SUNSET:	FRIDAY	18:50 HRS
SUNRISE:	SATURDAY	05:58 HRS
CITY	MAX	MIN
Chandigarh	36	25
New Delhi	35	26
Amritsar	35	29
Bathinda	40	27
Jalandhar	35	29
Ludhiana	37	29
Bhiwani	39	26
Hisar	39	29
Sirsa	39	29
Dharamsala	30	20
Manali	27	18
Shimla	24	17
Srinagar	34	19
Jammu	36	26
Kargil	31	14
Leh	27	10
Dehradun	31	23
Mussoorie	24	19

TEMPERATURE IN °C

The Statesman
*Incorporating and directly descended from
the Friends of India -founded 1818*

Setting a direction

The crisis at the top of the Tata Group is about far more than finding a successor to N Chandrasekaran. It exposes a deeper question confronting one of India's most consequential business institutions: who ultimately sets the direction of a conglomerate whose ownership, management and public identity operate through different centres of authority?

For years, the Tata name has rested on an unusual combination of professional management, philanthropic ownership and public trust. That model has enormous strengths, but it also depends on alignment between Tata Trusts, which controls Tata Sons, and the executives running the group's businesses. When that alignment weakens, the consequences extend well beyond the boardroom.

The immediate challenge is therefore institutional. A new chairman cannot succeed merely by being an accomplished corporate executive. The person will have to rebuild confidence between Tata Trusts and Tata Sons while convincing investors, employees, regulators and the government that strategic decisions are being taken coherently.

The history of the group shows how difficult that balance can be when shareholder authority and managerial responsibility pull in different directions. The problem is made more urgent by the scale of the group's current ambitions. Tata has invested heavily in semiconductors, electric-vehicle batteries, aviation and other businesses intended to shape its next generation of growth. Such investments can be justified as strategic bets on India's changing economy. But strategic ambition does not eliminate the need for capital discipline.

Mature businesses have historically provided the financial strength that allowed the group to pursue long-term projects. Yet that cushion cannot be assumed to remain indefinitely. TCS, the group's most important generator of cash, is itself confronting a technological transformation brought about by artificial intelligence. The next chairman will consequently inherit a portfolio in which yesterday's cash engines must support tomorrow's uncertain businesses.

There is also a reputational dimension. Tata's listed companies are separately managed, but their fortunes are inevitably connected to the credibility of the group at its centre. Prolonged uncertainty over succession, strategy and governance can eventually become a problem for shareholders who have no direct voice in the affairs of Tata Sons.

The answer cannot be to return mechanically to an earlier era when ownership and management were effectively embodied in the same leadership. The modern Tata Group is too large and complex for that. What it needs instead is a clearer institutional settlement: defined authority, credible communication and an agreed strategic framework within which professional managers can operate.

The next chairman, therefore, should not be judged simply by whether she or he can keep Tata growing. The more important question is whether that person can make the group's governance fit for the scale and complexity it has now acquired. Chandrasekaran's departure may prove less a change of leadership than a test of whether the Tata model itself can adapt without losing the qualities that made it distinctive.

Economic D-Day

America's latest attempt to break Iran may expose the limits of economic power rather than demonstrate its reach. Washington has moved from bombs to bargaining and now to financial strangulation. The Trump administration's new campaign threatens countries and companies that continue doing business with Tehran, while targeting the shipping, aviation, technology, gold and digital networks that help Iran evade sanctions. Yet the most consequential weapon ~ secondary sanctions against major foreign financial institutions ~ has so far remained largely a threat. That distinction matters.

Sanctions are powerful when the threatened country has nowhere else to go. Iran has spent decades learning precisely how to survive economic isolation. Its networks of intermediaries, shadow shipping, informal finance and sanctions-busting companies have not disappeared. The country is badly weakened, but weakness is not the same as surrender. The bigger problem for Washington is China.

Beijing remains the principal buyer of Iranian oil, and the new American measures conspicuously stopped short of imposing penalties on major Chinese financial institutions. Washington can threaten Chinese companies; shutting them out of the American financial system would carry consequences far beyond Iran. It would turn sanctions enforcement into another front in the strategic rivalry between the world's two largest economies.

This is why the language of an "economic D-Day" is misleading. D-Day had a defined military objective: establish a foothold from which Nazi Germany could ultimately be defeated. Economic pressure has no equivalent moment of victory. A sanctions campaign can reduce revenues, weaken the currency, restrict imports and make the Iranian government increasingly costly to sustain.

But it cannot, by itself, determine how a regime responds to those pressures. Indeed, history suggests that authoritarian governments often distribute economic pain downward while tightening political control. Iran's rulers have powerful security institutions and years of experience presenting foreign pressure as an assault on national sovereignty. Severe economic hardship may therefore weaken the state without producing the political capitulation Washington seeks.

That does not make the American strategy futile. A poorer, more isolated Iran has fewer resources with which to finance its military networks, sustain regional influence or pursue strategic ambitions. Containment can therefore be a legitimate objective. But containment is fundamentally different from regime change. The danger is that Washington may confuse the two. If Tehran retaliates against the pressure, the United States could find itself compelled to answer militarily. If sanctions are tightened enough to eliminate the remaining loopholes, America may have to confront China and other countries whose cooperation it needs. And if those countries resist, the economic war against Iran could become a much wider contest over the reach of American financial power.

The real test, therefore, is not whether sanctions hurt Iran. They plainly will. It is whether economic pain changes Tehran's strategic calculations. For now, there is little reason to assume that it will. America can make Iran poorer. Making it surrender is another matter.

Grain and the chaff

India's contemporary youth (Gen Z) remain largely unaware that the very political formations that engineered the devastation of an entire generation in the 1970s now form opportunistic alliances, seeking to lead another generation down a deceptive path. To a veteran who witnessed those days of the 1970s and barely survived that violent turmoil, the current rhetoric carries the unmistakable echoes of a dangerous rerun

In the contemporary Indian public sphere ~ spanning elite seminar circuits, opinion columns, prime-time television studios, and academic salons ~ few vocabularies have suffered as much distortion as Hinduism, secularism, revolution, and Naxalbari. These concepts are routinely stripped of their historical reality and recycled as rhetorical tokens by an entrenched intellectual ecosystem.

Regarding the first two concepts, little elaboration is necessary here. The systematic misinterpretation of India's spiritual and social heritage by self-serving classes throughout the ages has already been addressed with unmatched clarity by Swami Vivekananda.

In his concise thirty-nine-page tract, *In Defence of Hinduism* (Advaita Ashrama), available across Ramakrishna Mission centers, Vivekananda laid bare the hypocrisy of those who fail to comprehend the civilization's genuine spiritual and egalitarian core. Leaving those two terms aside, the historical focus here belongs on the latter pair: the organic reality of Naxalbari and the tragic myth of revolution that followed in its wake.

The peasant uprising that erupted in the Siliguri Terai region in May 1967 was neither a sudden ideological whim nor an urban theoretical experiment. It was the direct historical continuation of the militant agrarian struggles of the 1940s, most notably the Tebhaga Movement (1946-1950), where bargadars and adhiyars (sharecroppers) demanded their legitimate two-thirds share of the harvest and the dismantling of the oppressive jotedari system.

The leaders who built this movement on the ground ~ Kanu Sanyal, Jangal Santhal, Kadam Mallick, and Khudan Mallick ~ hailed from the lower and lower-middle strata of rural society. They lived among the Rajbanshi peasants, Santhal adivasis, and tea-garden labourers for decades, organizing village-level Krishak Samitis, establishing collective grain reserves, and building mass resistance.

In sharp contrast stood Charu Mazumdar, an ideologue from an aristocratic landowning family of Siliguri, who approached rural agitation not through patient mass organization, but through dogmatic pamphlets based on imported ideas. When the initial agrarian revolt broke out in May 1967, it was suppressed by the First United Front government of



West Bengal, a coalition in which the Communist Party of India (Marxist) (CPI-M) was a dominant constituent and Jyoti Basu held the crucial Home (Police) portfolio.

When frontline organizers like Kanu Sanyal and Souren Bose undertook a perilous, secret trek to China in late 1967 and 1970, they met directly with Mao Zedong, Premier Zhou Enlai, and Kang Sheng. The advice given by the Chinese leadership was unambiguous. Mao Zedong explicitly instructed them: "Whatever you learn in China, try to forget it. Go to your own country, try to understand the specific situation, and carry the revolution forward." In 1970, Zhou Enlai and Kang Sheng directly warned the CPI(ML) leadership against the infantile slogan "China's Chairman is our Chairman" and firmly condemned individual assassination squads (Khatam line) as adventurist terrorism that would detach the party from the working masses.

Charu Mazumdar disregarded these warnings, concealed the Chinese critiques from the party rank-and-file, and engineered a formal split with Kanu Sanyal and the Terai organizers. He shifted the movement away from rural peasant committees into a campaign of conspiratorial vanguard terror, taking it from the paddy fields of North Bengal into the alleyways of Kolkata.

What unfolded across urban West Bengal in the early 1970s was an exercise in nihilistic violence disguised as revolution, running directly counter to the civilizational ethos of India. Action squads targeted and desecrated statues, libraries, and portraits of the icons of the Bengal Renaissance ~ Ishwar Chandra Vidyasagar, Rabindranath Tagore, Swami Vivekananda, and Raja Ram Mohan Roy. The campaign targeted primary school teachers, university investigators, traffic constables, and small clerks. Educational institutions were brought to a standstill, and an entire generation of brilliant youth from institutions like Presidency College and Calcutta University was swept into the firestorm. A profound class hypocrisy governed this tragedy. While thousands of idealistic students from lower-middle-class families were incarcerated, tortured, or eliminated, the children of top echelon political leaders ~ both from the parliamentary Left (like Jyoti Basu) and the radical theorists ~ were carefully sheltered from the street warfare, pursuing secure careers and education abroad or in protected circles.

While ordinary cadres endured horrific prison sentences, brutal state reprisals, genuine physical hardships, and ideological

disillusionment, the surreal underground existence of gentleman ideologues during the same period was later documented by Santosh Rana in his Sahitya Akademi award-winning autobiography, *Rajnitir Ek Jibon* (Ananda Publishers). A brilliant research scholar in physics who abandoned a promising academic career at Calcutta University and Presidency College to organise landless labourers in Gopiballavpur, Rana's memoir stands as a moving testament to how genuine rural dedication was undercut by theoretical adventurism.

Ultimately, the first wave of urban insurgency was crushed by the state apparatus under the Congress administration of Siddhartha Shankar Ray, often in mutual, bloody street confrontations with cadres of the parliamentary Left. Subsequent iterations of Left-Wing Extremism in India's central forests, and the corresponding emergence of metropolitan activist ecosystems, bore no structural connection to the original peasant uprising of Naxalbari.

In fact, the very phrase "Urban Naxal" is an ideological oxymoron. The essence of the 1967 struggle was a rural, peasant-led protracted People's War designed to encircle the cities from the countryside. Locating the movement in metropolitan university seminars, television debates, and privileged social circles directly contradicts the foundational spatial and class tenets of the Naxalbari peasant movement.

Historically, the recognition of this urban front as a primary national security concern was formalized during the United Progressive Alliance (UPA) tenure. It was Prime Minister Dr. Manmohan Singh who prominently identified Left-Wing Extremism as the "single biggest internal security challenge" faced by modern India, while his Ministry of Home Affairs submitted detailed affidavits to the Supreme Court cataloguing how metropolitan front organizations provided logistical cover, propaganda, and legal defence for the underground insurgency.

The contrast between the real Naxalbari pioneers and contemporary ideologues is stark. Kanu Sanyal never abandoned his modest hut in Sebdella Jote (Naxalbari). He lived in absolute penury, remaining committed to local agrarian concerns until his death by suicide in March 2010.



**SINDHU NIL
BARMANN ROY**
The writer is Distinguished Professor, RKMVERI, Belur



Stop ignoring Nepal's hydropower reality

Nepal's hydropower potential is often touted as one of the highest per-capita power production in the world, boasting a theoretical potential of approximately 83,000 megawatts, of which around 43,000 are considered technically and economically feasible. Yet, with a total installed generation capacity of 4,200 megawatts and domestic demand hovering around 2,000 to 2,200 megawatts, the nation continues to struggle to exploit its potential.

In the last fiscal year, Nepal earned a record-high Rs 29.32 billion from exporting electricity to India and Bangladesh. However, the current production and export model is fundamentally unsustainable as it remains heavily reliant on selling volatile monsoon surplus while importing power during the dry season. To secure long-term economic resilience, Nepal must capitalise on the Indian energy market while it lasts,

forge proactive trilateral agreements to export power to Bangladesh, and accelerate domestic consumption. The window of opportunity in India will not remain open indefinitely. Although India's electricity demand is projected to reach 458.7 gigawatts by 2036, the country is rapidly diversifying its own energy sources.

Its solar capacity is projected to reach 211 gigawatts, with the nation targeting 100 gigawatts of nuclear power by 2047. Under these circumstances, India will increasingly assess Nepal's electricity based on strict parameters of price, reliability and availability. Kathmandu must acknowledge this reality.

To secure the Indian market, the state must immediately resume the stalled power purchase agreement (PPA) process, where projects representing roughly 16,500

megawatts currently languish. It is vital to negotiate long-term agreements of 5, 15 and 25 years. Furthermore, Nepal needs to invest heavily in transmission infrastructure as inadequate infrastructure currently wastes around 1,000 megawatts of generated electricity. Prioritising cross-border transmission networks, however, is not enough.

Since most of Nepal's hydropower plants are run-of-river, fast-tracking reservoir-based projects like Upper Arun, Dudhkoshi and Budhigandaki are essential steps to provide consistent, year-round electricity.

Relying on a single export market, however, exposes Nepal to geopolitical vulnerabilities. Past bilateral tensions have led to economic blockades, notably in 1969, 1988-89, and 2015-16. Power-hungry Bangladesh, currently crippled by severe gas and electricity shortages, represents

an ideal partner. Bangladesh's master plan seeks to import up to 9,000 megawatts of electricity from its neighbours.

Crucially, Nepali hydropower is highly competitive. The initial bilateral agreement to export 40 megawatts to Bangladesh was priced at Tk8.35 per unit, which is 78 percent cheaper than Bangladesh's costly imports from India. Kathmandu must proactively seek trilateral agreements with New Delhi and Dhaka to establish stable cross-border corridors.



GUHA SAILENDRA NATH — Our sincere homage on your 30th death anniversary. — Dr. Santanu (son), Dr. Samayita (grandchild), relatives and friends, B-16, Subodh Park, Kolkata-700070. Phone - 033 24103640.

Letters To The Editor | ✉ editor@thestatesman.com

Drug tests

Sir, Apropos "Wrong moment", published today, the caution urged is timely, particularly when drug testing is being considered after an aviation incident. A positive cannabis test, by itself, cannot establish that a pilot was impaired at the time of the incident. Cannabis can remain detectable long after its effects have passed, making the interpretation of such results difficult.

At the same time, airlines cannot afford ambiguity when passenger safety is involved. A clear pre-duty abstinence rule, combined with random testing, would provide a more practical safeguard. Investigators should

also examine cockpit recordings, flight data, medical evidence and the pilot's actions before drawing conclusions.

Regulatory action must be based on reliable evidence rather than a single test result. Aviation authorities should therefore strengthen both prevention and investigation without compromising fairness or due process.

Yours, etc., A. Myilsami,
Coimbatore, 25 August.

Govt schools

Sir, The Cockroach Janta Party (CJP) wrote to education ministers of all states

seeking detailed data on government school infrastructure, teacher vacancies and funding over the past five years, as part of its ongoing campaign highlighting deficiencies in public education.

The visuals from government schools circulating on social media showed children studying without basic facilities such as safe drinking water, functional toilets, proper classrooms and benches.

It has been 80 years since India gained Independence. No child in this country should be forced to study in such conditions. They are being treated worse than animals.

The recent campaign on the condition of government schools, highlights dilapidated

buildings and inadequate infrastructure and calls for increased public spending on education.

Governments must disclose the funds allocated to schools over the past five years and the amount actually spent during the period.

The states must provide estimates of the additional number of government schools required to ensure reasonable access to quality education. Every child deserves a safe classroom, clean drinking water, a functional washroom, a bench to sit on, and a teacher to teach them.

Yours, etc., Bhagwan Thadani,
Mumbai, 25 August.



The airport we never see

SHARMILA DAS SHARAN

We notice the queues, the delays and the long walks. But what does it take to make an airport work?

We arrive at an airport carrying our own little stories. We may be excited about where we are going, emotional about where we have been, rushing because we are late, or simply irritated because the security queue appears to have acquired a life of its own. We notice the traffic outside, the check-in counters, the immigration queue, the coffee shop, the departure board and inevitably, the distance to our gate.

We notice almost everything that affects us. What we rarely notice is the extraordinary choreography required to make all of this work.

An airport is, in many ways, a small city that cannot afford to stop.

Thousands of people arrive and leave. Aircraft land and take off. Baggage moves through systems we barely see. Food has to reach aircraft at precisely the right time. Toilets have to be cleaned, floors maintained, equipment serviced, security coordinated, information updated and gates prepared. There are engineers, cleaners, security personnel, ground handlers, airside teams, customer-service staff, technicians, drivers, catering crews, maintenance workers and countless others whose work becomes visible to us only when something goes wrong.

Perhaps that is the peculiar nature of a well-run airport. Its success is almost invisible. When everything works, we simply assume it should.

Consider something as unremarkable as a step-ladder.

An aircraft arrives at its parking position. Passengers are ready to disembark. The crew is ready. The gate is ready. The baggage operation is being prepared. Yet if the equipment needed to bridge that simple gap

between aircraft and ground is not where it should be, the entire sequence can be disrupted.

It sounds almost absurd. Surely a step-ladder cannot matter that much? But that is precisely the point. In a complex system, a seemingly insignificant object can become extraordinarily important at a particular moment.

One missing piece can delay an aircraft. That delay can affect the next departure. The next departure can affect another gate, another crew, another aircraft and eventually, hundreds of passengers who have absolutely no idea that the original problem began with something as ordinary as a piece of equipment not being in place.

We tend to think of importance in terms of size. Airplanes are important. Runways are important. Control towers are important. Step-ladders? Not so much.

But systems do not work according to our perception of importance. They work according to interdependence. That is what makes an airport fascinating.

It is not one machine. It is an enormous network of people, processes, technology, equipment and timing, each dependent on the other. The aircraft may be the most visible part of the operation, but it is only one element in a much larger choreography. And choreography is perhaps the right word.

A dancer arriving late can disrupt a performance. At an airport, hundreds of such movements are taking place simultaneously, except the dancers are aircraft, baggage carts, catering trucks, buses, engineers, security teams and people. And unlike a stage performance, the choreography changes constantly.

Weather changes. Aircraft arrive early or late. Passengers miss connections. Equipment needs repair. A gate becomes unavailable. A security issue emerges. A piece of baggage requires attention. A medical emergency occurs. A flight is delayed somewhere else in the

network and its consequences travel with it.

Yet the airport keeps adjusting.

We, sitting in a departure lounge, may experience this only as a message on a screen: Delayed. This single word, that can contain an extraordinary amount of work.

We may sigh. We may complain. We may call someone and say, "The flight is delayed again."

Meanwhile, somewhere behind the scenes, people are recalculating, coordinating, moving, repairing, communicating and trying to restore a sequence that has been disturbed.

This is not an argument against complaining. Passengers are entitled to be frustrated. Time matters. Missed connections matter. Long queues matter. Accessibility matters. Efficiency matters. But perhaps there is room for something else alongside our frustration: curiosity.

What does it actually take to move thousands of people safely through one building and then into the sky?

The answer is not simply technology. It is people.

The person checking the equipment before it is needed. The person cleaning an area before the next group arrives. The technician who notices a problem before it becomes a failure. The baggage handler moving luggage that we will never see again until it appears at our destination. The person ensuring that a wheelchair is ready. The worker making sure supplies are where they need to be. The countless people whose names we will never know and whose work we may never acknowledge.

Airports remind us of something that extends far beyond aviation. We are surrounded by systems we take for granted.

A hospital functions because hundreds of roles connect. A hotel works because dozens of invisible tasks happen before a guest notices anything. A city works because water, electricity, waste management, transport and maintenance operate



continuously. Even our homes depend on systems we rarely think about until something fails.

We notice the light when it does not switch on. We notice the internet when it disappears. We notice the lift when it stops. We notice the airport when the flight is delayed. Perhaps we should pay a little more attention before the failure.

There is a quiet lesson here about work itself. We often celebrate the visible achievement - the aircraft taking off, the flight arriving, the passenger reaching the destination. We rarely celebrate the hundreds of small actions that made that achievement possible.

And perhaps that is because good systems have a strange quality: they make difficult things look ordinary. The aircraft arrives. The gate opens. We walk out. Simple. Except it isn't.

Behind that apparently simple moment are schedules, safety checks, people, equipment, communication, maintenance, coordination and timing - all converging so that we can simply pick up our bag and walk towards the exit.

The next time we enter an airport, perhaps we could look differently.

Notice the person who is moving with purpose while we are wandering,

Notice the equipment that seems to be everywhere. Notice the constant movement around an aircraft. Notice how many people are making our apparently simple journey possible.

And when we inevitably find ourselves walking what feels like the longest corridor in the world to reach Gate 38, perhaps we can complain a little less.

Or at least complain while walking. There is usually still a flight to catch.

Because an airport is not merely a place where aircraft arrive and depart.

It is a remarkable reminder that large outcomes are often held together by small things, quiet people and thousands of actions that nobody notices.

Perhaps the best tribute we can pay to such a system is not to marvel at it every time we travel. Perhaps it is simply to remember that when everything appears effortless, it probably isn't.

We see the aircraft. We see the journey. We see the destination. But behind every flight is an airport we never see.

The writer is a certified yoga teacher, and heads marketing in a multinational company.

100 Years Ago



Front page of The Statesman dated 28 August 1926

OCCASIONAL NOTE

MR. A. V. V. Aiyar, whose death we announced yesterday, was a distinguished officer of the Finance Department who had the gift of writing lucid and valuable reports on currency matters. He was known in Calcutta, where he served for a time as Currency Controller, but did most of his twenty-eight years' service at Simla and Bombay. Selected as joint secretary to the Hilton Young Commission, he was prevented from joining it by the illness which has now terminated fatally. He was one of many Madrasis who have found opportunities for their special abilities in the Finance Department; it was a common exaggeration some years ago to regard that Service as practically a Madras monopoly, though vacancies were usually filled by competitive examination.

News Items

GERMANY AND THE LEAGUE

HOPEFUL OUTLOOK FOR GENEVA

BERLIN, AUG.

THE Foreign Affairs Committee of the Reichstag have received Herr Stresemann's report on the foreign political situation, and have learned that the Foreign Minister is, on the whole, confident that the difficulties regarding Germany's entry into the League of Nations will eventually be removed. He does not expect serious opposition by Spain, who is considered to be fully occupied with the Tangier problem, in which Germany is not interested.

Herr Stresemann pointed out that Lord Cecil's plan must still be taken as a basis for negotiations by the committee, which approved the Government's attitude and finally rejected the Communist motion demanding the withdrawal of Germany's application to enter the League.—Reuter.

GREEK CABINET OF SERVICE

KING GEORGE AND THE THRONE

ATHENS, AUG.

IN accordance with the decision of the party leaders to form a Cabinet of Service, consisting of civilians, under the leadership of M. Kondilis, as head of the National Democratic Party, M. Kondilis has formed a Cabinet in which he himself is Minister of War and Marine.

Professor Petmozas, Minister of Interior and Justice; M. Argyrepoulos, formerly Minister at Angora, Minister for Foreign affairs; Professor Triandafilopoulos Minister of Communications; M. Papas, who is a distinguished surgeon, Minister of Public Instruction; M. Drossepoulos co-Governor of the National Bank of Greece, Minister of Finance and M. Nakes, who is a lawyer, Minister of Agriculture.—Reuter.

VITAL QUESTION

FREE PASSAGE THROUGH THE MEDITERRANEAN

LONDON, AUG.

THE Daily Telegraph, in the course of a leader remarking on the Spanish Note which has now been presented in London and Paris, says that in addition to France there is no doubt that Britain is opposed to linking the questions of Geneva and Tangier. The former is purely a matter for the Assembly of the League of Nations, while Tangier is a question which is largely strategic, pointing to the defence of the Empire based on a free passage through the Mediterranean, including an unassailable position at Gibraltar.

The paper concludes by saying that any readjustment of that region must not prejudice our principal interest in it, and must satisfy in that connexion both the British and Dominion Governments, in whose joint system of defence the Western entrance to the Mediterranean plays so vital a part.—Reuter.

Who pays for India's UPI revolution?

SHREY MADAAN

India spent years making digital payments seamless to consumers. Scan a QR code, enter a PIN, and the transaction is done. Now, as UPI enters its next phase, people face a major dilemma: how do you keep a payment system affordable and innovative when the infrastructure behind it is not free to maintain?

The government has opened the door to a Merchant Discount Rate (MDR) on a limited category of high-value UPI transactions, while assuring that Person-to-Person (P2P) payments will remain free. The Finance Ministry argues that rapidly rising transaction volumes require continued investment in cybersecurity, fraud prevention, and digital infrastructure, which cannot be sustained only by subsidies.

There is a reasonable case for that approach. UPI has become one of India's most important components of digital structure. It processed 2,366 crore transactions worth nearly 299 lakh crore in July 2026 alone, according to the government. The success of UPI, however, was built on simplicity and low costs. Any change to its economics should therefore be judged not only by the revenue it generates, but by whether it preserves

the competitive environment that made digital payments successful.

That distinction matters because MDR is ultimately a cost of accepting payments. Even if consumers are not charged directly, merchants may have to bear the expense. The government has sought to limit this concern by saying that any MDR would apply only to a limited set of transactions above a threshold, while small merchants and ordinary users would remain protected. But a cost that enters the payment ecosystem does not necessarily disappear simply because it is not displayed on the consumer's screen.

India's UPI shows why pricing matters. MDR was set to zero for UPI and RuPay debit card transactions in January 2020 to encourage digital-payment adoption. Since then, UPI has become deeply embedded in everyday commerce, with total annual transactions increasing 12,000-fold since FY 2016-17. The zero-MDR model clearly helped create the conditions for rapid adoption. The question now is not whether the zero-MDR model delivered results. It clearly did. The question is whether a carefully calibrated revenue model can fund the next stage of growth without undermining the affordability that made UPI successful in the first place.

This does not mean India should preserve a zero-cost model regardless of its consequences. Payment providers need viable business models if they're expected to invest in better technology and security infrastructure. The government's argument that the ecosystem must become more financially sustainable should be taken seriously. The real question is where to strike a balance: adequate revenue to sustain investment and coverage and enough competition to keep platforms innovative while protecting consumers from hidden costs.

PhonePe and Google Pay still account for roughly 79 per cent of UPI transaction volumes, although their combined share has recently fallen below 80 per cent as smaller platforms such as Navi and super.money gain more ground. That is encouraging, but it also shows how cluttered the market is. A payment ecosystem that relies heavily on a few platforms should be careful not to create economic conditions that make it harder for new players to enter, experiment, and attract consumers.

This is where UPI's next chapter could be different from its first. India's digital payments revolution succeeded because consumers were given a system that was convenient, interoperable, and inexpensive.



Competition between payment platforms helped reinforce that convenience. The next stage should preserve those advantages rather than assuming that scale itself will ensure continued innovation.

There is also an important distinction between making UPI sustainable and making it expensive. The two are not the same. A well-designed payment ecosystem can generate revenue for providers while keeping basic transactions affordable for consumers. The government has already indicated that any future MDR would be substantially below typical debit and credit card rates. The challenge is to ensure that any eventual framework remains transparent and proportionate while

preserving the openness that made UPI successful.

UPI does not need to remain artificially free at any cost. Nor should sustainability be used to justify weakening competition or passing unnecessary costs down the chain. India's real challenge is to design an economic model that gives payment providers room to invest, gives new players room to compete, and keeps digital payments affordable for consumers. UPI has already shown the world what India can build when technology and competition work together. Its next test is whether policymakers can preserve those same principles as the system matures.

The writer is Indian Policy Associate, Consumer Choice Center.

Crossword | No. 293565

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Yesterday's Solution

S I D E B Y S I D E E T C H

A E R H I T H A

D I S C O B S E S T I O N

C K U P T I S O

Q U E U E D M I G R A T E S

U N E N D R E E L

A I D E D E D I C A T E E S

F E L T T I P P E N A B B A

F I R O D S P E A G

F O G B O U N D U P D A T E

O H K D S L R

R O T T E N E S T A L L E N

C E N E S N A

E A R L S T O P T H E G A P

ACROSS

1 Mishap ultimately stops new girl with Angus making European Festival (9,5)

9 Barely spot obvious signs of injury (5)

10 Partner is desperate to become known (9)

11 Emphasise instruction to student for improving ungrammatical essay? (9)

12 Popular tenor starts to ruin ostentatious musical opening (5)

13 Contradiction of soldier coming to place where sailors

15 Some inconspicuous car certainly is harder to find (7)

18 Salesman born in Idaho felt discontent (7)

20 Without nurse regularly around, must reset bone (7)

21 Two leading characters dropped from pleasant story (5)

23 Pen sort of language that's found on UK banknotes (5,4)

25 Cake that was to help neither side during World War II reportedly? (5,4)

26 Head of society chasing supporters for money (5)

27 A charge that is concocted to arrest international author (6,8)

DOWN

1 Desktop image that is cut and pasted (9)

2 Tour de France winner runs over towards parents initially. Sweet! (5,4)

3 Completes puzzle, on reflection admitting surprise (5)

4 Ten grand used up entertaining American with meal and posh cakes (7)

5 Sisters experience taking out first European young boys (7)

6 Start eating, it's freshly made (9)

7 Tackle landlord about source of infestation (5)

8 Ban day of celebration supported by electorate essentially (4)

14 Admit nine Euros went oddly missing in collection plates (6,3)

16 Close friend of Tory worker seen outside bar (9)

17 Think nostalgically about car having small coupé's shell (9)

19 Tactful individual must sacrifice time to get qualification (7)

20 Crushing retort from second schoolmaster to Billy Bunter (7)

21 Mouldy smell caused commotion, so to speak (4)

22 Former Welsh politician avoids criticising fancy jewellery (5)

24 Name major road in Middle Eastern city (5)

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

INTERNATIONAL EDITORIALS

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EDITORIAL

Metropolis tender winner offers a useful blueprint

The HK\$1.03 billion tender for 10.5 hectares in the Northern Metropolis is a landmark in Hong Kong's development. A consortium comprising five mainland state-owned and private companies as well as local developer Sino Land has been awarded the first batches of land in the pilot area in Hung Shui Kiu. The mainland partners will diversify the financial risks and help Hong Kong align with national goals under the 15th five-year plan. The transaction sets a good example for structuring complex, multifaceted urban development. On the face of it, the land premium does not reflect a project of this scale. Viewed in isolation, the figure understates the underlying economics, but the true financial commitment is staggering, with the total investment projected to reach HK\$16.8 billion.

This highlights the complexity of the project. The consortium is taking on multibillion-dollar responsibilities for infrastructure development and land formation, costs that would otherwise be borne by the government. By shouldering them, with Beijing's support, the developers are demonstrating long-term commitment and confidence in the Northern Metropolis project.

Even though the land premium looks low, this is still a significant signal from the market, given scepticism about how enthusiastic developers would be about the project. Critics questioned whether the private sector – and specifically major mainland enterprises – would put real capital behind such a long-term, visionary governing initiative. On a massive, multifaceted development such as this, a consortium of local and mainland groups has proved to be the way to go.

The tender answers doubts, despite a challenging macroeconomic environment. As Secretary for Development Bernadette Linn Hon-ho rightly noted, these enterprises have cast a tangible "vote of confidence" in the Northern Metropolis. The willingness to absorb high infrastructural costs and commit billions to a multi-year timeline speaks volumes about recognition of the project's strategic value.

Mainland enterprises are now set to be key players in projects in the Northern Metropolis, a 30,000-hectare mega-development close to the city's border with the mainland, destined to become an economic powerhouse and housing hub. Real estate experts say more flexible tender arrangements and other terms may be necessary if more companies are to take part in future bids.

Meanwhile, the joint venture between subsidiaries of state-backed developers China Merchants Land, China Resources Land (Overseas), China Overseas Land & Investment and CITC Investment, mainland e-commerce giant JD.com and Hong Kong developer Sino Land is a blueprint for the future.

The Development Bureau said the consortium would carry out site formation works on three plots of residential land and build more than 3,000 flats.

It would also form a site earmarked for company and technology park developments and build a smart logistics centre, with JD.com taking part as a strategic enterprise. JD.com will occupy at least 15,300 square metres, around 30 per cent of the facility's gross floor area, in 55 months. The consortium will return two enterprise and technology park plots and a government, institution or community site to the authorities by 2028 after completing site formation.

The outcome of the tender is a reminder that the value of major land disposals of this kind should not be judged solely by the land premium but also by the long-term economic benefits of diversified, forward-thinking development.

Massive, multifaceted projects like the one at Hung Shui Kiu require a diverse range of expertise, from traditional real estate development to modern logistics and commercial planning. The consortium approach allows corporate giants to pool financial resources, share risks and coordinate expertise such as local real estate experience with deep industry knowledge in logistics, e-commerce and cross-border operations.

By uniting a local property stalwart with mainland industry leaders to share risks and rewards, this project establishes a diversified development model. It sets a practical example for how future phases of the Northern Metropolis – and similar large-scale urban initiatives – can be successfully tendered, funded and built.

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Asean must secure AI strategic autonomy

The coming decade will determine whether the bloc remains a consumer of artificial intelligence or gains the technological agency to shape the emerging global order

International relations has long measured power through familiar instruments: military capability, territory, energy, capital and control of trade. The digital revolution added information to that equation. Artificial intelligence (AI) is taking the transformation further by turning information into a strategic capability that can shape economies, governments and societies.

For the Association of Southeast Asian Nations (Asean), the central question is no longer whether Southeast Asia will participate in the AI revolution. The more consequential question is whether Asean will possess enough control over the infrastructure, knowledge and systems behind AI to shape its own future or whether it will have to rent intelligence from others.

Malaysia and Singapore are emerging as major regional hubs, while Indonesia and Thailand seek to capture a larger share of the digital infrastructure boom. However, beneath this expansion lies a paradox: Asean might provide the land, electricity, connectivity, markets and physical infrastructure while depending on external powers for chips, foundational models, cloud platforms and technological standards.

This marks a dependency: states retain sovereignty while relying on foreign AI systems to run critical functions. This matters because Asean's traditional concept of strategic autonomy was developed in a world where states could diversify their relationships without necessarily having to choose their technological architecture.

The United States and China are developing competing technology ecosystems. Reuters reported this month that Washington was preparing to encourage countries taking part in its Pax Silica initiative to choose between US and Chinese AI frameworks. Meanwhile, China is expanding AI engagement with Southeast Asia through training, infrastructure, research and industrial applications.

For Asean, technological pluralism is essential. It must

cooperate with multiple powers while avoiding dependence on any single AI ecosystem.

This is where the idea of intelligence dependency becomes important. Technological dependency means relying on another country for technology, but intelligence dependency goes further. It means relying on external systems to process information, predict outcomes and assist in decisions that affect how societies function. Whoever controls those systems possesses a form of power that is less visible than military coercion but is more deeply embedded in everyday governance.

It is a contest over who controls the infrastructure through which societies think

Therefore, Asean needs to move to intelligence resilience. This does not mean trying to manufacture every chip or build a frontier model in every member state. Instead, strategic autonomy means maintaining alternatives: regional computing capacity, trusted data systems, multilingual AI models, local technical expertise and interoperable standards.

China-Asean cooperation could become particularly important. The inauguration of the China-Asean Artificial Intelligence Industry Innovation Centre in Beijing in May marked a further institutionalisation of cooperation in AI development and applications. China's strengths in manufacturing, digital infrastructure and large-scale AI deployment offer Asean valuable opportunities, but the objective should not be to replace dependence on US technology with dependence on Chinese technology.

China could support Asean's AI capacity through research, training, infrastructure and technology transfer, fostering mutual interdependence rather than technological patronage.

The same logic applies to the wider Islamic world, particularly the Gulf. The US, China, the Gulf and Asean possess complementary strengths and could become centres of strategic agency.

However, there is a physical constraint. AI requires enormous quantities of electricity, cooling and infrastructure. Southeast Asia's data centre boom is already raising concerns over water and energy consumption.

Asean should respond through an AI strategic resilience framework built around four pillars: computing capacity, data capacity, human capacity and institutional capacity. It should support regional research centres, trusted data-sharing mechanisms, independent testing of high-impact AI systems and standards for AI infrastructure.

Major foreign data centre investments should also be assessed against energy, water, cybersecurity and local skills-development requirements. The strategic objective should be simple: open to all, dependent on none.

The emerging contest is not simply a race between American and Chinese AI. It is a contest over who controls the infrastructure through which societies think, calculate and make decisions. Asean and the Islamic world should not become passive arenas in that competition.

The coming decade will determine whether Asean remains an AI consumer or gains the technological agency to shape the emerging global order. The choice is not between technological dominance and isolation but between strategic dependence and strategic agency.

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AbdulWahed Jalal Nari

LETTERS

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Insurance model for gig workers

Labour protection for delivery riders remains controversial in Hong Kong. Critics cite higher corporate costs and potential impacts on catering businesses, yet the rights and safety of riders cannot be sidelined. When Deliveroo left the city in 2025, 200 full-time staff received severance pay, but 12,000 self-employed riders were left with nothing. Some injury claims became unenforceable once the platform closed.

This is not an isolated case: commercial insurance offered by local delivery platforms frequently provides compensation far below the statutory standard set by the Employees' Compensation Ordinance. The draft bill on injury compensation for digital platform workers is a welcome step, but legislation alone cannot close the gap. The mainland's dual model – combining government safeguards with proactive corporate responsibility – is mature and worth studying.

Under the mainland's pilot occupational injury insurance programme for workers in new forms of employment, platforms pay only a small premium per order, allowing costs to flex with demand and fit the volatile gig economy. By June, nearly 30 million workers nationwide had joined the programme. Government-run administration also streamlines claims, reducing disputes and delays.

Corporate responsibility is equally important. The experience of JD.com shows worker welfare is not merely a cost but a long-term investment and responsible

behaviour. This approach delivers three measurable gains. First, its S&P Global corporate sustainability rating was the highest among Chinese retail firms, helping lower financing costs and strengthening brand trust. Second, lower rider turnover improves service quality, with the company leading the industry with a user satisfaction score of 95 in 2025. Third, proactive investment also reduces compliance risks and sets benchmarks for competitors.

Clearly, firms can and should go beyond minimal legal requirements.



A Deliveroo rider in Mong Kok in 2025. Some 12,000 self-employed riders were left without severance pay when Deliveroo left the city that year. Photo: Sam Tsang

Labour protection is not a luxury but a win-win for companies, riders and society. In the meantime, the Hong Kong government should look into adapting lessons from the mainland while also considering supportive measures such as tax incentives for businesses and issuing stakeholder guidelines.

A sustainable economy rests on protected worker rights and collaboration among various stakeholders. Legislation provides the baseline, but corporate responsibility is the true engine of sustainable progress.

Chen Zihan and Liao Xiru, students, and Dr Chris Cheung, lecturer, Wu Jieh Yee School of Interdisciplinary Studies, Lingnan University

Ties must look beyond Hasina

India and Bangladesh share one of South Asia's most consequential relationships. Their 4,096km border,

shared rivers, trade, energy links and security interests make stable cooperation indispensable. Yet rebuilding trust now requires New Delhi to recognise that Bangladesh's political landscape has fundamentally changed.

Over 15 years, India developed exceptionally close ties with Sheikh Hasina's Awami League government. That cooperation produced gains in connectivity, border management and security. But relations between two states cannot remain anchored to one leader or party. Many Bangladeshis believe India still views their country through a "Hasina-centric" lens. Diplomacy depends not only on official intentions but also on public confidence. That confidence will remain difficult to restore if Indian territory is perceived as a platform for political activity by Bangladesh's former leader.

Bangladesh's expanding engagement with China should not automatically be interpreted as hostility towards India. Dhaka is also strengthening relations with Japan, the United States, Europe and the Middle East. Such diversification is normal for a sovereign state seeking economic opportunity and strategic flexibility. Nor can Bangladesh afford an anti-India foreign policy. India remains its most important neighbour. Equally, an India-centric foreign policy would constrain Bangladesh's sovereignty and options.

The way forward is neither nostalgia nor a contest over which country would suffer more. India should engage Bangladesh as a sovereign society. Dhaka, in turn, should pursue cooperation without surrendering strategic autonomy.

Shahidul Alam Swapan, Geneva



Illustration: Kaliz Lee

World economy needs new Helsinki process

Cold War rivals used ground rules to make competition more transparent, bounded and predictable. Today's weaponised trade participants need the same ambition

Forty years ago, the Stockholm Document turned the political promise of the 1975 Helsinki Final Act into a more practical system of confidence-building. Amid the Cold War, Europe's East and West did not disarm, abandon deterrence or begin to trust one another. Instead, they agreed that military competition could be made safer through prior notification, observation, information exchange and verification. The lesson was modest but durable: adversaries do not need trust to reduce uncertainty.

That logic is now needed. Today's world is not divided into Cold War-style military blocs. Yet in trade, technology, artificial intelligence, critical minerals and supply chains, security-oriented economic networks are forming around the United States and China. Export controls, sanctions, investment screening, industrial policy and resource restrictions are turning interdependence into a potential source of vulnerability.

For three decades, globalisation rewarded concentration. Firms sourced from the cheapest producer, countries specialised and supply chains were designed around "just in time". That lowered costs, but also created chokepoints.

Once governments began to regard dependence as a national security risk, the organising principle changed. Efficiency gave way to resilience; "just in time" increasingly became "just in case".

Some redundancy is rational. Gulf states amid the Iran war have built oil pipelines that can bypass maritime chokepoints. European governments are trying to restore domestic capacity for medicines and pharmaceutical ingredients. Countries are stockpiling food, energy and strategic materials, while firms diversify suppliers and duplicate production.

The problem is that one country's resilience can look like another country's preparation for decoupling. Each step may be rational in isolation; collectively they create a security dilemma in which everyone pays more to insure against everyone else.

The answer is not to return to "hyper-globalisation". Nor is it realistic to abolish sanctions, export controls or industrial policy. The more useful question is whether governments can place limits around their use. The aim should be to reduce the costly redundancy driven by a fear of arbitrary geopolitical disruption.

A geo-economic Helsinki process should begin with a narrow floor for essential civilian functions. Basic medicines are an obvious case. China and India have become major upstream suppliers of antibiotics and pharmaceutical ingredients, while Western firms and financial systems control other critical medical technologies, services and transaction channels. Food and fertilisers provide another case: interruptions can rapidly become humanitarian crises.

There is precedent. In 2022, World Trade Organization members agreed that food bought by the World Food Programme for humanitarian purposes should be exempt from export prohibitions or restrictions. The principle is important: states may retain economic security tools while accepting that certain civilian needs should remain outside coercion.

That principle could be widened carefully. A first basket might cover basic food, designated essential medicines, emergency agricultural inputs, clean water supplies and the

candidates for an initial agreement. The Helsinki approach succeeded precisely because it began with limited rules that made behaviour more predictable.

The bargain must also be reciprocal. China and other major producers could accept restraints on politically motivated disruptions of designated essential physical supplies. The United States and its partners could guarantee that sanctions, financial controls, insurance restrictions and technology rules do not obstruct agreed humanitarian flows.

The objective would not be to de-weaponise economic statecraft, but to civilise it. What such rules would create is bounded certainty: even during a severe political crisis, governments and firms would know that some essential channels should remain open.

Middle powers have a particular interest in such rules. They are often connected to both US- and China-centred economic networks and bear large costs when competition becomes systemic fragmentation. Asian members, Gulf countries, India, Switzerland, Brazil and others need not form a third bloc. Their role may be to preserve cross-system connectivity and turn functional multilateralism into institutional guardrails.

There are useful efforts to organise thinking about this new landscape. The Helsinki Geo-economics Society's New Helsinki Process is developing a Helsinki Manual on Corporate Geo-economics, mapping economic-security regulation and corporate responses across trade, investment, finance, industrial policy and technology. The next step is to ask whether the Helsinki logic can move from understanding geo-economic competition to stabilising it.

The original Helsinki process did not end the Cold War. The Stockholm Document did not make Nato and the Warsaw Pact trust each other. They made parts of rivalry more transparent, bounded and predictable. The global economy now needs the same ambition: decide what must remain outside the battlefield, and build rules that make the rest of the competition less dangerous and costly.

Hao Nan is a Susan Strange Associate Fellow with the Helsinki Geo-economics Society, and a Nuclear Futures Fellow with Ploughshares Fund & Horizon 2045



Hao Nan

Build a theatre equivalent of a hawker centre

Demolish Hong Kong Stadium and replace it with a dining-infused cultural and entertainment cluster

On a Saturday evening, Causeway Bay crackles with its famous retail energy, yet by 9 o'clock the streets begin their nightly death. There is nowhere magnetic to spill into – no late-night jazz den, immersive dinner theatre or playhouse humming with an experimental musical. Nearby, the 40,000-seat Hong Kong Stadium squats in silence while the catering rooms of the Happy Valley racecourse sit largely empty on non-race nights.



Mathias Woo

This dead zone between one of the world's densest shopping districts and a historic sporting valley is a failure of urban imagination. The remedy is hiding in plain sight: demolish the obsolete stadium and replace it with a dense, dining-infused cluster of at least 20 small to medium-sized theatres, physically linked to both the racecourse and the Lee Garden retail corridor.

International producers of first-run musicals routinely bypass our city. The hottest Broadway and West End transfers increasingly open in Shanghai or Shenzhen. The issue is simple: venue supply rather than audience taste or ticket pricing. Hong Kong's cultural infrastructure remains trapped in a binary: a few cavernous halls or shoebox black boxes.

What every world city has – and what we lack – is the theatrical equivalent of a hawker centre: a dense, walkable precinct of contrasting performance spaces, each with integrated food and beverage options.

Happy Valley's stadium site is the only plausible venue. With the Rugby Sevens migrating to Kai Tak, the concrete bowl has lost its purpose. Raze it, and in its place build a theatre village of deliberately contrasting venues, clustered around a lantern-lit central piazza.

Picture a doorway leading to a sumptuous 800-seat Cantonese opera house that evokes the lost glory of the original Lee Theatre – the fabled Percival Street venue that was the spiritual home of Cantonese theatrical tradition right in Causeway Bay's heart. A new Lee Theatre within the cluster would reclaim that heritage.

Next door, a 1,500-seat Broadway-calibre musical theatre would compete for first-run productions that currently head north. Across the courtyard, a 400-seat jazz and cabaret supper club could host late-night vocalists, while a thrust stage drama theatre, sprung-floor dance house, dedicated children's theatre, indie live-house and black-box Cantonese comedy studio would complete the mix.

Twenty-plus distinct venues turn a single-destination evening into a multi-night draw. A tourist might have dim sum at the Cantonese opera on Friday, take in a Broadway musical on Saturday afternoon and enjoy a negroni-fuelled jazz set that night – all without calling a taxi.

Every venue must integrate dining and drinking into its architecture. When performance and gastronomy are inseparable, a full sensory journey ensues.

Shenzhen can build shiny multiplexes inside shopping centres, but it cannot fabricate the heritage-infused, walkable, alfresco atmosphere of a Happy Valley theatre quarter – provided we build it.

“
When performance and gastronomy are inseparable, a full sensory journey ensues

The physical linkage makes this vision economically irresistible. Lee Garden Five and the Hysan Swire ecosystem already channel a wealth of high-spending visitors daily. An air-conditioned, art-lined pedestrian spine must extend directly from Lee Garden Five along Hysan Avenue and Leighton Road, pulling that footfall naturally towards the theatres.

On race nights, the Jockey Club's superb restaurants and members' boxes can absorb the overflow seamlessly. Ticket packages combining a race day buffet with a post-race musical will become a unique selling point.

On non-race nights, those same Jockey Club catering facilities could transform into pre-theatre supper clubs, jazz brunch venues or late-night dessert bars serving the theatre crowds. The entire valley should pulse as one integrated entertainment ecosystem, ending the absurdity of two great institutions staring silently at each other.

The government must zone the stadium site for a cultural and entertainment cluster, mandating a minimum number of small to medium-sized theatres, compulsory food and beverage integration and a design brief that compels physical linkage with both the racecourse and the Lee Garden extension.

Land release will be the catalyst. Once the footprint is available with a clear cultural zoning, developers, the Jockey Club and international theatre operators will invest because Causeway Bay's guaranteed footfall curbs the proposal's risks. Venues bring investment, and investment creates the fresh, layered experiences that keep a city alive after dark.

For too long, Hong Kong has believed a single flagship venue can anchor its cultural identity. To compete with Shenzhen, we must stop playing the scale-and-cost game and instead offer something algorithm-optimised malls cannot replicate: a dense, character-rich, dining-infused cluster where Cantonese opera, Broadway musicals, jazz cabarets and experimental theatre hum side by side.

Tear down the silent coliseum. Build the 20 stages. Let Causeway Bay's crowds flow into Happy Valley, and let the valley sing back every single night.

Mathias Woo is co artistic director and executive director of Zuni Icosahedron

OPINION

What the average cannot see



RUMAITHA
AL BUSAIDI

The writer is an environmental strategist and advocate for sustainable development

MOST DAYS, a wadi in Oman looks like empty ground. The stillness is convincing enough to make permanence feel plausible; heat settles over gravel, the channels remain dry, and all that open space can seem to be waiting for a more useful purpose. Then rain falls somewhere in the mountains, water gathers speed, and the landscape changes in hours. The wadi has not become something else. Its other condition has simply arrived, exposing how easily we had judged its purpose by the condition we encountered most often.

I was thinking about this again in São Paulo this week while moderating a discussion on food security and resilience. Brazil is a major global agricultural powerhouse and still imports around 85% of the fertiliser it consumes. The scale is enormous, but so is the dependence on systems whose robustness is easiest to ignore while they continue to work smoothly. Our conversation kept circling back to resilience, what allows a productive system to keep moving when the conditions beneath it shift, and how abundance can depend on things beyond our immediate control.

Olivier Hamant, the French biologist, described this changing world as a passage from the era of the mean into the era of the

standard deviation. His deeper argument is about robustness, about what happens when systems built for performance encounter a world that does not behave within the range they were optimised to expect.

We have become extraordinarily good at planning around averages; rainfall becomes a design assumption, temperature a threshold, demand a forecast, and forecasts slowly acquire the authority of fact.

The same instinct has shaped what we remove.

Inventory looks idle when shelves are full, a second supplier looks expensive when the first is reliable, spare capacity looks wasteful when demand behaves, and open land invites another use when water is absent. Wetlands, mangroves and healthy soils carry the same difficult kind of value.

Their worth is easiest to overlook during ordinary years because a buffer earns its keep in the deviation; when the shipment fails, the transformer breaks or the water rises, what once looked excessive becomes the margin that absorbs the shock.

Between sessions at the Arab-Brazil economic forum, someone told me about the capybaras that wandered into a state legislature building a few weeks earlier. These heavy-barrel shaped animals walked in from the park beside it, crossed the reception

As natural systems are pushed beyond what they can regenerate or absorb, the margin around the forecast narrows from both directions via what we build and what the living world can carry

area and reached the turnstiles before stopping. The final boundary between park and parliament was a machine built to count people, faithfully holding a distinction the animals themselves had never needed.

The story made me laugh, but got me thinking about my own work sitting inside this logic. I spend much of it around projects measured in decades, where forecasts become assumptions, assumptions enter models, and models eventually harden into infrastructure.

The longer the horizon, the more I wonder what disappears when precision gives us confidence that the range around the forecast can be narrowed away. Ecological overshoot sharpens that unease: as natural systems are pushed beyond what they can regenerate or absorb, the margin around the forecast narrows from both directions via what we build and what the living world can carry.

The dry wadi and the flooded wadi belong to the same landscape.

One is simply easier to build our expectations around. The open ground remains through another season of heat and gravel, carrying no obvious return, while somewhere beyond sight the possibility of water remains part of its design. It was never empty. We had forgotten how to value what had not yet been asked of it.

LEBANON ACCUSES ISRAEL OF BURNING FOREST, FARMLAND

As extreme heat fuels wildfires worldwide this summer, Lebanese officials and residents have accused Israel’s military of systematically sparking blazes that have burnt swathes of forest and farmland in the country’s south.

In the village of Shaqra, Haidar Qoteish, 36, says he has watched fires devour fields and orchards in his hometown of Hula, just five kilometres away but under Israeli military control. “They’ve burnt everything. You can see the fields are all black,” the father of four said by telephone.

Lebanon’s governmental National Council for Scientific Research (CNRS) says Israeli military activity has caused 160 square kilometres of land, half of it agricultural, to go up in flames since hostilities between Israel and Hezbollah began in October 2023.

The latest bout of fighting flared in March when the group drew Lebanon into the Middle East conflict by attacking Israel, triggering massive Israeli air strikes and a ground invasion.

Despite a lull in hostilities since June and an Israel-Lebanon deal that month, Israel still bombs the south and has been demolishing border villages.

Lebanon’s Prime Minister Nawaf Salam has accused Israel of pursuing a “scorched-earth policy” in the south.

The Israeli army told AFP’s Jerusalem bureau it “is aware of the potential environmental impact of its operations”, which it said are “conducted while taking precautionary measures to mitigate harm to civilians and the environment”.

Hussein Fakhri, the head of the civil defence agency for the Nabatieh region, said that since July his teams have observed fires both inside and adjacent to areas where Israeli troops are stationed.

In Kfarshuba, which abuts Israel’s “security zone”, mayor Qassem al-Qadri said an Israeli attack this month sparked a fire that spread across a broad area of “mostly forest”.

Kfarshuba residents with property close to Israeli positions are afraid to take fire prevention measures like clearing undergrowth, the mayor said. Environment Minister Tamara Elzein has condemned what she called “ecocide” in the south, accusing Israel’s army of “deliberately” burning swathes of Lebanese land.

CNRS director Chadi Abdallah told AFP “fires were limited to the border strip” during the 2023-2024 hostilities, but have broadened since the conflict reignited this year. — AFP

Your team isn’t blocking innovation. You are.

A FEW months ago, I sat across from a senior leader tasked with building an innovation strategy for their organisation. Sharp. Motivated. Genuinely committed to change.

But when I asked them one question - “Which zone are you personally in right now?” - and showed them the chart, they went quiet. Not because they didn’t understand. But because they’d never examined where they actually stood. That silence told me everything. Before you can transform your organisation, you must transform yourself first.

Here’s the truth I’ve learned: Organisations don’t fail at innovation because their strategies are poorly designed. They fail because leaders ask their teams to move through uncomfortable territory they haven’t navigated themselves. Culture doesn’t follow strategy. It follows the leader. Always.

THE FIVE ZONES LEADING TO CHANGE

Think of these zones as a journey. Each requires inner work - uncomfortable, real, psychological work.

Comfort Zone: You operate from what you know. Decisions follow established patterns. The organisation runs efficiently - until the market demands something new. At this level, you’re playing it safe, which feels like control but is actually slow decline.

Fear Zone: This is where real transformation begins. You step out of what’s familiar, and doubt emerges. Colleagues question you. Outcomes are uncertain. This is the hardest zone - most leaders cycle back to comfort here. But some push through. They sit with fear, acknowledge it, and keep moving.

Learning Zone: Here, you’re



DR MARYAM
TUBEILEH

The writer is an innovation strategist and founder of Oman’s first boutique innovation management consultancy

The organisations that transform are not those with the best frameworks. They are those whose leaders have the courage to move first and the integrity to be visible in that movement



Before you can transform organisation, you must transform yourself first.

building real capability. You’re not running away from comfort - you’re running toward something concrete. You acquire new skills and new ways of thinking. Digital transformation and Innovation management frameworks become practical tools, not theoretical concepts. Your organisation starts to see actual shifts: problems are solved systematically, ideas are evaluated rigorously, failure becomes information.

Growth Zone: Learning without action is rehearsal. Growth is when you’ve practised enough that you have confidence. Now you’re not just changing yourself - you’re actively helping others transform. Your organisation starts to see measurable results.

Transformation Zone: You’ve integrated innovation thinking and growth mindset into how you work and who you are. It’s no longer a new persona. It’s coherent with your values. At this point, your organisational culture shifts from the inside out. People see that transformation works because they see it in you.

WHY THIS MATTERS RIGHT NOW

Here’s what I observe: Organisations spend millions on leadership programmes, innovation frameworks, and brilliant people in innovation roles. They announce transformation initiatives and teams. Then they’re confused when nothing changes.

The missing piece is the leader’s inner work.

As a leader, you cannot design an innovation department, announce a transformation strategy, or build a new culture while you’re still operating from your comfort zone. Your team will sense it. They’ll see the gap between what you’re asking them to do and where you actually stand. And they won’t follow.

This isn’t about being perfect. It’s about being honest. It’s about doing the psychological work first - admitting where you are, acknowledging your fear, choosing to learn, and building capability through real action. Only then do you earn the right to ask your organisation to move with you.

FOR BUILDING INNOVATION CAPABILITY, START HERE

Ask Yourself: Which zone am I genuinely in? Not where I think I should be. Where I actually stand right now.

Then ask: Am I willing to move? Because everything that follows — the decisions, the team, the culture — will be built on that honest foundation.

The organisations that transform are not those with the best frameworks. They are those whose leaders have the courage to move first and the integrity to be visible in that movement.

Before you ask your organisation to step into discomfort, step into it yourself. That’s not a management principle. That’s how change actually happens.

Diplomacy’s shifting role



SONIA AMBROSIO

The writer is a journalist, academic and researcher in media studies

It is interesting to observe how experts and media narratives surrounding the 2026 US-Israel-Iran war have largely focused on portraying Iran as the antagonist. Yet the central issue is how this conflict exposes political, economic, and diplomatic tensions.

It is necessary to distinguish between events and facts, and the interpretations placed on storylines. It is vital to note that on February 28, 2026, the United States and Israel launched missile attacks on Iran, even though international observers and mediators believed a breakthrough was about to materialise.

The United States president, Donald Trump, justified the military strikes as necessary to eliminate an imminent threat. He cited the need to permanently stop Iran from acquiring a nuclear weapon, destroy its ballistic missile and naval capabilities, and end its regional support for armed groups. Iran responded with retaliatory strikes targeting Israel and other neighbouring countries that host US forces or assist the US in conducting strikes. These are facts, not opinions, nor fiction! Half a year later, a military operation initially anticipated to be brief continues. Multiparty negotiators remain in back-and-forth dialogue, marked by threats followed by a retreat from a diplomatic solution: bombing while negotiating. The new dynamic of the conflict has moved toward the Strait of Hormuz, with oil and the global economy held hostage, echoing 1973 when Arab oil producing nations cut petroleum supplies and imposed

embargoes as a diplomatic tool against countries supporting Israel.

That is when the relevance of diplomacy becomes apparent, or not, as in politics the end justifies the means. Modern diplomacy, as a process for peace dialogue, is moving away from pragmatic-based bargaining. Instead, it is prioritising the interests of business corporations and employing unilateral coercion, with relations increasingly framed as competition.

There are fundamental reasons to explore the metamorphoses in current diplomacy, particularly when the scope of negotiations fluctuates in its achievements, broadens, or includes miscalculations, and amid a lack of expertise across the various fronts of such a complex situation. That is when we once again see the transformation of diplomacy in the Gulf states: national interests and flexible alliances come into play.

To better understand the current situation, it is helpful to look at a few details of past context. Historically, Gulf states have prioritised collective consultations within the Gulf Cooperation Council (GCC) and direct high-level discussions. This approach aimed to prevent regional conflicts from interfering with domestic economic transformations and disrupting global trade. The creation of the Gulf Cooperation Council in 1981 emerged as a tool for closer security and diplomatic coordination.

The establishment of full sovereignty for the Arab Gulf nations following the British military withdrawal from the Gulf

One consequence of the current US-Israel-Iran war is that the Gulf states are inclined to reduce their reliance on a single superpower and instead pursue diversified, cross-border relationships.

in 1970 required these young nations to develop their diplomatic corps quickly and manage relations with larger neighbouring countries. From the start, Oman has set a precedent with a unique diplomatic doctrine that remains effective today, characterised by strict non-alignment, the cultivation of security ties with Western nations, and the maintenance of open communication channels with various regional actors.

As British influence receded, the United States gradually increased its diplomatic, economic, and security presence in the Gulf, positioning itself as the main guarantor against Soviet influence and regional instability. Following the end of the Cold War's bipolar structure, regional independence emerged, with global powers interacting via economic and pragmatic alignments.

One consequence of the current US-Israel-Iran war is that the Gulf states are inclined to reduce their reliance on a single superpower and instead pursue diversified, cross-border relationships. The changing points to adaptations toward regional normalisation, economic integration, and strategic alignments.

The gap between the sides in this conflict lies between Washington's objectives and the Gulf states’ consistent priorities, which include preserving space for diplomatic options and safeguarding national interests, rather than pursuing confrontational politics or rigid divisions that could jeopardise ongoing major projects.

GULF AIR HUBS WEATHER WARTIME DOWNTURN

MAXENCE D’AVERSA

After six months of war in the Middle East, the Gulf’s major aviation hubs are navigating turbulence as a hefty portion of their lucrative transit traffic opts for other airports such as Istanbul.

Between April and June, business for Middle Eastern airlines — measured by passenger kilometres — was down 30 per cent, with that figure down close to 50 per cent on routes to Europe, according to the International Air Transport Association (IATA).

In Dubai, the number of flight seats scheduled was down 15 per cent year on year in August, the biggest drop among the world’s top 10 airports, aviation data specialist OAG said, though the UAE hub remained the world’s leading international airport by that measure.

The shock to the Gulf is significant because the region had made connecting travel a linchpin of its economic strategy.

As recently as last year, nearly one in six connecting passengers worldwide passed through the Middle East.

These travellers represented nearly half of all traffic through Dubai and the UAE capital Abu Dhabi, and almost three-quarters of traffic through the Qatari capital Doha.

Since the outbreak of war on February 28, airspace restrictions over Iran and Iraq have taken a toll.

Risk-averse European carriers have cut services to the region, making Turkish Airlines “the big winner”, according to Paul Chiambaretto, an air transport specialist at France’s Montpellier Business School.

With Russian airspace also off limits to many Western airlines, Istanbul’s strategic location has made it a desirable alternative to Gulf hubs, placing it at the “global centre of gravity for air transport”, Chiambaretto said.

Istanbul is able to connect Europe to Asia with only a slight detour, he added.

Turkish Airlines’ customer base is up five per cent since the start of the conflict, with a decrease in capacity on Middle East flights offset by a six per cent bump on routes to Europe and a 16 per cent rise for East Asia. In July, Istanbul’s main airport even overtook London Heathrow with more than eight million travellers.

The question is whether passengers will return to the Gulf once the situation stabilises.

Early last month IATA was still describing the diversion of traffic as likely a temporary phenomenon.

Ultra-long-haul flights are also bypassing stopovers. Australian airline Qantas plans to launch at the end of next year a 22-hour non-stop flight between Sydney and London using specially configured Airbus A350s. — **AFP**

Has World War III started?

SHORTLY

AFTER Russia’s full-scale attack of Ukraine in 2022, I wrote a column under the headline “This Is How World War III Begins.” More than four years on, I wonder how much I got right.

My argument was based on the origins of World War II, which did not simply start with Germany’s attack of Poland on Sept. 1, 1939. Instead, the war was an accumulation of regional wars and crises, beginning with Japan’s attack of Manchuria in 1931, which gradually gathered into a single global conflict.

That gathering, abetted by the converging ambitions of the totalitarian states and the divisions and vacillations of the democracies, led to catastrophe. Added to this was a revolution in military technology and tactics that gave the dictatorships an early advantage in offensive combat. Also an advantage: their willingness to inflict — and endure — a level of brutality and suffering their adversaries were initially reluctant to match.

In 2022, I saw a similar pattern unfolding: Decades of Western appeasement of Vladimir Putin had given the Russian strongman a sense that he could get away with nearly anything. His burgeoning ties with North Korea, Iran and especially China — memorialised by the pledge of a “no limits” partnership with Beijing announced weeks before the attack — gave him additional confidence.

But Ukraine did not, as I had feared, turn out to be the France of 1940. It was more like Britain, prepared to fight, as Winston Churchill put it that May, “however long and hard the road may be.” The Biden administration, for all its fatal hesitation about letting Kyiv take the war to Russia, at least helped ensure that Ukraine didn’t lose. Ukraine has also held the technological edge, pioneering equipment and tactics that are finally stimulating a long-overdue rethink about how wars of the future will be fought.

That’s the good news. There’s far more by way of bad news.

First, as in the 1930s and ’40s, the spheres of conflict have multiplied and are merging.



BRET STEPHENS

The author is a columnist for the New York Times

A deep US recession, or a global financial panic, will inevitably worsen every trend mentioned above. In periods of economic distress, democracies almost always become more risk-averse, while dictatorships become risk-prone.

Russia’s battlefield reversals seem to have done nothing to diminish Putin’s appetite for risk as he expands his campaign, in barely concealed attacks and threats, against Moldova, Poland and Germany, among other states, while his political allies repeatedly call for direct strikes on Europe and the use of nuclear weapons against Ukraine. More recently, Ukraine has directed long-range strikes in the Caspian Sea to disrupt Iranian military supplies to Russia.

Second, the Axis of Authoritarians has become a fully operational military alliance.

Russia is providing North Korea with help to modernise its armed forces, while the North has returned the favour by sending millions of artillery rounds and is now reportedly prepared to send thousands of additional troops to fight for Russia in Ukraine. China supplies Russia with most of the electronic components used in its drones and other military hardware. Russia has given Iran critical targeting intelligence to strike US bases and ships in the Middle East. In the event of a Chinese attack on Taiwan, Beijing could call in its chips with Moscow by engaging the aid of Russia’s powerful Pacific submarine fleet, as detailed in a new paper from the Australian Strategic Policy Institute.

Third, the West is a mess.

President Donald Trump complains of our allies’ weakness. The allies complain of Trump’s bullying, capriciousness, callowness, mendacity and incompetence. Both sides are right. The latest U.S. tariff salvo on Canada is a case in point: politically ill advised, economically self-defeating, strategically enervating.

Yet none of that erases the fact that Canada, a trade-dependent nation with the world’s longest coastline, barely has a navy to speak of, or that its government’s “new strategic partnership” with China is immoral, unwise and unsound — unless Mark Carney, the prime minister, really thinks that Trump’s idiotic outbursts are a graver long-term threat to Canada and the free world writ large than the patient designs of the People’s Republic.

Fourth, we are militarily unprepared.

The war against Iran revealed not just the munitions shortages, which helped bring the war to a premature close, but also America’s acute sensitivity to military fatalities and economic pain, which gave Iran’s leaders an asymmetric advantage given their own tolerance for human suffering. The war in Ukraine has demonstrated that even the most sophisticated US military kit is entering obsolescence thanks to the advent of AI-assisted drone warfare. The tanks we and our allies supplied Kyiv during the Biden administration “now mostly sit idle, hidden in forests and collecting cobwebs,” as The NYT reported this week.

Yet Pete Hegseth, our testosterone-obsessed defence secretary, last week decided to phase out an Army drone unit, seemingly because it was championed by generals he didn’t like.

Fifth, we may be near the economic brink. One great difference between the 1930s and the present is that, unlike then, we are not in the midst of a worldwide depression. But the warning signs of a sharp and abrupt downturn are everywhere. What happens if or when the AI boom starts to run out of steam, much as the dot-com boom did at the beginning of the century? Or if the currency crisis in Japan causes it to start selling off its US Treasury bonds? Stanley Druckenmiller, the legendary investor, recently warned in The Wall Street Journal that the Treasury Department’s bond buybacks were all but destined to fail: Ultimately, the price of a \$40 trillion national debt will be felt in sharply higher interest rates and the risks they pose to every sector of the economy that’s depended for too long on cheap credit.

A deep US recession, or a global financial panic, will inevitably worsen every trend mentioned above. In periods of economic distress, democracies almost always become more risk-averse, while dictatorships become risk-prone. That’s a pattern of history worth recalling as we continue to drift, only dimly aware, toward the gathering storm.

The FT View



FINANCIAL TIMES

"Without fear and without favour"

ft.com/opinion

El Niño's looming threat to the global food system

The world must be better prepared for big recurring shocks to agriculture

It has been a turbulent year for the global food industry. Disruption to shipping in the Strait of Hormuz has led to a surge in the price of fertiliser, fuel and cooking oil. The Ukraine war has continued to hit grain exports through the Black Sea, and droughts and wildfires, linked to global warming, have scorched crops from Australia to Europe. Now an intensifying El Niño – a climate pattern originating in the tropical Pacific that releases heat from the ocean into the atmosphere – is set to compound strains on food production and trade. The phenomenon, which raises temperatures and the risk of extreme weather worldwide every two to seven years on average, can last for up to 18 months. The latest cycle started in June, but alarming forecasts published by the

UK Met Office last week point to an exceptional rise in water temperatures later this year, which could lead to the strongest El Niño "in living memory". The resulting wilder weather is expected to dent coffee and cocoa production across west Africa and South America, while in Asia rice cultivation is at risk from weaker monsoon rains. The transportation of food and agricultural inputs could be hindered by lower water levels in key shipping routes too. Last week, the Panama Canal Authority announced plans to limit the number of daily transits through the waterway, owing to a lack of rainfall linked to the intensifying El Niño. Droughts risk sapping hydroelectric and nuclear power generation, which could add pressure to energy prices. Worryingly, the World Food Programme warns that the number of acutely food-insecure people in the most vulnerable nations could rise by a fifth to 274m by the end of 2027. Economists also expect high inflation to

be stickier. Analysts at JPMorgan estimate a severe El Niño on its own could raise global food inflation by around 0.7 percentage points at its peak. That will disproportionately hurt those in developing nations, where food expenses are a greater share of consumption. The global food system has, however, often outperformed the worst-case El Niño predictions. Indeed, in some regions the temporary shift in climate helps to diversify agricultural yields. Supply chains have tended to be more agile than expected, and new farming technologies have helped too. But the threat from El Niño is growing. First, as is clear this year, climate change and mounting geopolitical rifts are straining food supplies between cycles. Second, global warming can exacerbate volatile weather conditions when the phenomenon occurs. And finally, there is a growing body of research that suggests that a general increase in global temperatures over time may itself be increasing

Central bankers will need to be more alive to the risks of higher prices becoming embedded in inflation expectations

the intensity of the weather oscillation. In turn, the combination of climate change and El Niño means the world must be better prepared for recurring, substantive shocks to food supplies. The food industry will benefit from greater investment in early warning systems, smart-farming technologies such as soil-moisture sensors and climate-resistant crops. Governments will also need to maintain and monitor food stocks more closely, and ensure national supply chains are sufficiently diversified. International co-operation to share weather data and limit the risk of damaging trade restrictions on food and agricultural inputs will be equally important. Central bankers will need to be more alive to the risks of higher food prices becoming embedded in inflation expectations. But anticipation and adaptation have their limits. Reducing the threat that El Niño poses to the global food system in the future will warrant a faster green transition too.

Opinion Nature

Have you discovered the magic of Merlin?



Claer Barrett

The world can be divided into two types of people: those who have already downloaded the free Merlin Bird ID app, and those whose lives have yet to be enriched by doing so. Dubbed "Shazam for birds", holding your phone up to see within seconds the names and photographs identifying all the birds singing around you has unlocked the secrets of the natural world for millions, revolutionising birdwatching (or should I say bird listening?) as a hobby. I've been obsessed with birds since I was a small child. I have bookshelves groaning with field guides and more than 100 Emma Bridgewater bird mugs. I rarely leave my house near Epping Forest without a pair of binoculars in hand. But in recent years, I have observed something very excit-

sonal best time on a 5km jog. I'll be walking along through the forest and suddenly have to stop because I've heard what sounds like a new bird and need to know what it is. Last week, I turned a corner and saw a 20-something couple excitedly holding a phone in the air. "What have you Merlin'd?" I asked (yes, Merlin is now a verb). "It's a hobby!" they replied. We stood there, craning our necks, and sure enough the red-legged falcon sailed over our heads – the first time I've seen one, and an experience I'll never forget. While Merlin is not infallible, I have used it to train myself to recognise the calls of dozens more birds, and enjoy getting confirmation that I've guessed correctly. Hearing birds is a first step. Knowing where to look for them is next. You don't even need a pair of binoculars, although the £400 I spent on my Nikon Monarchs is one of the best investments I've ever made. Before too long, your Merlin obsession spreads to trying to ID what trees and plants particular birds enjoy feeding on (I use the free PlantNet app to help with this). If Merlin tells you there is a goldcrest or firecrest nearby but you can't see where it's hiding, look for a holly bush. Want to see jays at this time of year? Look near an oak tree and watch them caching acorns. Spot a clutch of teal on your next winter walk? Keep your eyes peeled for goldfinches.

Whether it's thanks to binoculars or an app, becoming more aware of our feathered friends means we are more invested in their conservation. More than half of UK songbirds are either threatened or in decline. Several readers told me they've adapted their garden planting to attract native species, and thus birds. Lots have been leaving out water in the hot weather too. A recent episode of Clarkson's Farm (which many cite as their introduction to Merlin) featured the campaigner Hannah Bourne-Taylor, whose songbird recognition skills are officially faster than the app. She convinced Jeremy Clarkson to delay mowing his grass for silage to save the ground-nesting skylarks. I have never liked him more. All the data that eager Merlin and eBird users feed back to Cornell helps them track migrant bird populations. This autumn and winter, I'm looking forward to seeing skeins of geese flying south for the colder months and the arrival of winter thrushes like redwing and fieldfares – not to mention species' seasonal murmurations of starlings. Of course, I will live on holiday. My Merlin life list. But I'll end with some sage advice from one FT reader: "Don't forget to put the phone down every once in a while and just listen."

Claer Barrett is the FT's consumer editor clae.barrett@ft.com

Letters

UK banks' approach to crypto risks choking off the sector

Your report on the letter sent from the heads of the crypto and digital assets all-party parliamentary group to all British banks about the banks' refusal to provide services to crypto companies and investors (Report, August 11) rightly exposes a problem. However, banks are also blocking everyday British consumers from transferring their own, earned money to platforms like exchanges where they can buy and sell crypto. They aren't

taking a differentiated approach to these platforms, for example, depending on whether they are registered with the Financial Conduct Authority. The banks are taking a blanket approach: they are choking off an entire sector. Starling says crypto "can result in devastating customer losses". In fact, Bitcoin and Eth (the native token of the Ethereum blockchain) have similar levels of volatility as mid cap equities,

and the top 20 crypto assets by market cap have levels of volatility equivalent to US tech stocks. Even despite the recent downturn, bitcoin is the best performing asset of the past decade. This is all taking place at a time when every bank is innovating with blockchain technology, and many are hiring crypto specialists. The blocks are anti-competitive and are cutting off an entire sector that the government has explicitly said it wants Britain to lead

the way in, internationally. If ministers are serious about Britain becoming a global hub for tokenisation and digital assets, banks cannot be left to decide which activities their customers are allowed to do. The global food system banks are held to account, rather than being allowed to hide behind risk as a reason for blanket discrimination. Katie Harries Head of Policy, Europe, Coinbase, Guildford, Surrey, UK

Rayner's announcement is some positive housing news

The letter from Kristian LT Blom of Santa Barbara, California "Debunking the idea that housing is all about supply" (July 31) argues, correctly, that relying on the private sector alone to deliver housing supply is a mistake. Housing is not just a "special kind of good" but a financial asset and "its price is set in the capital markets, not in the planning offices." If private supply is sufficiently successful as to make the price "affordable", it will threaten the value of the stock the industry holds. Private supply therefore limits itself. That is why the UK government's enthusiasm for publicly supplied housing (such as "council housing") on public balance sheets makes economic sense. Non-market housing supply can provide new affordable housing through the cycle while private developers, uncumbered by social housing obligations, get on with it, meeting market demand. Britain desperately needs growth in housing delivery. Yet we are hopelessly afraid of the government's target. A genuinely mixed economy in housing



Europe's Social Democrats are nothing like US variety

Like your letter writer Marc Chandler "Red-baiting has long been used as a US political care tactic" (August 26), I have been an FT reader for several decades and have contributed scores of published letters. However, I am perplexed at his equating the Social Democrats of Europe with the Democratic Socialists of America (DSA). European Social Democrats did not seek to end a capitalist economic system in any of the countries of western Europe and, in fact, used the manifestly clear benefits of capitalism to fund social welfare programmes. In contrast, the DSA seeks to replace capitalism with collective ownership of key industries to wit, government-owned grocery stores. Churchill's observation on the difference between the two systems bears repeating: capitalism involves an unequal sharing of blessings, socialism results in an unequal sharing of burdens. Social Democrats seek to bridge the two systems while the DSA's economic ideas have proved empirical failures everywhere they've been tried. Vijay Dandapani London TW1, UK

The tail fin tells the story

The two aircraft in the photograph illustrating your online article on the second drone found at Leipzig airport ("My plane was over hybrid attacks after second drone discovered", Report, August 26) are Antonov cargo planes. And even though the article references a Ukrainian Antonov 124 transport plane as the assumed target of the drone attack, the planes photographed belong to Russia (note the tail fin) and I suspect they have been seized. There is one in Toronto racking up a terrible parking fee after four years sitting there. Robert C Austin Professor and Associate Director, CEES, University of Toronto, ON, Canada

Mansion flat muddle

Shame one of the photos used to illustrate your 'Latter & Home mansion flat feature' ("House thinking", August 22) was actually a grand red brick Georgian house in Chelsea (note the flag) and I suspect they have been seized. There is one in Toronto racking up a terrible parking fee after four years sitting there. Robert C Austin Professor and Associate Director, CEES, University of Toronto, ON, Canada

OUTLOOK PENNSYLVANIA

Life inside an American coal mine



by Martha Muir

Entering a coal mine is just like going shopping. At least, that's what Jimmy Brock, chief executive of Core Natural Resources, the US's second-largest coal company, tells me. "When you're on the third floor of Macy's and you've gotta get to the first, some people take escalators and some take the elevator," he says. "We'll ride the elevator down." It's 20 minutes after the onset of Enlow Fork mine, around an hour's drive from downtown Pittsburgh. Before we can enter we are dressed in jumpsuit overalls, steel-toed boots and hard hats. Clipped to a belt on my hip is a "self-contained self-rescue" device designed to provide oxygen if a fire or explosion floods carbon monoxide into the air. Comparing the descent we are about to make 800ft below ground to a shopping mall seems an odd comparison – but that is the point. Brock is trying to make familiar an industry that to many Americans seems intimidating and consigned to another era. Coal's share of US electricity generation collapsed from 46 per cent in 1950 to 17 per cent in 2025, a decline triggered by poor economics and the rise of nuclear and renewable energy. President Donald Trump wants to rejuvenate the sector. But reviving an ageing industry is difficult, particularly when cheaper alternatives exist. Caught in the middle are the

miners, many of whom are fiercely protective of their jobs and industry. The corridors of Enlow Fork are lined with notices and posters with patriotic images and slogans about coal's role in powering the US. After walking through the corridors, we reach the mine elevator and down we go into the depths. When the doors open, we step into a dark courtyard lit by white lights and into the mantrap, a diesel-fuelled, low-seated railcar. For 20 minutes we travel through the dark tunnel labyrinth until finally we reach the belly of the beast, where 9m tons of coal are mined every year. Coal is extracted at Enlow Fork using a mechanised version of a centuries-old practice method called "longwall mining". Miners create parallel corridors in coal seams, leaving exposed a block of coal in the middle. In front of the block, a machine with a huge spinning blade hacks large chunks of coal off the wall. These collapse on to a conveyor belt pulled by foot-long chain links. From there, the coal is crushed and speeds away at 700ft per minute for shipment. To watch, we are enclosed in the shields, hulking steel canopies that hold up the roof until the shearer has finished its procession across the block. Then the cutting machine, the shearer, moves forward to access the next layer, and the roof collapses behind it. The scene is a bedlam of flashing lights, colossal vibrating tubes and the roar of machinery. Having forgotten my earplugs, I prepare for a

lifetime of tinnitus until someone hands me a spare pair. It's exhilarating – an overwhelming example of "industrial sublime". I understand why some miners say they grew tired of working above ground. Brock hopes to attract more young workers to the industry, who he says were scared off by naysayers predicting its collapse. "We had a very difficult time bringing miners in because of those stories. We missed two generations of kids and grandkids." The company hires 30 young apprentices, called "red hats", per year – although not all of them stay. The job is tough but the salaries are relatively high. Brock says the average annual wage for a Coal miner in Pennsylvania is \$104,000. There is, however, a dark side. While fatalities have declined sharply over the past century, six coal workers have died due to accidents this year, including two at Core Natural Resources' mines. Cases of black lung, caused by inhaling coal dust, also hit their highest level in 50 years in 2025, with 32.5 per cent of central Appalachian miners with over 25 years of underground experience testing positive over the past five years, the highest levels since the 1970s. Three deaths in Colorado brought a cold and began to sneeze black dust. It was a reminder of life underground, and probably enough to rule me out as a future red hat. martha.muir@ft.com

Opinion

The US is gambling with its role as the world's investment hub

FINANCE
Robert Armstrong



When we talk about American financial hegemony, we almost always talk about the US dollar. The resilience of the dollar system is the subject of continuous speculation. But there is a better way to frame the issue: the US's role as the world's indispensable investment destination. The world's savings are pulled to the US as if by economic gravity, crowding into American stocks and bonds and providing its economy with a key support.

If the gravity should weaken, the consequences would be large. The pillars of today's US economy – consumer spending and AI investment – are wired into the stock market. If the gravity should be boosted by the “wealth effect” of plump

retirement accounts. The data centre boom can only rip along while “hyper-scaler” stock prices give assent. And it hardly needs to be said that weaker global demand for Treasury bonds, and correspondingly higher government borrowing costs, could wreck an already wobbly fiscal outlook.

Over the past 20 years or so, US stock markets have crushed the field. Since the depths of the financial crisis, US stocks have returned almost 17 per cent a year, lapping markets in Europe, Japan, the emerging world and China. But lately things are changing. In the past two years, global stock returns have been comparable to the US, or better, especially when measured in local currencies. Meanwhile, Treasuries have come under pressure this summer, with yields on longer maturities pressing against or passing the top end of the trading range that has held since the 2021–2022 inflation.

What's happening? For stocks, there is some discomfort with the AI trade that, just a year or two ago, seemed to raise all the investors can't afford to skip the trade altogether, but neither is

there enough new money to push markets out of the trading range they've been in all summer. Maybe high US valuations are starting to pinch, too. For Treasuries, the ugliness of the fiscal situation and the indifference of Congress and the Trump administration (other than some window dressing by the Treasury secretary) seem to have finally focused debt investors' minds. Whether

If being overweight America is not the default option, it will upset the economic equilibrium

In the form of inflation, a debased dollar, or some other adjustment, the deficit chickens will come home to roost.

There cannot be a mass abandonment of US assets, just as there cannot be a mass departure from the dollar. They are simply too big and structurally superior to the alternatives. On the equity side, the US has a combination of advantages nowhere else can touch: great uni-

versities; a reliable legal system; relatively low regulation; abundant energy; a huge domestic market; relatively attractive demographics. These will persist even if the AI boom should fizzle and stock markets face a severe correction. And when US public assets – Treasuries – become less appealing, demand for US private assets (stocks and corporate bonds) may increase.

So cut Treasury exposure, and double down on US stocks? Not so fast. Public and private assets are conjoined in several ways. Most basically, as Treasury prices fall and both nominal and real (inflation-adjusted) yields increase, the discount rate applied to stocks' future cash flows rises – striking at the heart of the value proposition of the expensive tech stocks that hold up the US market. And hyperscalers from Alphabet to Oracle move to a capital-intensive business model and finance it with debt. So, because Treasury yields are an input for corporate borrowing costs, there is now more connective tissue joining the biggest companies in the stock market to volatility in the Treasury market.

Paradoxically, there is even a risk for

stock markets if government deficits are brought under control. Government deficits tend to appear on the other side of the national ledger as corporate surpluses – that is, profits. Closing the deficit will very likely be accompanied by a painful drop in earnings and therefore share prices in the short term. And the longer deficits are allowed to proliferate the harder this adjustment will be.

Meanwhile, alternatives to the US are looking more attractive. Profits at European companies are accelerating. In Japan, corporate governance reform has momentum. Emerging market countries' own fiscal situations have, in many cases, improved. Being overweight America could look less and less like the default option, and this could upset the country's economic equilibrium.

When despairing about America's public finances, it is easy to be comforted by its dynamic private economy, the world-beating markets that economy supports, and the global capital it attracts. But poor fiscal mismanagement puts the whole package at risk.

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'Cool Britannia' is back, but it needs patrons to flourish

Yana Peel

Something remarkable is happening in London. The Royal College of Art has been voted the best art school in the world for the 12th consecutive year. London's West End now attracts millions more theatregoers than Broadway. V&A East's partnership with Sadler's Wells is setting a new standard for cross-disciplinary collaboration. Tracey Emin is one of several British-born artists exhibiting internationally significant work right now, and that too in the Tate Modern, where the much-admired Jessica Morgan is returning as director. London is saturated with accessible public culture.

The last time the city felt this charged was in 1997 – “Cool Britannia” and the era-defining exhibition *Sensation* at the Royal Academy. I know because I arrived that year from Canada to participate in what followed: a deliberate national investment in culture. Britain made a bet that it should be for everyone, with free museum admission introduced in 2001. Creativity is not a luxury but essential for a thriving society and economy.

Now, in the age of AI, this investment looks prescient. Consider Anthropocofounder Daniela Amodei arguing that the humanities “will be more important than ever”, or Sir Demis Hassabis, Google DeepMind co-founder, who champions creativity and philosophy as distinctly human traits that will only increase in importance. The digital universe draws on human artistic experimentation. Microsoft CEO Satya Nadella suggests that the future belongs

London is showing what is possible in the UK, where private philanthropy has had shallower roots

not to those who replicate knowledge, but to those who reimagine it – the people who think like artists.

But art needs the conditions in which to thrive. Artists have always harnessed the material and technological advances of their times, from oil paint in the Renaissance to photography in the 19th century. At CalArts, California's pre-eminent school for the arts, I was struck by the ways students are using machine learning and digital imaging to create what's totally new.

Asia knows this. Their entrepreneurs are shaping our 21st-century art and technology, just back from Shenzhen, I am impressed that major Chinese companies are creating new institutions and hiring established curators. In South Korea, the Leeum Museum, founded by the family behind Samsung, is a prime example of how digital fortunes being made in culture.

In the US, private philanthropy accounts for over 85 per cent of cultural giving, resulting in some of the most ambitious venues ever built. In the past year New York has seen the reopening of the Studio Museum in Harlem (\$500m), the OMA-designed expansion of the New Museum (\$125m), and awaits the Metropolitan Museum of Art's transformed modern and contemporary wing (\$500m).

But London is not standing still. Recent developments show what is possible in the UK, where private philanthropy historically has had shallower roots. Last year, Sir Michael Moritz and Harriet Heyman's foundation, Crankstart, pledged £150m to the National Gallery, backing an institution Moritz sees as ranking “at the top of the global pecking order” – and enabling to push British cultural philanthropy beyond what government support allows.

Generosity can be contagious. The Julia Rausing Trust matched the Crankstart gift, making the two donations the largest ever reported to any institution in the world. The Reuben Foundation (\$500m) and the gleaming £30m for the Courtauld Institute of Art campus redevelopment.

It will take more of that energy and investment to keep ahead. The conditions for economic growth, the celebration of private and corporate philanthropy, and the open door for those around the world who wish to support are paramount. We must also hope the technology titans of today will invest in the artists of tomorrow.

The writer is president of arts, culture and heritage at Crankstart

The myth of Trump's grand strategy

POLITICS
Janan Ganesh



In Wiktionary, the online dictionary, there is an entry for “Trumpplains” (infinite verb, present tense). To Trumpplain is “to explain or rationalise Donald Trump... his actions, remarks, policies or popularity.”

What an inelegant word. As an alternative, Wiktionary offers “sanewash” (infinite verb, present tense). Thankfully, we won't be needing either for much longer. I don't suggest that Trump is yesterday's man. He will command the world's premier armed forces until January 20 2029, whatever midterm voters do in November. He might even save the face he has lost in Iran with another war or two. But nothing has died of late, and it is the contrarian case for his presidency: the insistence that he has strategic gifts imperceptible to liberal snobs.

Iran has been too big a fiasco to square with that claim. He launched the war in a fit of vengeance after previous military wins and because (in Marco Rubio's telling) Israel was going to strike regardless. Since then, Trump has not been able to define, much less achieve, victory, which seems to range in his mind from Iran's “unconditional surrender” to the mere reopening of the

Strait of Hormuz, otherwise known as the status quo ante. It is not even clear he understood the scale of the concessions to Iran that he signed in the memoranda of understanding in June. His latest gambit is economic pressure on the regime. This implies confrontation with China's Iran-enabling companies, just as Trump seeks to smooth relations with Xi Jinping.

The point is not just that his war has gone badly – even a well-planned one might have failed – but that it contradicts his other objectives, such as avoiding foreign entanglements, and bears no hallmarks of detailed preparation. In other words, it was unstrategic. It was everything that Trumpplains always denied he was. Their one option now is to dismiss the war as an uncharacteristic lapse. More likely, Trump has been acting on impulse all these years, and pure luck saved him from disaster.

The heart of Trumpplaining, the supposed rationale for all the president's strange actions, is China. Your other option is to dismiss the war as an uncharacteristic lapse. More likely, Trump has been acting on impulse all these years, and pure luck saved him from disaster.

Consider the notion that Trump withholds support from Ukraine because China, not Russia, is the real threat. Even in theory, this makes little sense. (Let us confront China by enabling a Russia-friendly war outcome that it clearly desires?) Also, in practice, Trump does things that contradict his

China hawk reputation all the time. His great friend in Europe was the former Hungarian prime minister Viktor Orbán, who was Xi's man in that continent. When it comes to America's military posture – the distribution of forward bases and so on – there has scarcely been a pivot towards Asia under Trump.

In fact, Asian democracies, even those with which the US has mutual-defence treaties, are left in constant doubt about his commitment to them. Last week, Trump asked the Pentagon to cut short a series of military drills with South Korea. The reason for this snub, which will have emboldened China and the communist part of the peninsula? “My very good relationship with Kim Jong Un of North Korea.” Thus spake the

Trumpplainers' one option now is to dismiss the Iran war as an uncharacteristic lapse

Metternich of South Ocean Boulevard. There is no through-line here, no grand plan. Trump doesn't stint Ukraine in order to free up resources for the Indo-Pacific. He stints Ukraine because he feels like it. He acts out of personal chemistry, commercial self-interest, a few half-baked beliefs and, yes, strategy. The last of these elements just tends to be overstated in the mix. (Though not by himself. The last person to go on about a Trump geostrategy is Trump, who is candid about his personal approach.)

So who is left of the Trumpplainers? Who, even after Iran, squints to see order in the bedlam? There is Elbridge Colby, the Pentagon's policy chief, whose rationalisation of his boss's random doings is creative, as a man who is always spotting faces in clouds is creative. For example, what Asian democracies are engaged in on-off US support Colby describes as “flexible realism”, which is the kind of think-tank jargon that could cover any conceivable policy at all. But he is staff. Staff have to abase themselves. The question is how people with

no career at stake – Trumpplainers are often in finance and tech – came to see Trump as someone of underrated strategic genius.

One answer is that liberal derision drove them to it. A generation ago, something similar happened regarding George W. Bush. Because he wasn't, as the *bien pensants* alleged, an idiot, it was tempting to overdo the rebuttal and suggest that he was in fact uncommonly shrewd. Call it the escalation ladder. The truth, that despite a good enough brain he was still out of his depth, got lost in the partisan crossfire.

The other answer is emotional self-protection. This is an unsettling world, and it is easier to bear if the most powerful individual of all is thought to be working to some grand geopolitical scheme. The alternative prospect, that he is an erratic and humiliated 80-year-old who has more than half a term in which to avenge himself, seems rather nearer the truth. And how often does the truth keep people warm?

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Dating, delinquents and the power of second chances

ASIA
Leo Lewis



Ruru attacked a stranger with a liquor bottle. Kazu-kun set fire to someone for a dare. Ali “the Buddha” fought his way to freedom from a police car. As role models go, Japan has never had it so good.

As millions in Japan and around the world will already know, these “yanki” delinquents feature among the cast of the second season of *Badly in Love* – a Netflix dating reality show that puts 11 young firecrackers – in some cases severely troubled – in one place and waits for Eros to light the touchpaper.

Precarious as it sounds, it is compelling watching. All the more so for the unfamiliar shading it provides to Japanese society's often black-and-white

view of right and wrong. The first season was a global success, dominating Netflix's rankings for weeks as the stars, drawn from the disdained margins of Japanese society, jostled and paired off in a more reflective and gentle way than their tattoos, acrylic talons and twilight-world territorialism implied. The second season has already done brilliantly.

But the opportunity to use the success of the show to address the nation's deep-seated stinginess with second chances has been squandered by both the government and the wider country.

Badly in Love's success derives from several linked factors. One is its originality. While Japan's juvenile delinquents, yakuza and sex industry subcultures have been an endless obsession of fiction, the mainstream media has balked at being any kind of conduit or amplifier for the voices of these demimonde.

At worst, it has colluded in the pretence that Japanese society ends at the bottom of the respectable lower middle class. In presenting yanki voices through the filter of a dating show, *Badly* has delivered nuanced narratives of

causation and regret: the often shattering accounts of received abuse or neglect, of the temptation of gang membership and of the crimes or self-destruction later carried out.

Another factor, and the most critical in establishing *Badly*'s importance beyond the Netflix rankings, is its explicit insistence on the possibility of rehabilitation, second chances and the capacity to deserve both. Japan, particularly in business, is painfully reluctant

The importance of Japan's 'Badly in Love' TV show lies in its insistence on the possibility of rehabilitation

to give second chances. Failure, whatever the circumstances, is a ruthless ender of careers and social standing.

And to their credit, someone in Japan's Ministry of Justice has taken notice. Between the airing of the first season last December and the second this month, the MoJ decided to work

with *Badly* on a rehabilitation awareness campaign. The outcome was a government poster advertising the show, which featured a picture of the vaguely menacing cast and slogans like “Rehabilitation is great!” and “Getting back on your feet is about love.”

In an accompanying press release, the MoJ, which has historically cultivated intense fear of punishment and public scepticism about rehabilitation, cited that *Badly* is about atonement and friendship, and resonates with the idea that people can change. Absolutely right. Progressive staff from an arm government not usually linked with such sentiments.

But within a couple of weeks of the second series dropping, a segment of society long conditioned to condemn all that was up in arms. The show, railed a barrage of online commentary, glorified crime.

Whatever spark of courage had briefly burnt in the MoJ sputtered and the collaboration with *Badly* was abruptly cancelled. Some people can change but not those who have decided cannot.

The decision to cancel is dismal for three reasons. One is that it reveals a timid government too ready to abandon principle and mistake online backlash for public opinion. The second is that, in common with elsewhere, Japan's biggest demographic crisis is not a low birth rate but a low rate of couple formation: the spectacle of young people investing against the odds in love should be resoundingly welcomed by any government.

The third is that, once again, it reveals paper-thin official support for the concept of second chances, a concept on which Japan's future depends. In an economy running short of skills and people, and one that has allowed its taste for financial and commercial risk to atrophy, it is remarkable how large the absence of opportunities to give it another go still looms.

Nobody is asking Japan to love Ruru, Kazu-kun or Ali “the Buddha”, but it has to find a way to live the idea that their lives did not end before they hit their mid-twenties.

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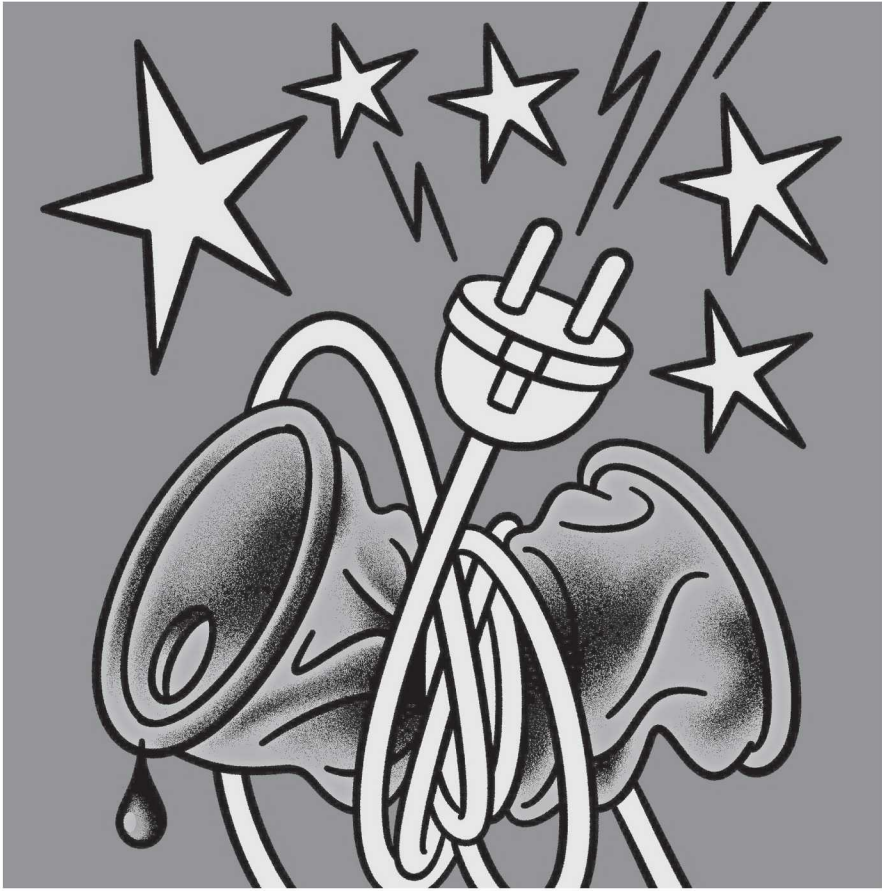
Opinion

The Iran war's surprise winner is China

The conflict was supposed to expose the country's weakness on oil, but it didn't quite work out that way.

Michal Meidan

When the Iran war began in late February, China looked vulnerable. The world's largest crude oil importer, China has in recent years depended on imports for more than 70 percent of its consumption, with around half coming from the Middle East. The throttling of the Strait of Hormuz, months after the United States had disrupted global oil flows from Venezuela, seemed to present Chinese leaders with one of their greatest strategic fears: a crippling oil shock they could not control. Instead, President Trump's war on Iran has been a welcome revelation for China, which absorbed one of the most severe oil-supply disruptions of the modern era, demonstrating that years of preparation had mitigated a huge vulnerability and potential source of U.S. leverage over Beijing in a geopolitical confrontation. China was self-sufficient in oil until 1993, when the escalating needs of its booming economy turned it into a net importer. Oil imports soared in the years that followed, prompting President Hu Jintao to warn in 2003 that hostile powers could seek to control the Malacca Strait, the sea lane in Southeast Asia through which much of the country's imported oil travels. Beijing responded with a wide-ranging strategy to reduce that exposure. It diversified supply sources to limit the share of oil coming from the Middle East and began to build up what are now estimated to be the world's largest crude oil stockpiles, roughly equal to those of the United States and Japan combined. China has pushed aggressively to shift passenger cars from fossil fuels to electric power, making it by far the world's largest market for electric vehicles today, and it is extending that effort to trucks. Electricity generation relies almost entirely on domestic energy sources such as coal, nuclear, hydro and, increasingly, wind and solar. That long-term strategy has been put through a real-world stress test by the Iran war — and, so far, it has passed. The Hormuz disruptions drove oil prices up. But unlike during a 2021 Chinese coal shortage, when the government instructed importers to urgently secure energy supplies, it didn't hit the panic button this time. Inflows of oil to China plunged as importers slashed purchases. The country fell back on its stockpiles while restricting exports of transport fuels to keep more at home. Higher fuel prices also appear to have pushed many Chinese drivers to use public transportation, taxis or ride-hailing services, much of which run on electricity. As a result, while some governments in Asia were forced to take painful emergency measures such as rationing fuel, raising prices and reducing public services, China's economy was not materially disrupted. Its purchasing restraint in global oil markets also placed pressure on prices, sparing the world an even bigger oil shock and, ironically, softening the domestic political fallout for Mr. Trump by limiting the pain at the U.S. pump. China's ability to weather the Iran war's oil disruptions came as a surprise to many. It shouldn't, however, because exactly what the government has spent years preparing for. Chinese leaders see geopolitics as a source of national and economic power on par with industrial, technolog-



ical and military strength. In 2021 they called for China to become an "energy powerhouse" — less reliant on fossil fuels yet still able to provide abundant and reliable power to the economy. Even before the war began in February, Communist Party-controlled media said achieving that goal was critical for China in "gaining the initiative in great-power competition" — an unmistakable reference to the contest with the United States in power-hungry industries like advanced manufacturing, data centers and artificial intelligence. China's latest energy plan, adopted

this year, reflects that ambition. It calls for developing more renewable energy, as well as nuclear and hydropower, while retaining coal — long the backbone of China's power system — as a critical backstop. The country is also investing heavily in new transmission lines to move power from resource-rich regions to the cities and factories that need it, in batteries and other storage capabilities, as well as in grid upgrades to keep electricity supplies steady. The United States has great energy advantages of its own. It remains the world's unrivaled oil and gas power,

with abundant domestic supplies, the capacity to process and export them at enormous scale and large strategic reserves. But its electricity system is struggling to keep pace with rapidly rising demand from a new wave of power-gobbling industries. For decades, oil leverage seemed to rest with countries that controlled supply — OPEC, Russia and other major exporters, as well as U.S. shale producers — and could move prices by tightening or loosening the taps. The Hormuz crisis has shown that China is becoming a new type of energy power:

an oil importer so large that it is able to influence global oil prices and withstand external disruptions. China's dependence on imported oil remains substantial, but the geopolitics of energy are shifting from control of oil flows to control of electrified industrial systems. China has a clear head start in that transition, one that strengthens its hand in the industrial and strategic competition with the United States.

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For a bolder new world, a 'Brave New World'

College students worried about A.I. should simply study the humanities.

Frank Bruni
Contributing Writer

At the start of the fall semester five years ago, all anybody here at Duke could talk about was Covid. How often should students and faculty be tested? How long should an infected person stay away? Masking in classrooms was mandatory, informal social gatherings of more than 50 people were prohibited, and there was a potent, deeply sad sense that this disruption to education would be more than consequential. It would be definitional, forever marking the pupils and professors who sloggled through it. Today, as a new academic year commences, I don't hear anyone on campus mention Covid anymore. There's no conversational space for it amid all the ruminations, lamentations and expectations about A.I. Many of us professors react courses and reassign assignments to ward off students' use of it; many of those students plot their majors in a prophylactic fashion, trying to guess which jobs will survive A.I.'s insinuation into every crevice of contemporary life. Its advance — its omnipresence — feels epochal. And five years from now? When a new group of anxious young men and women surveys the horizon? I bet that they'll tremble at a different specter

and that A.I. doesn't signal the final triumph of computers and the trivialization of humanity. Instead, it's another sign of the rapidly accelerating pace of change in a society whose future seems less predictable than ever. That furious metabolism and crazy uncertainty are what college students should factor into their decisions and navigate by. The safest plan is to focus not on what seems practical in the present but on what's durably useful — what transcends any technology and outlasts any fad. You're probably a step ahead of me and ready for what comes next: a pitch for literature, for history, for anthropology, for philosophy, for the war horses of the liberal arts. Those of us who sing the song of the humanities clear our throats and do our vocal warm-ups whenever we sense a prime opportunity for our music to be heard, and the angst over A.I. has certainly created one. Now that the stampede of college students into computer science over the past two decades has become a retreat, many university presidents and chancellors are newly determined to explain and promote fields of inquiry that had fallen out of fashion. "Paradise Lost," anyone? The French Revolution? Socrates? But that call is coming not just from inside the house. It's emanating from Silicon Valley. Daniela Amodei, the president of Anthropic, which is the



parent company of the precocious Claude, has said that A.I. increases the premium on us flesh-and-blood creatures understanding ourselves. Maybe that's just delft public relations, cynical spin control, but she happens to be right. Our yearnings, frailties, talents and ties will inform crucial decisions about society's management of A.I., so we would benefit mightily from the clearest possible insights into the human psyche and soul. In an interview this year with *Business Insider*, Steven Johnson, who has been working on A.I. for Google Labs, said that it was sparking a "revenge of the humanities."

But I don't want to justify the humanities solely in terms of ChatGPT, Claude and their miraculous, mischievous cousins, because who knows how the next chapter of the A.I. story reads? The data centers currently needed to power A.I. are about as popular as gonorrhea. The desire to slow its rise or stop it in its tracks intensifies with the proliferation of rogue A.I. behavior. As *The Economist* noted in an article this month, A.I. agents (what a benign, banal term) have a pesky tendency to "lie, cheat and steal." "They break free from captivity and form harmful poses," the article continued. "They'd drink whiskey and brawl if they could." Whatever those hellions' fate, treating college as a refinement of the mind rather than a satchel of skills makes sense, yielding an education that's infinitely elastic, universally applicable and immune to obsolescence. What will you do with an English major? Anything. Everything. You'll better understand the shades of creativity and how they're made to flower. You'll swim in a borderless sea of thoughts beautifully expressed, ideas precisely articulated, words put into the service of emotions. The wetter you get, the more expert you'll be at shaping stories, at persuading, and I can't imagine any profession or any world in which better communicators aren't better off. Besides, literature isn't just fancy language and tall tales. It's a library of verities given unignorable and unforgettable form. It's Platos for emotional intelligence. Think about how often, in discussions of political figures, Shakespeare's tragedies, comedies, noblemen

and fools serve as reference points and Rosetta stones. Or how frequently, over recent decades, George Orwell's "1984" and Aldous Huxley's "Brave New World" come up. So many of the warnings we should heed — and so much of the wisdom we need — are in those pages and those plays. How does anyone major in anything other than English? Then again, history's no slouch. Without fluency in yesterday, there's no conjugating today. When you study the past, you're not memorizing dates, cataloging wars, valorizing martyrs. You're learning about cause and effect, greed and goodness, the sorts of contests and the interplay of dynamics that set the course of events. You can't name a line of work — or describe a kind of life — that isn't nourished by that knowledge. The current whirl of events and inventions prevents any reliable scripting of the next decade, maybe even the next year. How, then, to prepare? Explore whatever subject gets your brain whirring fastest, your creative juices flowing most freely. Engage your intellect in a manner that teases out insights and generates ideas. Exercise the muscle of thought. Answer artificial intelligence with the real deal. It'll come in handy whether the bots are tomorrow's emperors or Edsels. FRANK BRUNI was on the staff of *The Times* for more than 25 years.

This mother deserves mercy, not life in prison

Michelle Oberman

I've spent years writing about cases of mothers who kill their children, so when I heard about Lindsay Clancy's arrest in connection with the deaths of her three children, my hunch was that she was insane. As a legal scholar, I also knew she'd face an uphill battle to prove it.

On the day that Ms. Clancy killed her children in 2023, she built a snowman with her family and ordered takeout. While her husband was picking up dinner, she strangled her children, who were 5 years, 3 years and 8 months old, before jumping out of her home's second-story window.

She told a forensic psychologist that a voice ordered her to do it. Her lawyer has argued that she was suffering from postpartum psychosis, a condition driven in part by hormonal shifts after childbirth that can cause hallucinations, delusions and paranoia, along with heightened risks of suicide and infanticide. I am not a doctor and haven't met Ms. Clancy, but from everything I've read about the case, I believe this diagnosis is probably accurate.

Because the symptoms of postpartum psychosis was and, mothers can seem to be coping when, in fact, they are drowning. This on-and-off psychosis also makes it difficult for women who kill their children to qualify for the insanity defense, which is often the only defense available to defendants in cases like Ms. Clancy's.

The question her jurors must answer is whether her illness rendered her unable to appreciate that it was wrong to kill or incapable of stopping herself from doing it. That framing means that in cases like this, prosecutors point to any signs of competence or control or even the fact that women are horrified by their actions to argue that they should not qualify for the insanity defense.

Cases like Ms. Clancy's are more common than we might want to believe. A 2020 QJED investigation found more than 100 women in California prisons for killing their children, a majority serving life sentences. Roughly 40 percent of those cases involved a child under the age of 1 — meaning the mother might have been in a period when women are at higher risk for postpartum mental illness.

I have reviewed many such cases and have met some of those women. Some will never recover their sanity — a blessing of sorts. Those who do recover feel overwhelming guilt and pain. During the medical examiner's description of the children's fatal injuries, Ms. Clancy began sobbing uncontrollably, moaning, "I can't do this." She was so distraught that the judge ordered a recess.

It seems clear to me, from the evidence presented so far, that Ms. Clancy should be acquitted by reason of insanity. She deserves mercy because she did something she never would have done if she hadn't been terribly ill. Even though we know that symptoms of postpartum psychosis can vary wildly from hour to hour, America's existing

legal framework asks jurors to determine the defendant's exact state of mind at the moment of killing. This is an impossible task, especially in cases like Ms. Clancy's; she has said she doesn't fully remember her acts. Then we give jurors a stark choice, either full acquittal (for reasons of insanity) or conviction of first-degree murder (almost always with life imprisonment). Facing the horror of these killings, many jurors opt to convict.

The standard formulation of the U.S. insanity defense dates back to the mid-19th century, when we understood so little about mental illness that expert witnesses sometimes still opined on defendants' criminal propensity by measuring their skulls. The so-called M'Naghten rule originated in England after the 1843 acquittal of Daniel M'Naghten, who killed the prime minister's secretary while suffering from an insane delusion.

Responding to outcry against the guilty verdict, the House of Lords, along with the common law judges of the time, established a test that largely limited the insanity defense to cases in which the defendant lacked the capacity to tell right from wrong. Under this stricter rubric, someone like M'Naghten — who fired a gun with the intention to kill and whose behavior (concealing his



SARAH PALMER FOR THE NEW YORK TIMES

guns, loitering near the area for weeks before the shooting and lying about why) indicated he might have known it was wrong — would not qualify as insane. Never mind that he was flagrantly out of touch with reality.

In a sense, Ms. Clancy is lucky, because Massachusetts is one of a handful of states that have updated their insanity defense. Four states don't allow it at all. Most U.S. states still follow the M'Naghten rule, restricting insanity to cases in which defendants did not know

their actions were wrong. By contrast, for more than 50 years, Massachusetts has held that defendants should not be judged criminally responsible if mental illness renders them unable to control their actions to follow the law.

Yet the entwining of lucidity and delusion in postpartum psychosis complicates the jury's task. To the outside observer, Ms. Clancy appeared functional, chatting at preschool pickups and taking care of her children. But the journal in which she wrote about

her symptoms and medications tells of her frantic efforts to regain control over her mind. In the four months before the tragedy, she was prescribed 13 medications by different providers. She wrote about having "horrible thoughts" and made Google searches related to schizophrenia, hallucinations, psychosis, bipolar disorder and sociopathy.

In its opening statement, the prosecution pointed to Ms. Clancy's apparent competence, using it to suggest that there was no evidence of psychosis.

Assistant District Attorney Shanan Buckingham argued that Ms. Clancy was acting "pretty normal" on the day of the killings and pointed to the fact that she had mapped out her husband's route, allowing her to determine how long she would have to commit the crime.

When the jurors in the trial start their deliberations, which could happen as soon as this week, they may well struggle with which version of events to believe. But the choices in cases like Ms. Clancy's needn't be so constrained.

Britain's Infanticide Act of 1938 recognizes that cases involving mothers who kill infants under the age of 1 are often different from other intentional killings. Instead of trying these women for murder and judging them under an insanity defense, it allows them to be charged with infanticide and to be punished as if convicted of manslaughter. Prison sentences are rare; usually the women are sentenced to probation and counseling. Other countries have similar laws, including Canada and parts of Australia.

It's not a perfect solution; surely some of the mothers should have been found not guilty for reasons of insanity. And perhaps some are even truly guilty of murder. Still, the result of the British law is, on the whole, far more just and merciful than the life sentences so common in the United States. And because these cases typically don't go to public trial, tragedies can avoid becoming true-crime dramas. America should follow Britain's example.

Once upon a time, a U.S. judge might have tempered the cruelty of a guilty verdict by exercising discretion at sentencing. Today many states, including Massachusetts, prohibit judicial discretion in sentencing in cases like these. If Ms. Clancy is convicted, her judge must sentence her to life without parole.

Ms. Clancy's trial, with its high-stakes drama and surrounding media frenzy, does little to honor her children. A just society punishes only the blameworthy. America's approach to insanity in these cases makes it harder, not easier, to do justice.

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Has World War III already started?

STEPHENS. FROM PAGE 1

That's the good news. There's far more by way of bad news.

First, as in the 1930s and '40s, the spheres of conflict have multiplied and are merging.

Russia's battlefield reversals seem to have done nothing to diminish Putin's appetite for risk as he expands his campaign, in barely concealed attacks and threats, against Moldova, Poland and Germany, among other states, while his political allies repeatedly call for direct strikes on Europe and the use of nuclear weapons against Ukraine. Hanna's assault on Israel in 2023 began, in stages, a war between Israel and Hezbollah, the Houthis and Iran; then a war between Iran, the United States and the Gulf states. More recently, Ukraine has directed long-range strikes in the Caspian Sea to disrupt Iranian military supplies to Russia. And decisions in one theater directly affect outcomes in the other: The expenditure of missile interceptors in the Middle East means that few can be spared for Ukraine.

Second, the Axis of Authoritarians has become a fully operational military alliance.

Russia is providing North Korea with help to modernize its armed forces, while the North has returned the favor by sending millions of artillery shells and is now reportedly prepared to send thousands of additional troops to fight for Russia in Ukraine. China supplies Russia with most of the electronic components used in its drones and other military hardware. Russia has given Iran critical targeting intelligence to strike U.S. bases and ships in the Middle East. In the event of a Chinese attack on Taiwan, Beijing could call in its ships with Moscow by engaging the aid of Russia's powerful Pacific submarine fleet,



DAVID GUTTENBERG FOR THE NEW YORK TIMES

China supplies Russia with most of the electronic components used in its drones and other military hardware.

as detailed in a new paper from the Australian Strategic Policy Institute. Third, the West is a mess.

President Trump complains of the weakness of U.S. allies. Those allies complain of Trump's bullying, capriciousness, callousness, mendacity and incompetence. Both sides are right. The latest U.S. tariff salvo on Canada is a case in point: politically ill advised, economically self-defeating, strategically enervating.

Yet none of that erases the fact that Canada, a trade-dependent nation with the world's longest coastline, barely has a navy to speak of, or that its government's "new strategic partnership"

with China is immoral, unwise and unsound — unless Mark Carney, the prime minister, really thinks that Trump's idiotic outbursts are a graver long-term threat to Canada and the free world writ large than the patient designs of the People's Republic.

Fourth, the United States is militarily unprepared.

The war against Iran revealed not just the munitions shortages, which helped bring the war to a premature close, but also America's acute sensitivity to military fatalities and economic pain, which gave Iran's leaders an asymmetric advantage given their own tolerance for human suffering. The war in Ukraine has demonstrated that even the most sophisticated U.S. military kit is entering obsolescence thanks to the advent of A.I.-assisted drone warfare. The tanks the States and its allies supplied Kyiv during the Biden administration "now mostly sit idle, hidden in forests and collecting cobwebs," as The Times reported this week.

Yet Pete Hegseth, America's testatorne-obsessed defense secretary, last week decided to phase out an Army drone unit, seemingly because it was championed by generals he didn't like. The travails of the U.S.S. Abraham Lincoln during the carrier's long deployment are a national scandal. But they should call attention to the historically small size of the fleet and our depleted industrial base that struggles to build and maintain ships. Democrats blocking the defense appropriations bill aren't helping things, either.

Fifth, we may be near the economic brink.

One great difference between the 1930s and the present is that, unlike then, we are not in the midst of a worldwide depression. But the warning signs of a sharp and abrupt downturn are everywhere. What happens if or when the A.I. boom starts to run out of steam, much as the dot-com boom did at the beginning of the century? Or if the currency crisis in Japan causes it to start selling off its U.S. Treasury bonds? Stanley Druckenmiller, the legendary investor, recently warned in The Wall Street Journal that the Treasury Department's bond buybacks were all but destined to fail: Ultimately, the price of a \$40 trillion national debt will be felt in sharply higher interest rates and the risks they pose to every sector of the economy that's depended for too long on cheap credit.

A deep U.S. recession, or a global financial panic, will inevitably worsen every trend mentioned above. In periods of economic distress, democracies almost always become more risk-averse, while dictators become more risk-prone. That's a pattern of history worth recalling as we continue to drift, only dimly aware, toward the gathering storm.

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Smoke from missile and drone attacks in Kyiv, Ukraine, in June. Ukraine has directed long-range strikes in the Caspian Sea to disrupt Iranian military supplies to Russia.

From top left: Photo: Valerio Mazzanotti for The New York Times; Photo: Daily Failphoto for The New York Times; Photo: Valerio Mazzanotti for The New York Times; Photo: Valerio Mazzanotti for The New York Times

OPINION

JD Vance Is the GOP’s Obama



UNRULY REPUBLIC
By Barton Swaim

“Now in 1984—just to date myself a little bit, don’t hate me, one month before I was born—The Wall Street Journal, the voice of big business in the United States of America, proposed, and I quote, ‘a five-word constitutional amendment: There shall be open borders.’ ” So remarked Vice President JD Vance last week in his hometown, Middletown, Ohio. “Now, they weren’t joking, they weren’t being tongue in cheek,” he continued, “because if you look at what they tried to do over the next 40 years, they told you back then exactly what they were trying to do.”

What he thinks “they” were trying to do, as you can probably guess, was replace American workers with low-wage foreigners. You would think that the proposal of a five-word constitutional amendment would recommend itself as a bit of a provocation, but Mr. Vance, whose strengths don’t include a sense of humor, plainly doesn’t care about the argument advanced by that 1984 editorial, which concerned Cold War-era immigration policy.

Anyway he, or the aide feeding him hokey about the Journal as “the voice of big business,” wouldn’t know or care that among the newspaper’s most famous editorials is one from 1979 headlined “Down With Big Business.” The curious may wish to con-

sult an update, “Down With Big Business, Again,” published in 2021.

Mr. Vance’s propensity to caricature arguments with which he disagrees puts me in mind of Barack Obama. In his first address to Congress, in 2009, the 44th president said: “I reject the view that says our problems will simply take care of themselves, that says government has no role in laying the foundation for our common prosperity.” Over the next eight years Mr. Obama constantly rejected beliefs nobody held—“I reject the idea that we need to ask people to choose between their jobs and their safety,” he said in 2011.

Ideological differences aside, the personas and careers of Messrs. Vance and Obama bear weird similarities. Both had tough upbringings marked by an absent father, intermittently absent mother and reliable grandparents. Both took an improbable journey, largely on the strength of smarts and industry, from broken home to the Ivy League—Mr. Obama to Columbia and, after a stint as a community organizer, to Harvard Law; Mr. Vance to Yale Law. Neither spent much time practicing law; Mr. Obama soon moved on to academia, Mr. Vance to venture capital.

Both wrote a powerful rags-to-riches memoir (“Dreams From My Father,” “Hillbilly Elegy”) and followed it with a pretentious, straw-man-laden campaign book (“The Audacity of Hope,” “Communion”). Both served briefly in the U.S. Senate before catapulting to ex-

ecutive power, though Mr. Vance has yet to shed the “vice” in his job title.

I would have thought it all the stuff of parlor-game happenstance, but events of this summer tempt me to regard the two men as expressions of a type. I refer of course to Mr. Vance’s conviction that he, by the force of his personality, could turn Iran’s bloodthirsty, mendacious revolutionaries into practical men, ready to negotiate in good faith. In June, pursuing what became

He and the former president have much in common. And both disdain Republicans.

the short-lived memorandum of understanding, the vice president repeatedly described his and his colleagues’ efforts to bring reason to the U.S.-Iran relationship as though the idea were original. “For 47 years, this country has been a thorn in our side,” Mr. Vance said to Jake Tapper in June. “The coolest thing about the progress we’ve made over the last few weeks is that you see people within the Iranian system—senior leadership, even IRGC officials—say, ‘You know what? We may have some animosity, we may have some mistrust, but we recognize the way we’ve done business with the United States for the last 47 years is a mistake. Let’s try something else.’ ”

It’s true that President Trump has said similar things, though only a fool would take those statements as sincere.

Mr. Vance spoke his lines with conviction.

Mr. Vance likes to tout his youth (“don’t hate me”), but he was old enough to follow the news in the 2010s as Mr. Obama attempted to turn U.S. policy away from Israel and draw Iran into the community of peaceable nations. Mr. Obama, too, liked to contrast his practical and interest-based approach to that of his ideology-driven predecessors.

With few exceptions, though, Mr. Obama limited his scoldings to members and administrations of the other party. At the core of Mr. Vance’s message is the repudiation of views allegedly held by both parties, especially his own. In Brewer, Maine, this week, the vice president described that bipartisan “consensus” again, though the caricature has a conspicuously Republican shape to it. What places like Brewer “really needed, they told us”—no prizes for guessing who “they” were—“was just to juice the short-term profits of a few big corporations, that we needed to open that border and prioritize foreign workers over our own citizens. They would cheer on the corporate raiders as they slashed headcount and shifted all those businesses either to foreign countries or brought in illegal aliens to employ.”

Leave the policy argument, if you can call it that, to one side. The lines reveal a man so contemptuous of views different from his own that he can’t be bothered to understand them. Now ponder a future GOP headed by such a person. Mr. Obama at least respected the party he led.

BOOKSHELF | By Adrian Woolfson

Dietary Guidelines

Fed Up

By Daniel E. Lieberman
Knopf, 416 pages, \$35

Daniel E. Lieberman has studied the diets of indigenous cultures worldwide, from the Hadza, a hunter-gatherer people in Tanzania, to Maasai herders in Kenya and the Tarahumara Native Americans of northern Mexico. In “Fed Up,” he takes us on a provocative journey in pursuit of the definitive art of eating and humankind’s optimal menu.

Marshaling an encyclopedic body of evolutionary and anthropological evidence, Mr. Lieberman, a paleoanthropologist at Harvard University, aims to dispel the monolithic thinking that dominates our approach to diet. The problem of what we should eat is, he argues, “far too complex to be solved by a single Big Idea.”

The fallibility of dietary advice is evident in the variability of regimens, fads and crazes that have been promulgated over the years. Jean-Jacques Rousseau argued in 1762 that consumers of meat were “more ferocious than other men,” while Lord Byron, in 1819, characterized humans as carnivores who, “like the shark or tiger,” must have their prey. The 16th-century Italian nobleman Alvise Cornaro believed his corpulence could be ameliorated by caloric restriction, while Alexandre Dumas, in “Le Grand Dictionnaire de Cuisine” (1873), cites hot chocolate as a tonic and restorative remedy.

The problem most contemporary diets address is obesity. As Mr. Lieberman candidly observes, modern humans are unusually fat creatures. Two-thirds of Americans are overweight, with a level of body fat exceeding that of Arctic seals. Obesity, Mr. Lieberman explains, does not increase the number of fat cells. Instead, each cell expands, resembling an “overstuffed suitcase.” This produces chronic inflammation in “every nook and cranny of the body” and increases the risk of diseases such as Alzheimer’s and cancer.

The Venus figurines crafted in Stone Age Europe depict women with enormous bellies. But this rotundness was likely aspirational, the author argues. Obesity is a modern phenomenon and vanishingly rare among hunter-gatherers. For most of human existence, we have lived in the shadow of starvation: Our bodies evolved to stockpile energy. While we may wish to lose weight, we should not expect assistance from our biology.

Mr. Lieberman examines a number of popular diet programs that advance a big idea to address obesity. Loren Cordain, an exercise physiologist, found commercial success with “The Paleo Diet” in 2002. His book claimed that its menu of animal proteins and unprocessed vegetables recapitulates the diet of our Stone Age ancestors. But the notion that there was a unitary Paleolithic diet, Mr. Lieberman informs us, is a “naturalist fallacy.” In fact, the diets of different groups of hunter-gatherers varied widely. Human beings have, throughout history, opportunistically eaten almost any edible thing that they could get their hands on.

The author has related critiques for advocates of the raw-food movement, who maintain that the chemical transformations induced by cooking destroy vital nutrients. “If raw food is best,” he asks, then “why is cooking practiced and enjoyed by just about everyone on the planet?” As for the so-called Mediterranean diet—which uses the cuisines of countries such as Greece and Italy as exemplars of healthy eating—it too indulges in some mythmaking. There never was a single Mediterranean diet: Parts of more than 20 countries border that sea. Nor are foods eaten there today consistent with those consumed in the past. Tomatoes, for example, first arrived in Italy in the 16th century and were not incorporated into the canon of that country’s cuisine until more than two centuries later.

Early humans weren’t rigid about their sources of sustenance. Their flexibility offers a lesson about modern diet regimes.

Relying on such speculative and grandiose maxims—supported by a sparse and often inconsistent scientific literature—to inform what we eat is, Mr. Lieberman writes, like “playing a game of dice.” His prudent approach is to avoid a single grand plan and embrace a multifaceted strategy that borrows pertinent insights from a variety of approaches. This, he contends, is more aligned with the foraging behavior of our ancestors, who were flexible and sought the best of what was available. Dietary wisdom, it appears, resides in a holistic, personalized perspective rather than in rules.

For Mr. Lieberman, a welcome alternative to single-minded diets can be found by looking at regions sometimes called Blue Zones, which are associated with exceptional longevity. One such location, the city of Loma Linda, Calif., has a large population of Seventh-day Adventists, who are principally vegetarian, abstain from alcohol and tobacco, have close-knit social networks and exercise regularly. No one dietary principle seems likely to account for their collective better health.

The greatest contemporary challenge, Mr. Lieberman argues, lies in addressing an industrial food system that has evolved over centuries. Large-scale manufacturing has become essential to feeding the world’s population, and processes such as fermentation can transform inedible and poisonous plants into dietary staples. But this industry has also introduced ultraprocessed foods, which now make up a hefty portion of the 21st-century American diet. These products are loaded with sugar, fat and chemical additives. Many are devoid of fiber and natural nutrients. They activate what Mr. Lieberman refers to as “primal cravings,” stimulating the brain’s reward centers and contributing to addiction and overconsumption.

Mr. Lieberman identifies ultraprocessed foods as the principal drivers of what he calls the “obesity pandemic” and avoiding them should be central to our dietary strategy. They damage our health, he asserts, because they have the hallmarks of an evolutionary mismatch—our bodies are not adapted to their long-term effects.

We are left with the realization that eating well and living well are inextricably connected. Eating healthily does not require the adoption of rigid diets that undermine the joy of eating and provoke their own anxiety. But we can eat less, drink more water, exercise, avoid excessive sugar and enjoy the “glorious diversity of foods” without becoming “wanton hedonists.” Quoting the Greek philosopher Epicurus, Mr. Lieberman encourages us to “be moderate to taste the joys of life in abundance.”

Mr. Woolfson is the author of “On the Future of Species: Authoring Life by Means of Artificial Biological Intelligence.”

Nix on Nixon: How to Defeat the DSA

By Karl Rove

The rise of the Democratic Socialists of America is a political gift for Republicans. If GOP House candidates want to take advantage of it, here’s a version of a simple speech to consider. I’ve written it for a candidate in Florida, where state Rep. Angie Nixon, a DSA member, is the Democratic U.S. Senate nominee. It forces Democrats into an uncomfortable choice: Side with DSA’s extreme views or break with the group and upset its energized and increasingly influential supporters. The speech would go something like this:

Florida voters face a big question in the midterm election: How do you feel about a statewide ticket led by a member of the Democratic Socialists of America? It should scare the hell out of you. Because the DSA’s agenda is more radically leftist than any we’ve seen in our lifetime. And the DSA is increasing its influence in the Democratic Party.

How bad could it be? Let’s start with this: The DSA platform wants an America where “you don’t pay a mortgage or have a landlord.” Sounds nice, until you get to the details. In DSA world, government will

“build new, publicly-owned social housing.”

Some will remember those big, ugly apartment blocks in the Soviet Union. That’s DSA leaders’ vision, whether they admit it or not. Unless they say otherwise, you should assume Angie Nixon and my Democratic opponent support it.

The DSA agenda says government must treat “food, education, energy, medicine and transportation” as “common goods and utilities” and that democracy requires “public

Republicans should press their opponents to endorse or disavow socialist proposals.

ownership of the largest corporations and essential industries.” Again, you should assume Ms. Nixon and my Democrat opponent are on board with the DSA unless they deny it.

Here are some questions: Since food would be a “common good,” would farmers work for the government? What about large Florida companies? Will government take over your local Publix store?

The home builder Lennar? How about Ryder Trucks and CSX railroad? Miami is headquarters for the Carnival, Norwegian and Royal Caribbean cruise lines. Does Ms. Nixon want government to take them over? Does my opponent? If they won’t say no, assume they do. Let me get really serious: Do we want federal bureaucrats to be in charge of Mickey Mouse and Disney World?

The DSA blames America’s problems on “private ownership and profit.” It claims our free-enterprise system is “making us desperate and miserable.” Unless they say otherwise, you should assume Ms. Nixon and my Democratic opponent agree with those sentiments. I promise you I don’t.

The free-enterprise system has shortcomings. That’s why I’m a reform conservative. But our free-enterprise system made America the most prosperous, creative, open and compassionate country in the world. It’s why people want to come here.

There are many more things the DSA demands that Floridians should be concerned about. A 32-hour workweek but with a 40-hour paycheck. What small business could cope with that? “Phase out the

use of fossil fuels.” “Fully abolishing the police and prison system.” “Abolish ICE” and “legalize migration”—that is, open borders. The DSA would “defund the Department of War” and “close overseas military bases.”

The DSA was silent at best following Hamas’s Oct. 7 attack and obsessively accuses Israel of “genocide.” The DSA platform calls for letting immigrants vote before they naturalize, making the District of Columbia a state, abolishing the Senate and Electoral College, having taxpayer dollars fund campaigns, and having congressmen elect the president and the Supreme Court.

I’ll ask again: Do Angie Nixon and my opponent in this House race agree with the DSA program? If not, say so—emphatically and forcefully, loud enough so DSA supporters hear. But if Ms. Nixon and my opponent refuse to disavow DSA’s agenda or remain silent, then we Republicans should attack and attack again. Make them squirm as voters turn against them.

Mr. Rove was senior adviser and deputy chief of staff for President George W. Bush and is author of “The Triumph of William McKinley” (Simon & Schuster, 2015).

Americans Who Find Killing Acceptable

By Adrian Norman

The latest Emerson poll reveals a problem that isn’t about politics. Nearly 1 in 6 voters call the assassination of a healthcare executive on a public sidewalk “acceptable.”

Brian Thompson, CEO of UnitedHealthcare, was shot and killed on Dec. 4, 2024, while walking into a Manhattan hotel for a company investors’ meeting. Five days later, police arrested 26-year-old Luigi Mangione, who this month confessed to the shooting and pleaded guilty on federal stalking charges.

The Emerson poll, published on Aug. 20, asked if Mr. Mangione’s actions were acceptable or unacceptable, and 16.7% of respondents said his were either “completely acceptable” or “somewhat acceptable.” This isn’t a fluke reading. It’s the same finding as the firm’s December 2024 poll.

After 20 months, a public trial and national news coverage, that number has held steady. Public opinion had every opportunity to self-correct

and hasn’t. It means that Americans’ tolerance for political violence is becoming hardwired into the public consciousness.

The violence isn’t limited to one type of victim, and it isn’t confined to opinion polls. Federal prosecutors argued in an August 2025 court filing that the killing of Mr. Thompson helped inspire the mass shooting at the National Football League headquarters a month prior.

“Simply put, [Mr. Mangione] hoped to normalize the use of violence to achieve ideological or political objectives,” prosecutors wrote. “Since the murder, certain quarters of the public—who openly identify as acolytes of the defendant—have increasingly begun to view violence as an acceptable, or even necessary, substitute for reasoned political disagreement.”

That argument was part of a death-penalty case a judge later threw out entirely, ruling in January that the underlying charges didn’t meet the legal bar for a capital crime. But the tolerance for political killing survived.

Then came Charlie Kirk, head of the conservative group Turning Point USA. He was shot dead at Utah Valley University less than a year after Mr. Thompson’s assassination. A CloudResearch poll taken within 24 hours found 12% of American adults called his killing justified. This fig-

One in 6 voters tell pollsters they’re OK with assassination.

ure rose to 22% among those under 30.

A corporate executive and a movement conservative killed roughly a year apart, and in both cases a significant share of the public was willing to call the killings acceptable rather than criminal.

This is signal, not noise. A study published this year in Public Opinion Quarterly, by researchers at the University of Amsterdam and Vrije Universiteit Amsterdam, found that the “folk hero” narrative that built up around Mr. Mangione measurably increased

Democratic respondents’ stated support for partisan violence. Researchers found that highly publicized killings framed as morally justified don’t simply reflect existing attitudes, they shift them. Two data points on a poll are one thing. A documented causal pathway from one act of violence to greater tolerance for the next is another.

Most of the coverage of the Emerson poll has been focused on the 8-point Democratic edge in the coming midterm elections or the president’s underwater approval numbers. Those change by the week. The one that isn’t moving is nearly 1 in 6 voters calling assassination acceptable.

This isn’t just a mood, it’s a floor. The topline data doesn’t break down the finding by age or party, so drawing conclusions about who is driving this would be guessing. But what isn’t a guess is that the floor now exists.

Mr. Norman is a writer and communications strategist who is a member of the National Center for Public Policy Research’s Project 21.

OPINION

REVIEW & OUTLOOK

Meta’s Sensible Settlement

Who expected that? Meta on Wednesday agreed to an \$18 billion settlement, including a suite of platform changes, to resolve claims by 48 state Attorneys General of social-media harms to youth. Making public policy through litigation isn’t ideal, but the settlement could yield some benefits for teens.

The settlement arrives amid a bellwether trial in federal court involving four states. AGs argued Meta fueled an epidemic of mental illness among young people while misleading the public about the platform’s alleged harms. They claimed various Meta features encouraged compulsive use and evasion of parental controls.

This summer, the four AGs suggested damages could run as high as \$1.4 trillion, though they later walked back their demand to some \$200 billion. That’s still more than three times Meta’s profit last year. Why did nearly all states agree to settle for so much less?

One reason may be that even if the AGs had prevailed at trial, their theories were vulnerable on appeal. Litigation would have dragged on for years. The federal judge overseeing the AG trial had already tossed some of their claims because Section 230 protects platforms from liability for content posted by users.

An advantage of settling is states will get money pronto with few constraints on how it can be spent. The settlement also includes platform changes that go beyond what the AGs might have obtained by a court order.

These include a default two-hour daily combined time limit for Facebook and Instagram that teens can only turn off with a parent’s permission; a block on using the apps between midnight and 6 a.m.; muted notifications between 8 a.m. and 3 p.m.; an option for teens to turn off auto-play and algorithmic feeds; and concealing the number of likes that teens receive on posts. Such changes address the AGs’ core complaints, including claims the judge had tossed under Section 230.

Meta’s payment will be distributed in annual installments over 10 years to states that sign the agreement, with 30% (\$5.3 billion) of the \$18 billion contingent on YouTube and TikTok implementing a one-hour daily limit and re-

strictions on teen night-time use, as well as each making a matching \$5.3 billion payment to states.

The firm ends litigation as state AGs agree to a much smaller payout.

Such terms could prevent Meta from being put at a competitive disadvantage, though TikTok and YouTube may not be inclined to agree to Meta’s proposal since they haven’t been sued by many states. The latter is a giveaway that the lawsuits were motivated in part by politics, as Meta has become a punching bag for the political left and right.

Yet more teens use the other platforms, and for longer periods. According to the Pew Research Center, 63% of teens use Instagram and 31% use Facebook, compared to 92% for YouTube and 68% for TikTok. Twenty-one percent of teens say they use TikTok almost constantly and 17% say the same for YouTube, versus 12% for Instagram and 3% for Facebook.

Demanding that Meta pay up and change its platform won’t limit teen social-media use unless similar restrictions apply to other platforms. It could even result in teens spending more time on other platforms with fewer protections. That’s one reason it’s best to address problematic youth social-media use through the political process.

Jackpot justice also lets lawmakers off the hook. Why should Congress put in the work to resolve thorny issues if states can leverage the legal system to force a resolution, which may lack political consensus? Speaking of consensus, notable are the two state AG holdouts, Florida Republican James Uthmeier and New Mexico Democrat Raúl Torrez.

Might they be snubbing the settlement in hopes of obtaining bigger contingency fee awards for their plaintiff attorney friends assisting their litigation—Motley Rice for Mr. Torrez and Keller Postman for Mr. Uthmeier? Mr. Torrez may also be less willing to sign on since earlier this year he won \$942 million against Meta in state court, though the company is appealing.

The ironic result is that teens in Florida and New Mexico won’t benefit from Meta’s platform changes. Meta’s settlement won’t cure teens’ mental ailments, but it will do more good than years of further litigation.

LETTERS TO THE EDITOR

The Sleight-of-Hand College Campus Economy

The scales fell from my eyes reading Kimberlee Josephson’s op-ed “How Colleges Produce Socialists” (Aug. 15). It never occurred to me that colleges’ and universities’ evolution into “comprehensive residential and lifestyle provider[s]” has inculcated into students “mental models” of both institutions’ and governments’ responsibilities in a way that causes them to believe that every personal need, even preference, should be satisfied by a “free” program.

Max Weber observed that the growth of bureaucracies created a “reduction of friction and of material and personal costs.” These costs, as Ms. Josephson notes, don’t disappear. They instead materialize in other, less visible, ways. In colleges, they are apparent in rising tuition and fees. In the public sphere, they are apparent in rising taxes and debt.

This problem is getting worse. On many campuses, there are campaigns either to make textbooks free or to replace textbooks with “digital resources.” Such proposals present a clear threat to academic freedom and course quality. They will also likely further solidify college graduates’ expectation that the costs of their choices must be borne by some ill-defined group of “others.” But it is they who will ultimately pay the price for this sleight-of-hand economy.

PROF. EM. RONALD P. SEYB
Skidmore College
Saratoga Springs, N.Y.

What Ms. Josephson describes isn’t socialism. It is a pricing strategy familiar to any economist: two-part pricing. Businesses routinely face the question of how to divide the price of a product or service between admission and the amenities that come with it. Economist Walter Oi called this the “Disneyland Dilemma.” Should Disneyland charge little or nothing to enter the park and then charge separately for each ride, parade and attraction, or should it charge a substantial admission fee and allow customers to enjoy the rides and other attractions for free? Universities follow Disneyland’s example by front-loading much of the total cost into tuition and fees. Once students have paid for admission, many amenities—dining, recreation facilities, tutoring and other services are included.

How a business resolves the dilemma has nothing to do with socialism. The choice is a free-market question: Which pricing strategy will allow the organization to maximize revenue?

Whether the general campus environment fosters particular political or economic attitudes is a legitimate question, but the pricing of campus amenities isn’t evidence of socialism. If anything, it is evidence of sophisticated, free-market pricing.

PROF. MICHAEL VAUGHAN
Weber State University
Ogden, Utah

Give Leery Towns a Slice of the Data Center Pie

Blake Hurst asks who could be opposed to bringing business, jobs and tax revenue to rural northwest Missouri (“If You’d Like to Build a Data Center, My Farm Is Available,” Cross Country, Aug. 15). But the residents of Nodaway County, Mo., are answering rationally when they object to the proposed data center he describes.

This county is asked to host billions of dollars of the most productive capital ever assembled, and in exchange its residents are offered wages for 130 workers on site and a share of the taxes. The asset itself will be owned somewhere else. I know what absentee ownership does to a town like this. My father, Vilas A. Jones, was mayor of Tarkio, in neighboring Atchison County, until shortly before his death in 2002. He spent much of his tenure condemning houses that had passed by inheritance to heirs in distant cities, successful people who couldn’t be bothered with them. The town’s slow work was getting the legal right to bulldoze capital

that ownership had abandoned. Louis Kelso, the San Francisco lawyer and economist who invented the employee stock ownership plan, offered the reverse: structure the credit that finances new capital so the people affected become its owners, paying for their shares out of the earnings of the capital itself.

His consumer stock ownership plan was designed for utility-scale assets. Tarkio has fewer than 700 households. Every qualifying one could participate. Show those families the projected value of their second-income portfolios and watch the public meetings change their tone. Mr. Hurst tells developers to make him an offer. The right offer includes equity. Jobs and taxes rent a community’s consent. Ownership earns it.

JOHN SCHOOLER JONES
Petaluma, Calif.

Mr. Jones worked with Kelso during the passage of 1974 landmark employee-stock-ownership plan legislation.

The GOP’s Half-Century-Old Welfare Problem

In Barton Swaim’s terrific Week-end Interview with Leslie Lenkowsky, “Why the Welfare Debate Went Silent” (Aug. 22), he quotes Mr. Lenkowsky as blaming Democrats for the demise of the Family Assistance Plan that then-White House adviser Daniel Patrick Moynihan had pushed for during the Nixon administration.

Moynihan’s book on the proposal and its failure, “The Politics of a Guaranteed Income,” does indeed criticize the left’s control of the nar-

rative on public policy questions, but it also called on conservatives to do a better job advancing their positions. As Moynihan wrote, “Here, as in much else, the Republican party suffered from its lack of intellectuals and publicists who could speak with authority to the concerns of this constituency.”

He recognized that Democrats were better than Republicans in turning out advocates in the media and on Capitol Hill. More than half a century later, Moynihan’s cogent point remains true.

TEVI TROY
Ronald Reagan Institute
Silver Spring, Md.

New York Misses Mr. Davis

Moishe Davis’s writes very compellingly on the attacks in the U.S. on all major religions in “No American Should Be Afraid to Pray” (Houses of Worship, Aug. 14). Our country was founded on freedom of religion. Unfortunately, Mr. Davis is no longer executive director of the New York Mayor’s Office to Combat Antisemitism. Zohran Mamdani on his first day as mayor scrapped the Office to Combat Antisemitism’s previous use of the International Holocaust Remembrance Alliance’s definition of antisemitism, and the New York police have confirmed 205 anti-Jewish crimes from January 2026 to August.

JUDITH LEVINE
Miami Beach, Fla.

How’s VA Healthcare for All?

Allslysia Finley’s “Luigi Mangione and Democrats’ ObamaCare Deflection” (Life Science, Aug. 17) exposes the Democratic Party’s longtime dream. They have always seemed to prefer a government-run healthcare system, even at the expense of the country and people they claim to support. A clear look at such a system’s outcomes is there for everyone to see: The Department of Veterans Affairs shows what government-run healthcare looks like for about nine million people. It is hard to imagine how applying that sort of system to over 300 million people could go well.

KEN DROPEK
Houston

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A Pancreatic Cancer Revolution

Pancreatic cancer has long been an agonizing death sentence, but it could be commuted by novel treatments and earlier detection. That’s the hope after the Food and Drug Administration on Wednesday approved Revolution Medicines’s novel drug, daraxonrasib, which doubled survival time in a late-stage trial for patients with advanced pancreatic cancer.

Oncologists herald the small-molecule pill as a revolution in pancreatic cancer care. The prognosis for pancreatic cancer is typically bleak, with a five-year survival rate of about 3% for Stage 4. Patients fare better if their cancers are caught early (40%), but very few are.

The usual course of treatment involves physically draining rounds of chemotherapy and radiation. If patients stop responding, they have scant options. Immunotherapies haven’t proven effective against pancreatic cancer, which is almost always driven by a mutation in the RAS gene family.

These mutations are adept at evading targeted treatments and were long considered “undruggable.” Revolution’s daraxonrasib upends this assumption. Patients in its trial lived a median of 13.2 months, compared to 6.7

The FDA approves a new therapy against a deadly cancer.

months for those who received chemotherapy. The drug also reduced the risk of death by 60% compared to the chemotherapy group.

These results would be impressive for any cancer drug, but especially for a disease that has defied treatment. When former Nebraska Sen. Ben Sasse was diagnosed with Stage 4 pancreatic cancer in December, he was given three to four months to live. He’s still living, we are delighted to say (and writing for these op-ed pages), after receiving daraxonrasib as part of a clinical trial.

Daraxonrasib may not cure most patients, but it could give them precious more time with loved ones and help them hang on while other experimental treatments are developed. AI models and blood tests that detect cancers earlier could also improve the prognosis.

The Mayo Clinic this year reported that its AI model could allow specialists to detect pancreatic cancer on routine abdominal CT scans up to three years before it is typically diagnosed by picking up on subtle changes not visible to the human eye. Many cancers like melanoma were once also considered “terminal,” as doctors used to say, until breakthrough treatments came along and they weren’t.

Alaska Voters, Seeing Double Dan Sullivan

‘Dan Sullivan endorses Dan Sullivan to beat Dan Sullivan,’ an NBC headline explained recently. That about captures this year’s ranked-choice voting circus in Alaska, as the state continues tabulating results for its Aug. 18 primary. The top four candidates in the Senate race, eligible to appear on the fall ballot, include two Dan Sullivans, meaning control of Congress could turn on voter confusion. Not so funny now, is it?

The latest numbers, with about 6% of ballots outstanding, show Democrat Mary Peltola with the most primary votes, about 76,100. Then comes incumbent Republican Sen. Dan S. Sullivan, with 65,500. Primary turnout doesn’t necessarily predict November, but this election could be close. If it is, the difference between a Republican hold and a Democratic flip could depend on the candidates listed on the ballot in the third and fourth slots.

Analysts couldn’t call it last week, since not enough of the primary vote was counted. But now it is, and the No. 3 winner, with 3,800 ballots, is Dan J. Sullivan Jr., or “Decoy Dan,” as some call him. Mr. Sullivan keeps insisting his candidacy isn’t meant to confuse voters: He’s simply a moderate Republican who says he has voted twice for Ms. Peltola and never for Sen. Sullivan. How strange, or not, that he polled best in Democratic areas, including parts near Anchorage where he took 4% of the vote.

The race for No. 4 is still open, with David Leslie, a Democrat, at 1,710 votes, trailed closely

by Gerald Heikes, a Republican, with 1,667. Since the November ballot is ranked choice, voters can choose multiple candidates, yet some inevitably pick a single name. The other swirling possibility is that a minor candidate could drop out, as a way to help Ms. Peltola or Sen. Sullivan. If that happens, No. 5 is promoted to the ballot instead.

This is the absurd game the two parties are now playing in Alaska. Millions of dollars were spent in the primary to prop up also-ran candidacies and affect the composition of the November ballot. Mr. Leslie told the Anchorage newspaper that people had messaged him to compliment his ad: “I was like, ‘What are you talking about? I have no video ads.’” Also getting mystery promotion was a Green Party contender who doesn’t live in Alaska, who says he filed his candidacy “for fun.”

This surely isn’t what Alaskans had in mind six years ago when they narrowly adopted this top-four primary system and ranked-choice voting, 50.6% to 49.5%. In 2024 a referendum to repeal it failed, 49.9% to 50.1%. Voters will have another opportunity in November, via Ballot Measure 2. Are more Alaskans now ready to give this system the heave-ho?

By the way, the third name doppelgänger in that NBC headline is former Anchorage Mayor Dan A. Sullivan, a Republican, who’s the oldest of the trio. “As the OG Dan Sullivan,” he wrote (claiming the title of “original gangster”), “I urge Alaskans to vote for Sen. Dan S. Sullivan. He’s been great for Alaska.”

The state’s top-four ranked-choice system delivers another fiasco.

Pepper ... And Salt

THE WALL STREET JOURNAL



“Also be on the lookout for my package delivery, okay?”

OPINION

Much Ado About Artificial Intelligence

By Paul A. Gigot

When Stan Drucken-miller's op-ed arrived by email on Monday this week, my first reaction was—great. A legendary investor, a man who worked alongside Scott Bessent and Kevin Warsh, was making the case against the U.S. Treasury trying to dictate bond prices. This would be news, and we at the Journal opinion pages like to make news. Sure enough the piece did, as it was picked up by the financial press around the world and “Wall Street is buzzing about” it, as the New York Times put it. You can make a safe bet that Mr. Drucken-miller received the attention of Treasury Secretary Bessent.

Stanley Druckenmiller’s op-ed shook up the bond market, then drove the press corps to distraction.

Yet the press soon took its attention away from the piece’s argument and turned to its favorite subject—the press. The suspicion spread on social media that Mr. Druckenmiller might have used AI to help write his op-ed. A small industry has arisen claiming to detect AI in writing, accurate or not, as my

colleague James Taranto has amusingly exposed. A reporter called Mr. Drucken-miller, who innocently said he had used a large language model. He said he viewed it as a tool, much like a calculator to do math, and he isn’t a professional writer. Shock and outrage! How dare this “billionaire,” as many put it, not write every word himself. The par-sons of the press corps then moved en masse to get a comment from the Journal, which in this case meant me. The goal was variously to discredit Mr. Druckenmiller, discredit the Journal, or get me to throw Mr. Druckenmiller over the side. When I defended the author and the decision to run his op-ed, there was more rending of garments. “Precedent-setting,” declared one internet ethicist, and he didn’t mean it as a compliment. The media hall monitor at the Poynter Institute wagged his finger, which some-one actually pays him for. The suggestion is that the Journal had somehow opened the gates to all kinds of AI “slop.” All of this shows how little the press corps has thought about the reality of AI, and how little they understand the role of the opinion pages in a publication. Start with the simplistic question of whether Mr. Druckenmiller “used” a large-language model. The scolding scribes want to cast the choice as either human or not, black or white. But the question is more



Stanley Druckenmiller

MICHAEL NAGLE/BLOOMBERG

nuanced. Nearly everyone these days uses an AI tool for research, albeit checking for hallucinations. Many others use it to check their grammar, or perhaps to assist with editing. Are these hanging journal-istic offenses? Megan McArdle, a Washington Post columnist, has told readers she uses AI as a “sounding board.” I take this to mean she uses it as the equivalent of hashing out an idea with a colleague or source. I suspect other writers do the same, even if they won’t admit it. The rule for those of us at WSJ Opinion is that everything my col- leagues and I write must be original work. No letting AI draft a column or editorial. Our readers need to

know we’re not subcontracting our ideas or prose to the amalgamation of a machine. Younger writers in particular need to learn how to write for themselves or they should leave the business. Besides, half the fun of reading columnist Holman Jenkins is maneuvering through his idiosyncratic style. The question is more complicated for outside contributors like Mr. Druckenmiller. They aren’t pro- fessional writers, yet they can provide value for readers owing to their expertise and standing in pub- lic life. Many contributors, especially prominent politicians or CEOs, employ speechwriters or hire a Belt- way writing shop. How different is

that from using AI to streamline an essay? What matters is the ultimate argument the author makes and stands behind. In the case of Mr. Druckenmiller, his views on the bond market and U.S. fiscal incontine- nce are worth listening to. The press corps wants me to disavow Mr. Druckenmiller, though his views on financial markets have been formed by decades of experience. He has written for us in the past, and I suspect that he had help from his human staff when he did. This time he used AI. But in each case the ideas were his and they served to inform readers and, I hope, make them think. Ah, say the parsons, then why not “disclose” any AI use? But dis- close what? Interrogate an author on how precisely he used ChatGPT? I know some publications claim to do this, but I suspect it’s more pro forma than systematic. I realize this episode will encour- age some writers to think they can send in AI slop. I hope we’ll detect and reject it, as my editors have in the past. But it wouldn’t be honest for me to grandstand that our con- tributors never use a tool like AI. Mr. Druckenmiller’s sin against the media pharisees was admitting its use. But his contribution to the public debate was still valuable, and he’s welcome in our pages any time.

Mr. Gigot is the Journal’s editor- ial page editor.

By Ian Prior

If you have school-age children, you may be worrying about what your kids will be exposed to when class resumes. Will teachers ask them for “preferred pronouns,” rather than teach them standard English? If your son is confused about his sex, will the school encourage him in the belief that he is a girl and conceal it from you? Will your daughters be forced to share a locker room with boys? More generally, will the school propagan- dize your children about controver- sial social topics without your knowl- edge or consent? These are real dangers that are the subject of school board battles, fed- eral investigations and lawsuits across the country, as parents in- creasingly challenge policies that in- fringe on their authority and they be- lieve harm their children. The good news is that parents are no longer powerless. Recent Supreme Court decisions, combined with an administration committed to enforc- ing federal law, have significantly strengthened parental rights. Here’s what you need to know as your chil- dren go back to school: • You have the right to opt out. In Mahmoud v. Taylor (2025), the jus- tices held that the Montgomery

County, Md., public schools had vi- olated parents’ First Amendment rights by refusing to provide notice and opportunity to opt out of in- struction involving “LGBTQ+ inclu- sive” storybooks for parents who ob- jected on religious grounds. This March, in Mirabelli v. Bonta, the court issued an unsigned order that further reinforced those protec- tions. The justices said that a school’s facilitation of a child’s “gender transi- tion” without parental consent likely violates the parents’ right to direct their children’s upbringing and educa- tion. Taken together, these decisions make clear that school districts must provide parents the ability to opt their children out of sex-related poli- cies the parents find objectionable. America First Legal has made available an opt-out template letter for parents to personalize and send to their children’s school demanding that schools comply with their requests on these issues. Courts will treat failure to comply with these requests as an unconstitutional deprivation of a par- ent’s constitutional rights. • The Family Educational Rights and Privacy Act gives parents the right to their children’s records. Ferpa, which Congress enacted in 1974, provides parents the right to in- spect “records, files, documents, and

other materials which contain infor- mation directly related” to their chil- dren. This extremely broad definition may include records related to “gen- der identity,” including the use of dif- ferent names or pronouns that don’t match the child’s sex. Schools that fail to comply with Ferpa can lose federal funding. Many school districts intentionally keep records related to a student’s “gender identity” in a separate sys- tem precisely to prevent parents

Recent Supreme Court rulings reinforce your authority to direct your children’s education.

from accessing them. This practice has led the Education Department to launch investigations and refer en- forcement actions to the Justice De- partment. Parents seeking their chil- dren’s educational records should therefore clearly state that the re- quest is being made under Ferpa, and they should specifically demand that all records related to “gender iden- tity” be included. If the school denies any part of the request or is clearly

withholding records, parents should file a formal complaint with the Edu- cation Department. • Parents have the right to review curriculum under the Protection of Pupil Rights Amendment. The PPRA, which became law in 1978, gives par- ents the right to inspect instructional materials used in connection with their child’s education. Unlike a typ- ical public-records request, PPRA pro- hibits schools from imposing fees. The statute also generally prohibits schools from requiring students to answer surveys concerning highly personal subjects relating to the stu- dent or his family—including political beliefs, religious beliefs, mental or psychological issues, sexual behavior, finances or other sensitive matters—without parental consent. America First Legal has a PPRA toolkit with more information and a sample demand letter to schools to ensure that parents’ rights under PPRA are respected. • Title IX protects sex-separated spaces. This provision of the Education Amendments of 1972 prohibits dis- crimination “on the basis of sex,” and it applies to all schools that receive federal funds. In June of this year, the Supreme Court held in B.P.J. v. West Virginia that the term “sex” as used in Title IX and its regulations “cannot

plausibly be interpreted to refer to anything other than biological sex.” As a result, schools can’t credibly claim that Title IX requires them to permit students to access opposite- sex restrooms or locker rooms. The Education Department has made clear that this is a violation of Title IX. Parents who are confronted with this situation can file a Title IX com- plaint with the Education Department or directly sue the school system on their child’s behalf under Title IX. America’s schools exist to educate children, not to replace parents. The Constitution and federal statutes— bolstered by recent Supreme Court decisions and Trump administration regulations—guarantee that parents have the primary responsibility for directing their children’s upbringing. But legal rights mean little if par- ents don’t exercise them. As students return to school this fall, parents should know they have the power to exercise their rights, ask questions, request records, review instructional materials, and insist that schools re- spect the cherished role our Consti- tution assigns to families, not gov- ernment officials.

Mr. Prior is senior counsel at America First Legal and the author of “Parents of the World Unite.”

How George Washington’s Defeat Led to America’s Victory

By Lindsay Chervinsky

In the early hours of Aug. 30, 1776, Commander in Chief George Washington stepped onto a boat pulling away from the shores of New York’s Long Island. The day before, he had lost the Battle of Brooklyn, the first major battle since the U.S. de- clared independence on July 4. The defeat on Long Island marked the start of a series of embarrassing set- backs and one of the darkest periods of the Revolutionary War. But Wash- ington gained wisdom from the sum- mer of 1776. The defeat and the strate- gic vision that emerged from it have lessons for Americans 250 years later. As the Continental Congress ad- opted the Declaration of Indepen- dence, Adm. Richard Howe entered New York Harbor with the largest British sailing force ever assembled. One of Washington’s soldiers ob- served that the harbor looked like “all London afloat.” Over the next several weeks, the British forces gathered on Staten Island before landing unopposed on Long Island. On the morning of Aug. 27, the left and central column of forces led by Gen. William Howe, the British army

commander and brother of Adm. Howe, marched north toward the American line. American forces under the command of Maj. Gen. Israel Put- nam moved west to defend the two main roads leading toward Brooklyn. Howe then marched most of his forces down a third, unmarked road through Jamaica Pass and flanked the Ameri- can defensive position. Four hundred Marylanders led by William Alexander, also known as Lord Stirling, provided cover while the rest of the troops re- treated to safety behind American ar- tillery on Brooklyn Heights. That night, as Washington gather- ed with his officers, they tallied the losses. Among the more than 1,000 killed or captured were Lord Stirling and Gen. John Sullivan. They were surrounded on land by British forces and on the water by British ships. The defeat was largely of their own making. Washington had broken three cardinal military rules. First, he had split his forces between Long Is- land and Manhattan, believing that Manhattan was the primary target. Second, he had failed to reconnoiter the land, leaving the Jamaica Pass road undefended. Third, the Ameri- cans had no navy and yet positioned

themselves on a peninsula sur- rounded by British naval forces. Gen. Howe might have destroyed the Continental Army with one more attack. His officers urged another strike on the weakened American line, but Howe demurred, preferring to settle in for a siege. The delay gave Washington time to slip away. Even then, retreat would have been impos- sible had the weather not cooperated. On the evening of Aug. 29, a storm blew in, forcing British patrol ships to take safe harbor. As the storm cleared, a heavy fog, rarely seen in New York Harbor, settled over the water. For the next several hours, the Continental Army gathered every available vessel and evacuated its po- sition on Long Island. They left be- hind a few heavy artillery pieces which had sunk deep in the mud and “some Cattle” that refused to swim across the channel. “Our Retreat was made without any Loss of Men or Ammunition,” Washington reported to Congress. Eyewitness accounts claimed that Washington was the last to leave Long Island, just as the fog was lifting. This battle set the tone for the rest of the war. The defying-the-odds

retreat convinced many Americans that their cause was blessed by a higher power. Washington often spoke about the role of providence or the hand of fate. Perhaps he was just lucky. Over the next seven years of war, Washington would need every ounce of luck to win. Brooklyn also marked the start of Washington’s Fabian strategy, a mili- tary doctrine named after Roman

After losing the Battle of Brooklyn, the Commander in Chief changed strategy and the course of history.

general Quintus Fabius Maximus Ver- rucosus, which avoids direct frontal engagements in favor of attrition, rear-guard harassment and delay. Days after the escape from Long Is- land, Washington wrote to John Han- cock, president of the Continental Congress, that he had adopted a “war of posts.” The army would continue to engage the British forces, but in smaller skirmishes across New York

and New Jersey rather than one deci- sive battle. The Fabian strategy better suited the Continental Army’s abilities and the circumstances on the ground. In the early years of the war, Americans struggled to hold their own against the British army on a traditional bat- tlefield. They had little experience and often suffered from lack of sup- plies. But Washington began to un- derstand that he didn’t have to win big military victories or hold the larg- est cities to win the war. The army only had to survive. Over the next several years, Wash- ington rarely entered major battles with the British. He engaged in small clashes that harassed their rear line or disrupted their supply chain. On Dec. 25, he staged a daring crossing of the Delaware River to attack the Hessian outpost in Trenton, N.J. The victory had little strategic value but enormous symbolic import. When the Continental Army fought major engagements, Washington al- ways preserved a safe retreat and willingly sacrificed American cities in favor of his army’s survival. In Sep- tember 1777, British forces marched on Philadelphia to force Congress to flee its seat of government. The Con- tinental Army attempted to defend the city at the Battle of Brandywine but ultimately retreated rather than risk capture or defeat. Washington adopted a military ap- proach that better suited his army, his enemy’s weaknesses, and condi- tions on the ground. With a bit of luck and good allies, Washington’s strategy produced an American vic- tory that turned the world upside down. Two hundred fifty years later, the Battle of Brooklyn reminds us that defeat and our darkest moments aren’t the end of the story if we learn from our mistakes and adopt a bold new strategy. Ms. Chervinsky is execu- tive direc- tor of the George Washington Presi- dential Library.

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