



Light on truth

No government intent on working for the people should fear transparency

Protests by political parties and transparency activists have derailed the surreptitious rollout, in Tamil Nadu, of a regressive decision to exempt the Public (Law and Order) Department from the purview of the Right to Information Act, 2005. On September 21, the State government issued a Government Order (G.O.) exercising powers under Section 24 (4) of the RTI Act to notify the department as an “intelligence and security organisation” to which the provisions of the Act shall not apply. While the G.O. surfaced in the public domain only on September 27, strikingly, the Public Department’s designated authorities under the RTI Act had instantly begun citing it to deny information to applicants as early as September 22. This betrayed a system that is shy of investing in transparency. Unsurprisingly, State Law Minister C.T.R. Nirmalkumar was initially defensive about the government’s unilateral decision, which, in any case, required the State to have it placed before the legislature (Section 24 (5), RTI Act). He claimed that the ambit of the exemption was not sweeping enough to shield the entire department, but was intended to prevent the sharing of sensitive information relating to district-level inquiries into incidents of communal clashes and the like. However, shortly thereafter, he announced the G.O.’s withdrawal, without explaining why.

While the State’s afterthought is welcome, the episode has again exposed the political class’s penchant for maintaining secrecy in administrative affairs. Chief Minister C. Joseph Vijay, whose promise of change came as a breath of fresh air, should have known better. It is concerning that the establishment desired to insulate itself from transparency by amending an Act which, in any case, emphatically enables non-disclosure of information through a long list of exemptions under Section 8. Even otherwise, designated information officers of central/State institutions have displayed an uncanny skill in being economical with the truth, delaying responses or bouncing off queries from RTI Act applicants, citing vague reasons. Besides, concerns about the Digital Personal Data Protection Act diluting the RTI Act further have been widely articulated. It is worrying that the Satrak Nagrik Sangathan’s 2024-25 report card on Information Commissions found a backlog of over 41,000 appeals and complaints before the Tamil Nadu State Information Commission (TNSIC), as of June last year. Yet, the TNSIC is functioning with only half of its sanctioned eight Information Commissioners and has no Chief Information Commissioner. Instead of seeking to defeat the intent of a piece of legislation enacted to empower citizens with access to information, the Tamil Nadu government would do well to strengthen the TNSIC. After all, only an administration that does not fear transparency can be the true harbinger of change.

Waves of rain

Odisha must prepare for repeated bouts of intense downpour

Odisha is experiencing one of its most intense monsoons, recording 1,453 mm of rainfall between June and September 25 this year, a 29% excess. The reason is the unusually large number of atmospheric systems, including 11 over the Bay of Bengal, the latest making landfall near Kalingapatnam on September 23. The IMD had forecast that India would receive 90% of the long-period average partly because an El Niño was expected to develop; the State had finished June itself with a 47% deficit. However, rainfall in the region came to be dominated by the weather systems, which also repeatedly delivered rain without giving locals time to recover. By the State’s estimates, 5.2 lakh people had been affected by July 30 and another 13.5 lakh by August 27. At least 60 locations have so far received more than 100 mm of rain in 24 hours, with the runoff swelling multiple rivers and threatening more floods downstream, including in Bhadrak and Jajpur, and landslides in hilly areas. When a previous bout of rain has already saturated the soil and topped local storage, a new bout could lead more immediately to runoff. While the State’s south is predominantly highland and confronts slope failure risks, its coast is a depositional plain of multiple deltas, rendering a terrain with low gradient through which water does not readily drain into the sea.

The efficacy of the State’s long-standing policy to have zero casualties remains to be seen, especially given the extent to which the ongoing season will stress the drain design and maintenance deficiencies that the CAG had flagged in 2024. Other important data include the eventual crop and infrastructure damage assessments and the peak levels of the Baitarani, Budhabalanga, Jalka, and Rushikulya rivers after the 11th system fades. A study in May by the Odisha University of Agriculture and Technology, based on data from 1901-2020, reported that both maximum one-day and five-day rainfall bursts were becoming more common even as the frequency of heavy-rain days was dipping. The State has been renowned for its disaster management protocols. However, the recurrent waterlogging in urban hubs such as Berhampur and the disruption of inter-State highways and rail networks suggest that its evacuation protocols outpace its civic engineering, with significant room to improve socio-economic and infrastructural resilience. Climate change is also increasingly correlated with more protracted monsoon withdrawal and intense rain events. Taken together, Odisha needs to pivot from anticipating isolated seasonal anomalies to preparing for repeated intense downpours.

It may be tempting to see the recent jerky resumption of negotiations between the Islamic Republic of Iran (IRI) and the United States as *déjà vu*. Similar attempts resulted in the June 17 Memorandum that unravelled within weeks, and the two belligerents resumed their respective blockades of the Strait of Hormuz and Iranian ports.

A different moment now

So, what is different this time? They have both realised that time is not on their side. Their respective domestic considerations make continuation of the seven-month-old war costly and unsustainable. In the short run, going by the past pattern, September 26 saw United States President Trump’s dismissal of Iran’s seven-point proposal, which may be an opening gambit seeking better terms and sequencing. While the Iranian initiative may betray their economic desperation, it also showcases their reasonableness to the Trump sceptics in America and the region who regard his “War of Choice” against Iran as ill-begotten.

The November 3 mid-term congressional elections could upend Mr. Trump as a lame duck. Iranian hardliners, too, need to exhaust this option to justify their aggressiveness. In the longer run, Mr. Trump needs to salvage his legacy to match his extravagant promises. Similarly, the Iranian theocrats need to keep Gen Z engaged and avoid regional blowback from the coagulating mistrust. Thus, while retaining their braggadocio about final victory, each needs to move away from its maximalist obduracy and seek a “Hudna” or temporary peace. The impact of the unfolding imbroglío on the two belligerents as well as on Israel and Gulf states must be examined.

Statistically, the U.S. has a quantitative premium and staying power *vis-à-vis* Iran: It has three times the population, 85 times the GDP and 20 times the military budget. Iran is also at a disadvantage in quality and modernity of weaponry, although its asymmetric strategy has blunted that edge. Washington has weaponised ‘Operation Economic Outcast’ against the already “maximum sanctioned” Iranian economy. Yet, the IRI has not “capitulated”, and the U.S. itself faces inflation, ammunition depletion and isolation. Battle asymmetry aside, their respective combat histories are relevant. The Iran war has been an outlier from the usual U.S. military doctrine of battle dominance through “shock-and-awe”, tech superiority, and leveraging its global primacy through the global politico-financial architecture. The last battle that the U.S. fought as an underdog was its war of independence nearly 250 years ago, and hubris haunts it now. In contrast, Iranians have often been the underdogs to Greeks, Byzantines, Arabs and Ottomans. More recently, British and American manipulation for oil, and Iraq’s 1980 invasion of a fledgling IRI, still frame Iranian



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Retired Indian Ambassador, specialising in West Asian and oil issues

Both Tehran and Washington must hear the bells toll as mistrust grows and global economies falter

political discourse. Their Shia sect being a minority among the Sunni Muslims reinforces their sense of virtues in suffering and martyrdom. The legacy has made the IRI more determined to face enemies with grit, guile and gumption.

The political ecosystem in Iran is hardened, with dissent stifled and externalised to demonised America and Israel as the two Satans. Mr. Trump has been less successful in getting Americans and the allies abroad behind his trenchant anti-Iran rhetoric. This is partly due to his divisiveness, lack of coherent endgame strategy and inability to protect his allies’ security and economy. Triggering a decapitating war that ignored Iranian politico-military resilience and retaliatory capacity was a strategic blunder. It risked the closure of the two vital maritime choke points, rising hydrocarbon prices, and threatened to push American “hyperpower” into a forever conflict against a middle-ranked, but determined, Iran. Similarly, his recent strategy of inflicting economic pain on Iranians may also fail by making them rally around the flag. Occasional tanker attacks and the ongoing Yemen-Saudi scrimmage notwithstanding, seven months on, the two belligerents are currently licking their wounds.

Uncertain path ahead

Two formidable unknowns loom before some educated projections can be made about the U.S.-Iran conundrum. First, although the Iranian seven-point proposal is based on the June 17 Islamabad memorandum, its precise contents are foggy. Second, the failure of the Islamabad memorandum, subsequent tit-for-tat attacks, the U.S. blockade, Operation Economic Outcast and fire-eating rhetoric since June 17 have deepened mutual mistrust, raising the bar for the *modus vivendi* required for a peace deal. These negatives are balanced by awareness that the continued stalemate would lead to a shared perdition of a hostile Congress blockading Mr. Trump and anti-establishment demonstrations pulling the rug under the Mullahs.

Under a positive scenario, both sides can breathe easier and develop greater mutual empathy. Failure of the June 17 Grand Bargain would have presumably made them more realistic and incremental. So, instead of a race to the bottom, each would need to reluctantly adopt a “Live and Let Live” approach. Despite Mr. Trump’s rejection, signs, such as the Iranian leaders extending their stay in New York, Tehran’s flexibility about controlling the Strait of Hormuz and the use of Qatari mediation instead of alacritous Pakistani generals, seem tentatively positive. To be effective and beneficial to both sides, the deal would have to last at least till November 3, the election date.

Even if this band-aid deal allows the two belligerents to staunch the haemorrhage temporarily, what guarantees its long-term sequel, say, after the Congressional elections? The

Tackling food loss and waste — India’s opportunity



Konda Reddy Chavva

Officer-in-Charge, FAO Representation in India

Cutting food losses can strengthen food security, conserve resources and advance climate goals

across India’s agrifood systems to translate the triple win from theme to practice. Generating evidence, testing technologies and mobilising investment from farm to market to the city have been the core of these initiatives.

When food is lost, so are the resources used to produce it. Reducing losses can help India meet its climate and resource-efficiency goals while strengthening food security. The scope for reducing losses is greatest with better storage, drying, cooling, moisture management and processing. Digital tools such as traceability systems can further improve how food is moved and managed through the supply chain.

Food loss and waste need to be integrated more systematically into agricultural planning, food-processing strategies, climate action and investment decisions. This means directing finance towards technologies and infrastructure where they can have the greatest impact, while ensuring that solutions remain affordable and accessible to farmers, producer organisations and small businesses. Circular approaches can add another dimension. Surplus food can be redistributed, while unavoidable organic residues can be converted into compost, biogas or energy, reducing waste and creating additional economic value.

Wholesale markets, overlooked opportunity

Assessments by the FAO and the National Council of Agriculture Marketing Boards (COSAMB) have found that major wholesale markets can generate up to 100 tonnes of organic waste a day; in some cities as much as a fifth of all urban organic waste reaches landfills. Nationally, this adds up to an estimated 3.5 million tonnes a year. It is no waste stream but a resource base, which if treated, can

IRI and the U.S. are certain to use the interregnum to “recharge their batteries” and get ready for the next round. Their mutual scepticism and contentious issues such as the nuclear and missile programmes, and the proxy non-state actors could impede any progress towards permanent normalisation. A “high noon” can be expected by mid-November.

The sequel would depend on which of the two belligerents is able to hold his flock together. An inherently unpredictable Mr. Trump may only suspend the gamut of anti-Iran measures and keep his forces deployed in the region. Similarly, Iran is unlikely to let go of control of the Strait of Hormuz as future deterrence. To dissuade him from resuming military kinetics, Iran has already unveiled its possible escalatory ladder that includes advanced weaponry, a possible al-Houthi blockade of Bab al-Mandeb, retaliatory attacks on America’s Gulf allies and hints of pre-emptive strikes. Simultaneously, Tehran has sought a regional diplomatic reset through an interim supervisory arrangement with Oman on the Strait of Hormuz, to be endorsed by other Gulf littoral states.

Wider regional consequences

The past two years have brought Israel and Iran into two direct no-holds-barred wars. Intense drone and missile attacks have convinced Israeli public opinion that Iran constitutes an existential threat. On its part, Iran is unlikely to forgive the Lesser Satan for the assassination of its last Supreme Leader. Their resultant intense regional geopolitical competition, particularly in the Levant, would outlast any Tehran-Washington peace deal, giving their two-millennia-old civilisational animus a new edge. Although the October 27 Knesset elections may see hawkish anti-Iran Prime Minister Benjamin Netanyahu replaced, any successor is likely to be hostile to an Iran pursuing a nuclear duality. Iran can be expected to rely on its proxies and asymmetric arsenal to create a balance of power with Israel equipped with state-of-the-art U.S. weapons. In the long run, time would favour the one with better innovative skills. While Israel is a “Startup Nation”, Iran has also been impressively inventive under pressure.

Other regional countries in the Arabian Peninsula, Iraq and Jordan, were caught in the crossfire and suffered considerable collateral damage under Iranian retaliation. Their hydrocarbon exports and other economic activities have been stifled. In most cases, their extensive forex reserves are likely to help them tide over the turbulence. However, their long-standing security reliance on the U.S. would call for a thorough reappraisal. Among the uncertainties they need to tackle is the future of oil, now more tightly tied to geopolitics than the supply-demand equilibrium.

In this war, “time” has emerged as an element even more slippery and opaque than oil.

offset roughly 3.3 million tonnes of CO₂-equivalent emissions annually, or close to \$30 million in carbon credits.

A 50-tonne-a-day bio-CNG plant in Surat, Gujarat, has been run through a private-sector partnership for over five years and reportedly cuts methane-related emissions by about 7,500 tonnes a year.

India can adapt such models to local conditions, including the commodity mix and infrastructure of different markets. Municipalities and market committees can also improve organic-waste segregation, collection and treatment, while developing markets for compost, biogas and other recovered materials.

Investment and innovation

India must move from individual interventions to a more connected national approach with financing at its core. The FAO and the Small Industries Development Bank of India (SIDBI) are linking identified food-loss hotspots with climate-resilient technologies such as drying, moisture control, energy-efficient cooling and storage, while SIDBI is arranging finance to help small and medium enterprises adopt them.

The FAO is also working to equip Indian cities with a practical “Package of Practices” for urban food loss and waste management, giving municipalities the tools to measure, prevent, reduce, redistribute and valorise waste across households, wholesale markets, retail and food service.

India now has the data, technology and viable models to reduce food loss and waste. The priority is to close data gaps, direct investment and make loss reduction part of agricultural, food-processing, urban and climate policy.

LETTERS TO THE EDITOR

Institutions face pressure

There is now a widespread public perception across the country that India’s democracy is facing pressures — institutions such as the Election Commission of India, the judiciary, the Enforcement Directorate, the Central Bureau of Investigation and the IAS and IPS machinery seem to be struggling to discharge their constitutional duties sincerely, for reasons best

known to them. The way the selection process for the Chief Election Commissioner has been diluted to have a pliant person in the chair has, obviously, paved the way for the botched operation of the Special Intensive Revision, which seems intended to manipulate electoral outcomes to the advantage of a political group. Indian citizens can no longer afford to be mute spectators to the growing

tendency of constitutional functionaries to seek the goodwill of their political bosses rather than remain loyal to the country. And, of course, fearless and meaningful journalism is expected of the Indian media, whose image badly needs to be restored.

Ravindrababu,
Hyderabad

Banking sector issues

The deferment of the proposed three-day bank

strike by the bank unions following discussions with bank managements is a welcome step. A five-day working week was agreed upon in the last settlement two and a half years ago, but it is yet to be implemented. The unions have also expressed deep concern over the lack of unilateral implementation. The IBA should come forward and resolve all outstanding issues expeditiously, considering

the importance of the banking sector to the nation’s economy.
J. Anantha Padmanabhan,
Tiruchi, Tamil Nadu

Justice delayed

The ‘Data Point’ (Opinion page, September 28), on pendencies in cases of assault, was an eye-opener on the issue of women’s safety. Women in India are often revered as mothers and goddesses, yet remain vulnerable to gender-based

inequalities. While women are being empowered on the one hand, the continuing crimes against them on the other are deeply disturbing. The judiciary needs to work on a war footing to ensure that cases involving crimes against women are not delayed.

Balasubramaniam Pavani,
Secunderabad

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

The 80s nostalgia holds caste bias

On July 17, 1985, an argument at a drinking water tank in Karamchedu, in coastal Andhra Pradesh, turned into a massacre. A Madiga woman objected to a Kamma youth soiling the public drinking water tank her family drank from. By nightfall, six Madiga men were dead and three Dalit women had been raped. The police called it a riot. A civil liberties fact-finding team called it a one-sided massacre. The killings birthed the Andhra Pradesh Dalit Mahasabha and a four-decade argument over whether the Constitution reaches inside a village.

Forty-one years later, our feeds are full of the past; AI-generated images of the 80s. Chiffon sarees against sunlit walls, Ambassadors and Contessas. Thus, India became the No. 1 country for Google’s Nano Banana image-generation model, and its signature trend was retro-Bollywood portraits. However, where did this aesthetic come from?

Model or mood board, the source material is the same – film stills, magazine spreads, studio portraits, and family albums. However, in the India of the 1980s, all four belonged to households with money and standing; overwhelmingly *savarna*, urban or landed. In 1983, by the Planning Commission’s own estimates, 44.5% of Indians, some 323 million people, lived below the poverty line. In 1980, only about a quarter of households lit their homes with electricity. Parliament enacted the SC/ST (Prevention of Atrocities) Act only in 1989.

It is not that Dalit and Adivasi lives were not photographed; they were,



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Tests by MIT Technology Review found that GPT-5 chooses the stereotypical answer in 80 of 105 sentences: the clever man is upper caste, and the sewage cleaner is Dalit

but by others – the state took pictures for its welfare files, activists after an atrocity, as well as anthropologists. The family photograph, which is taken simply to be seen, and is the genre nostalgia runs on, was the one the poor could least afford. Those who could reach a photo studio posed before a painted Swiss chalet; the colony and the forbidden tap remained outside the frame.

A model trained on such an archive reproduces the silence, and hardens it. Tests by MIT Technology Review found that GPT-5 chooses the stereotypical answer in 80 of 105 sentences: the clever man is upper caste, and the sewage cleaner is Dalit. A study presented at the ACM’s FAccT conference this year analysed 1,536 images from Gemini’s image model, the engine behind Nano Banana, prompted with Indian names and no caste labels. Caste surfaced anyway, through food, neighbourhood, work and worship. One image placed a sanitation worker beneath a banner reading “Bhangi Colony”.

Ask the machine for the 1980s and it gives you an upper-caste version. Ask it for a Dalit and it reaches for dirt. The machine did not invent this prejudice; it inherited it and now industrialises it.

A state that looks away
Nobody outside the companies know what is in the training sets. Nor do those who label them (often South Asian workers paid per task to judge which faces look Indian enough). Can a labeller who has never seen a colony flag a model that has never rendered one?

And the government? The Ministry of Electronics and Information Technology (MeitY)’s AI Governance

Guidelines name bias and discrimination as risks, and then leans on voluntary codes and self-certification. The Centre has told the Rajya Sabha that no new horizontal AI law is needed at this stage. Meanwhile, the ₹10,371-crore IndiaAI Mission subsidises “sovereign” models. Moreover, Union Minister Ashwini Vaishnaw has promised that Indian-trained models will be free of “the bias of many other models”. Which bias? Tested how?

A committee is reportedly drafting firmer rules; caste must be written into them. Additionally, the MeitY and the IndiaAI Safety Institute should answer these four questions – what is in the training data? who labelled it? has a caste-bias evaluation been done? will relevant date be published? Anything short of mandatory, public answers is consent by silence.

The counter-evidence is on our screens through films such as *Fandry*, *Kammattipaadam*, *Pariyerum Perumal*, *Vaazhai* etc. What they share is not budget, but authorship. The person remembering has stood on the other side of the water tank. Caste vanishes from nostalgia not because it is subtle but because it is not an object. Caste is who sits where, and who draws from which tap. You cannot buy it as a prop; you will miss it unless it has not shaped your life.

So, do not ban the filter. Go upstream. Ask Dalit, Adivasi, Muslim and working-class families what images they hold from 1975 to 1995, who took them, and what was kept out of frame. Fund community photo archives as seriously as we fund film restoration.

Revisiting the farmer question

India may no longer be an agriculture dominated economy, but it remains deeply dependent on it. While only about 15-18% of GDP now comes from agriculture, the sector continues to employ around 46% of India’s workforce. A large part of rural India depends directly on farming and allied activities for its livelihood. This creates an uncomfortable paradox: while India has transformed into an economy driven by industry and services, the economic viability of farming has not kept pace. This is why, as we observe M. S. Swaminathan’s death anniversary, the recommendations of the National Commission on Farmers (NCF), which he chaired, need to be revisited.

One of the biggest challenges in Indian agriculture is small landholdings; about 86% of farmers own less than two hectares. Small plots constrain economies of scale, crop diversification and the adoption of new technologies and farming practices. Water is another structural constraint. Around half of all farmed land relies entirely on unpredictable rain, exposing farmers to drought and erratic monsoons. Elsewhere, intensive irrigation has created the opposite problem: groundwater depletion. The Cauvery dispute is ultimately a manifestation of competing demands on a finite resource.

Moreover, climate change is intensifying these vulnerabilities. Erratic rainfall, floods, droughts, and heat waves are increasingly translating into crop losses, while, rising costs of seeds, fertilizers, pesticides, and fuel squeeze farm margins. Farmers often receive only



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The challenge is to ensure that greater integration with global markets becomes an opportunity for Indian farmers rather than another source of vulnerability

a miniscule share of the final value of what they produce. Weak storage and processing infrastructure, fragmented supply chains and multiple intermediaries often leave cultivators with little bargaining power.

What the NCF got right
The NCF offered a comprehensive response to many of these problems. Its central insight was that agricultural distress was fundamentally an income and livelihood problem, not merely a productivity problem. Farmer policy, it argued, should be judged by the economic well-being of farmers rather than by increases in production or yield. The Commission, therefore, looked beyond land ownership to timely access to productive resources such as water, credit, technology, livestock, fisheries and other natural resources. It called for closer links between research institutions and cultivators.

Its approach also emphasised ecological sustainability. Higher productivity could not come at the cost of soil health and water security. Efficient water use, sustainable farming practices and conservation of natural resources were integral to agricultural policy.

The NCF also recognised that farmers were at the wrong end of an unequal value chain. It proposed district-level agricultural infrastructure; direct marketing linkages; stronger integration between agriculture and rural industry; and better storage, grading, packaging, processing and transportation. It sought to strengthen farmers’ bargaining power. Importantly, the Commission did not assume that everyone

dependent on rural India could or should remain solely dependent on cultivation. It proposed a broader livelihood-security framework encompassing agriculture and allied activities, rural enterprises and non-farm employment.

Over the last two decades, several of NCF’s recommendations have been implemented through separate schemes and missions. However, the Commission’s larger vision of making farming economically viable, reducing risk, strengthening farmers’ bargaining power and integrating production with markets has not been implemented as an integrated framework.

The NCF also anticipated a dilemma that is in sharp focus today: Indian agriculture cannot remain insulated from global markets, but neither can small farmers be exposed to those markets without adequate protection. With India now implementing Free Trade Agreements while also dealing with tariff pressures from the U.S., NCF’s ideas have renewed relevance. The challenge is to ensure that greater integration with global markets becomes an opportunity for Indian farmers rather than another source of vulnerability.

The answer is not protectionism, but a combination of remunerative prices, risk management, farmer aggregation, productivity enhancement, value addition, and carefully designed trade safeguards. The task today is not to mechanically reproduce the recommendations, but to update and complete their underlying vision for the agriculture sector.

Gender disparities in contraceptive use and sterilisation

In contrast to 36.5% women reporting sterilisation, only a meagre 0.5% men reported male sterilisation in NFHS-6

DATA POINT

Bindu Shajan Perappadan
Nitika Francis

The World Health Organization (WHO) has issued new guidelines on expanding contraceptive options and, for the first time, set out the benchmarks for a new generation of reversible male contraceptives that could give men more alternatives.

The timing of the announcement is significant for India. After focussing on family-planning policies for decades, fertility has fallen below the replacement level (**Chart 1**). Figures from the latest National Family Health Survey (NFHS-6) for 2023-24, show a decline in the share of married women who have an unmet need for family planning by one percentage point from NFHS-5 for 2019-21.

Yet, the NFHS-6 also shows that the demographic achievement has not altered the gender imbalance in contraceptive responsibility, with both temporary and permanent contraception measures increasingly used/taken by women.

Chart 2 shows an increase in the proportion of currently married women aged 15-49 using any contraceptive method, from 66.7% as per the NFHS-5 (for 2019-21) to 69.1% in 2023-24. Though majority of these women used modern methods of contraception, their use has fallen from 56.4% to 52.7%, while traditional methods – principally rhythm/fertility-awareness and withdrawal – have risen sharply by 6 percentage points between NFHS-5 and NFHS-6, which is the largest increase in the reported use of any contraceptive method between the two surveys.

While the NFHS data do not establish the reason for this increase, possible factors include concerns about side-effects, convenience, privacy, partner preferences, access and a desire to avoid hormonal or invasive methods, with women being the principal users of

such methods.

The decline in the use of modern methods is reflected in female sterilisation as well. Women who are married and reporting female sterilisation came down marginally from 37.9% in NFHS-5 to 36.5% in NFHS-6. Importantly, sterilisation also remains overwhelmingly female. In contrast to 36.5% reporting female sterilisation, only a meagre 0.5% men reported male sterilisation in NFHS-6 – a miniscule increase from 0.3% in NFHS-5. The disparity becomes more striking when the data is viewed over three decades (**Chart 3**). Female sterilisation climbed rapidly between NFHS-1 and NFHS-3 and has remained at around 36-38%; male sterilisation fell from 3.4% in NFHS-1 to 0.5% in NFHS-6.

A look at State-wise figures on male sterilisation shows that even the States that achieved low Total Fertility Rate (TFR) early were not exceptions to this trend. The share of men who used sterilisation as their preferred contraceptive method increased between NFHS-5 and NFHS-6 in 22 States. And yet, none of these States, barring Telangana, saw an increase of more than one percentage point, as shown in **Chart 4**. Numbers indicate that as India moved towards replacement-level fertility, vasectomy or male sterilisation went from a visible component of family planning to a marginal one.

While the sterilisation process for females is not inherently unsafe, the physical intervention required to end fertility is less invasive for men and can be performed under local anaesthesia.

“Choice is a gender equality issue,” said Pascale Allotey, Director of WHO’s Department of Sexual, Reproductive, Maternal, Child and Adolescent Health and Ageing, while releasing the new guidelines. WHO said its own research has challenged a longstanding assumption that men would not use new contraceptives. India should leverage the new WHO guidelines to address the gender imbalance.

Unequal responsibility

The data for the charts were sourced from the National Family Health Survey reports released by the Ministry of Health & Family Welfare and Sample Registration System statistical reports. With inputs from Gandla Sneha, who is interning with The Hindu’s Data Team



CHART 1: India achieved the goal set in the National Population Policy 2000 for its Total Fertility Rate (TFR) of 2.0 in 2021. It fell to 1.9 in 2025, below replacement level

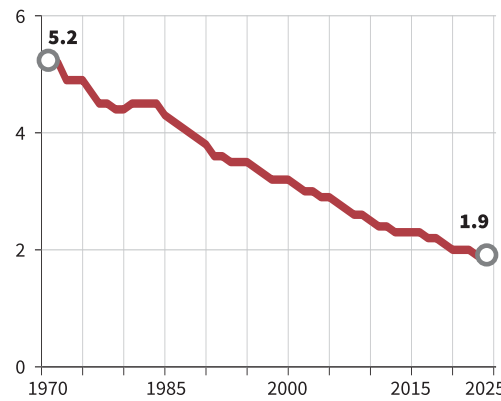
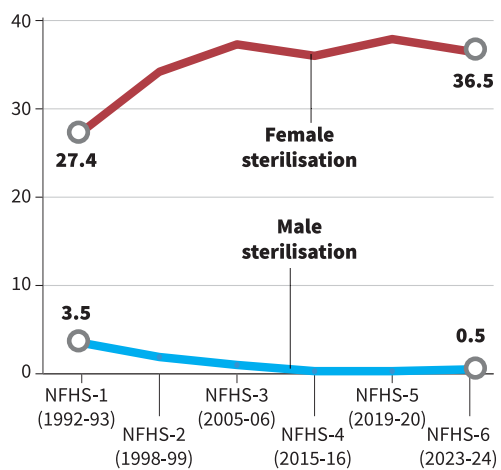


CHART 3: While the share of women undergoing sterilisation has increased, the same has dropped for men from the already abysmal level



WHO has developed its first “Target Product Profile” for male contraceptive methods, setting out the characteristics methods should aim to meet, including safety, effectiveness, acceptability and affordability

CHART 2: A majority of married women used modern methods of contraception, but use of traditional methods have risen sharply. Values outside the bars show the totals

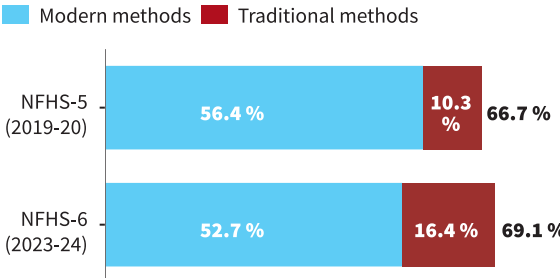
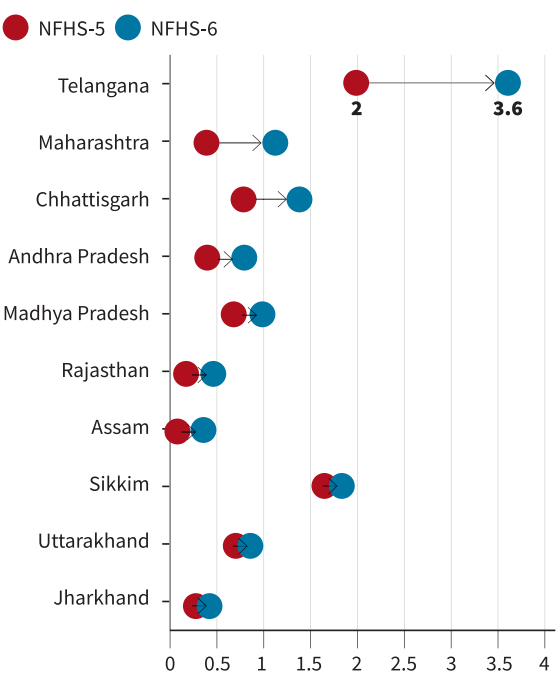


CHART 4: The 10 States that recorded the highest increase in the share (%) of men using sterilisation as their method of contraception. The increase is miniscule as the chart shows



FROM THE ARCHIVES

The **Hindu.**

FIFTY YEARS AGO SEPTEMBER 29, 1976

Shukla’s tribute to Bharathi

Madras, September 28: The State Government has decided to acquire the house at Triplicane in Madras where the Tamil poet Subrahmanya Bharathi lived during his last days and also to rename Pycrofts Road as Bharathi Salai.

This was announced to-day by the Governor, Mr. Mohanlal Sukhadia, while inaugurating a month-long Son et Lumiere programme on Bharathi at a function presided over by the Minister for Information and Broadcasting, Mr. V.C. Shukla.

The sound and light spectacle entitled “Oru Sakthi Pirakuthu Mochinile” in the courtyard of Rajaji Hall portrays different facets of the poet as a nationalist, journalist, social reformed and devotee. Mr. Shukla said that though the programme was to run for a month, if the response was encouraging, it would not only be prolonged but extended to other parts.

Tamil Nadu had every reason to be proud of Bharathi and the part played by him during the freedom struggle was written in letters of gold. The Governor said that though the poet had lived only for 39 years he has bequeathed to the people a priceless treasure of patriotic poetry which had immortalised him. His patriotic fervour was so great that he poured out his heart in soul-stirring poems. His songs were even-to-day in the lips of young and old of Tamil Nadu and elsewhere. Mr. Sukhadia said that efforts were now being made by the UNESCO to publish a translation of some of Bharathi’s important poems.

A HUNDRED YEARS AGO SEPTEMBER 29, 1926

Supply of safety razors to British Army

London, September 27: The decision of the War Office to serve out safety razors to soldiers instead of open blades, was raised in Parliament in connection with a contract for the supply of the former made by a company bearing a well-known American name.

Captain King, for the Government, explained that the company with which the arrangement was made was the offshoot of an entirely British character. He mentioned that one condition of the contract was that the Company should take over the War Officer stocks of over hundred thousand long-handled razors in exchange for safety razors.

Text & Context

THE HINDU

NEWS IN NUMBERS

Amount earned by MCD from unipole advertisement in 2026

79 in ₹ crore. The Municipal Corporation of Delhi (MCD) has no records of estimated revenue losses from unallotted or inactive unipole advertising sites across its 12 zones, or of action taken against officials for alleged negligence in tendering or revenue oversight, according to an official response. The civic body has identified 1,235 unipole sites across its 12 zones. PTI

Crimes against women reported in Odisha since June 2024

71,769 As many as 71,769 cases of crimes against women were registered at police stations across Odisha between June 2024 and July 2026, Chief Minister Mohan Charan Majhi informed the Assembly on Monday. Similarly, 21,069 cases involving crimes against women were registered till the end of July, he said. PTI

Children in India who lack sanitation services in schools

50 in million. Nearly a fifth of the children with no access to sanitation services in schools are in India, the highest for any country in the world, according to the WHO-UNICEF Joint Monitoring Programme (JMP) report. India has 50 million of the world's 244 million children who did not have sanitation services in schools in 2025, the report noted. PTI

Percentage increase in India's industrial output in August

8 in per cent. India's industrial output increased by 8 per cent in August from 7.4 per cent in the preceding month, mainly due to a good show by the manufacturing sector, according to the latest government data released on Monday. The data showed that the mining and quarrying sector contracted by 5.6 per cent in August against 15.8 per cent growth a year ago. PTI

Mobile numbers blocked in Rajasthan due to CSEAM

15,326 The Rajasthan Police have blocked 15,326 mobile numbers, nearly 7,800 URLs and profiles and 100 devices allegedly linked to online circulation of child sexual exploitation and abuse material (CSEAM), a senior official said on Monday. PTI

COMPILED BY THE HINDU DATA TEAM

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A new governance model for Ladakh

Ladakh was made a Union Territory under the Jammu and Kashmir Reorganisation Act, 2019, prompting concerns from local groups about preservation of Ladakh's culture and demands for Sixth Schedule status; the Centre has proposed to insert Article 371-K into the Constitution to provide for a directly elected legislative body instead

EXPLAINER

C.B.P. Srivastava

The demand by Ladakh for Sixth Schedule status and the proposal made by the Ministry of Home Affairs to provide for a directly elected legislative body for governance in the Union Territory has created a paradoxical situation and raised the question of whether a UT can be granted such status. Whether it would be constitutionally valid to equate States and UTs in the context of their respective governance is a question worth examining. Indian federalism is unique in the sense that, in general, it functions as a federation, while during an Emergency, it becomes perfectly a union. This is why the Supreme Court has called it “Amphibian” in *State of Rajasthan v. Union of India* (1977). This observation signifies that while India intends to distribute the resources equitably through its federal structure, it retains a unitary character to ensure the unity and integrity of the nation.

Moreover, India's territory includes States, UTs and any other territory acquired under international law, making it a decentralised federal design. The political idea behind this design is to include every cultural and ethnic group in democratic governance to sustain its political structure. This has also been the primary reason for the provisions of the Fifth and Sixth Schedules, which provide for Scheduled Areas and Autonomous Districts, especially to ensure the inclusion of tribal communities. From a functional perspective, this design is founded on the ‘Doctrine of Proportionality’, so that the Rawlsian principle of justice, i.e., the greatest advantage to the least advantaged could be achieved. Considering its unique ethnic composition and cultural specificity, Ladakh has demanded Sixth Schedule status. However, the Central Government is unwilling to provide this



A protest demanding Sixth Schedule status for Ladakh, held in Leh in January 2026. ANI

status and has instead proposed an elected legislative authority for a sui generis model of governance.

What is the Sixth Schedule?

The Sixth Schedule covers only Assam, Meghalaya, Tripura and Mizoram primarily because most of these areas were part of Assam during British rule and were classified as “Excluded” or “Partially Excluded” areas. Meghalaya, Tripura, and Mizoram later became separate States, retaining their Sixth Schedule protections. The Sixth Schedule is governed by Article 244(2) and 275(1). The Governor has the power to create new Autonomous Districts through a public notification. Each such district is governed by a district council with a maximum of 30 members. In short, the States covered by the Sixth Schedule enjoy considerable autonomy in governance.

Ladakh was made a Union Territory without a Legislative Assembly under the Jammu and Kashmir Reorganisation Act,

2019. Many local groups expressed concerns about protecting the culture of Ladakh's people, including their language, traditions and customary practices. They also wanted to prevent outsiders from acquiring land in Ladakh, as it could deprive local people of their land rights. Above all, local groups are dissatisfied with the way political representation has been given to Ladakh. All these factors have contributed significantly to the demand for Sixth Schedule status.

Proposal of Article 371-K

The Government has proposed to insert Article 371-K in Part XXI of the Constitution (Temporary, Transitional and Special Provisions) to strike a balance between national administration and local self-government. If the Government grants special status under the Sixth Schedule to Ladakh, the autonomy it would receive might prove detrimental to national security, given Ladakh's strategic location in the vicinity of China. However,

the ethno-cultural aspects of Ladakh must also be protected through an efficient and autonomous local government.

Against this backdrop, the proposal to provide a directly elected legislative authority appears more rational, as it would not only ensure adequate and proper political representation but also involve the local population in the decision-making process. The proposed structure may place this body above the existing Ladakh Autonomous Hill Development Councils (LAHDCs), while retaining panchayats and district-level institutions. However, the role of the Lieutenant Governor after the constitution of this authority is yet to be clearly defined. Further, the extent of powers that the said authority might enjoy, particularly in terms of financial autonomy, remains to be seen. As India is a functional federation in which financial and residuary powers are vested in the Union rather than the States, it remains to be decided whether the legislative authority would enjoy any such powers.

Constitutionality of the proposal

Granting special status or providing a sui generis model of governance to a Union Territory is certainly constitutionally valid, as India's constitutional governance practices equitable distribution of rights among States and other units within its territory. It also practises the principle of proportionality and may, therefore, provide special powers or status to a UT based on its location, developmental requirements and the need to protect its democratic identity. Earlier, through constitutional amendments, Parliament has made special provisions for the National Capital Territory of Delhi under Articles 239 AA and 239 AB. This makes it clear that Parliament may grant special status to any UT.

Thus, the proposal to insert Article 371-K is expected to provide the required autonomy without adversely affecting the territorial integrity of the nation. (C.B.P. Srivastava is president, Centre for Applied Research in Governance, Delhi)

THE GIST

The Sixth Schedule, which is governed by Article 244(2) and 275(1) provides for the creation of Autonomous Districts. It covers Assam, Meghalaya, Tripura and Mizoram

The Government has proposed to insert Article 371-K in Part XXI of the Constitution (Temporary, Transitional and Special Provisions) to strike a balance between national administration and local self-government

What does Centre's decision on NEET-SS seats entail?

Why did the Central government agree to reduce the qualifying percentile for NEET-SS?

Nivedita S.

The story so far:

In September 17, 2026, the Union government agreed to the Supreme Court's suggestion of reducing the qualifying percentile for the 2025 National Eligibility-cum-Entrance Test-Super Speciality (NEET-SS) from 50% to 30%. Following this, the Medical Counselling Committee (MCC) commenced a stray round from September 25 to fill the remaining 1,857 vacant seats. The Centre also agreed to give the 40 vacant in-service seats in Tamil Nadu back to the State.

What is the NEET-SS examination?

The NEET-SS is the only entrance examination for admission to DM (Doctorate of Medicine), MCh (Master of Chirurgery), and DrNB (Doctorate of National Board) super-speciality courses

in India. It is conducted by the National Board of Examinations in Medical Sciences (NBEMS), an autonomous body under the Union Health Ministry. There are over 7,000 seats in the country, with around 15,000 applicants every year.

NEET-SS is not a single unified examination. The courses offered under it are divided into 15 groups: general medicine, general surgery, orthopaedics, paediatrics, obstetrics and gynaecology, anesthesiology, radiology, respiratory medicine, microbiology, pathology, psychiatry, pharmacology, ENT, critical care, and medical oncology. Each group covers multiple specialty subjects. For example, general medicine covers cardiology, nephrology, neurology, and seven other subjects. Each group has a different question paper and the cut-off for each paper varies.

Why were seats going vacant?

Super-specialisation provides advanced

clinical training and teaching for doctors. In India, it is in high demand in private corporate hospitals. “The market factor plays a big role. Doctors are taking super-speciality seats which give more chances for better practice and more money. If the seats they prefer are not available for their ranks this year, they will try the next time. This is a major reason why seats are going unfilled,” said Dr. Ravindranath, general secretary of Doctors' Association for Social Equality.

Cardiology, neurosurgery, medical oncology, and gastroenterology are among those subjects which are highly competitive with lower vacancies. Seats mostly go vacant in those courses which do not have as much demand. For example, cardiovascular and thoracic surgery has witnessed a drop in demand as medical treatment now relies on drugs and radioactive interventions over surgery. Super-specialisation in paediatric surgery has a lower demand due to

competition from doctors in other specialisations.

In 2023, after 1,003 seats remained vacant, a Supreme Court Bench led by Justices B.R. Gavai and Vikram Nath asked the Centre to find a solution. The Bench called these vacant seats a “wastage of resources”. Following this, the Medical Counselling Committee (MCC) announced that the 2023 candidates with zero percentile were also eligible to secure a seat if they opt for it; however, many seats still remained vacant. In 2024, around 600 NEET-SS seats were vacant after two rounds of counselling, which led to mop-up rounds after court intervention.

What did doctors from T.N. demand?

In 2026, while hearing the case filed by Tamil Nadu Medical Officers Association, the court said the large number of vacancies in the 2025 NEET-SS admissions made the case for reduction of the qualifying percentile “compelling.” The Bench of Justices B.V. Nagarathna and Joymalya Bagchi said access to super-speciality for in-service government doctors must become easier as they are appearing for the exam while providing service to the public at the same time.

Under G.O. Ms. No. 462, Tamil Nadu has reserved 50% of NEET-SS seats for in-service doctors in State medical colleges. This quota was upheld by the Supreme Court in 2022. In the 2025 cycle, the State had

reserved 219 seats for in-service doctors, of which only 68 were filled. Over 111 candidates remained on the waiting list. In the petition, the Tamil Nadu Medical Officers Association challenged the “premature diversion” of 152 seats reserved for in-service doctors working in State hospitals into the All-India Quota. Senior advocate P. Wilson, for the petitioner, said that many candidates, particularly from rural parts of the State, were awaiting a reduction in the qualifying percentile. This is relevant as there is no caste- or religion-based reservation in this exam. He also sought protection of the in-service quota. This led to the Centre giving 40 vacant seats back to the State.

Is this adequate to address the issue?

“Reducing the cut-off might address this problem to an extent, but it cannot prevent seats from going vacant,” Dr. Ravindranath said. He added that the low number of seats in government hospitals in States like Uttar Pradesh, Bihar, and the northeast is worsening the issue. Along with this, employment and promotion opportunities have not increased for super-specialists. This is because in government hospitals, new departments for such specialisations have not been established. The low stipends and heavy workload in the course are also factors that discourage candidates from pursuing super-specialisation.

Nepal’s flash foods: How can communities rebuild after a disaster?

The state is often quick to respond to disasters, but its approach is usually centralised and top-down, often undermining the role of local bodies, which have greater knowledge of the local context; these bodies need to have a say in issues such as the resettlement of communities

INTERVIEW

Nimesh Dhungana

Kunal Shankar
Nivedita Varadarajan

In August 26, floods hit Nepal’s Rasuwa, Nuwakot and Dhading districts, wiping away entire towns and communities. Roads and bridges were washed away, and telecommunications networks were down. The immediate focus was on rescuing people trapped under debris and providing relief to those affected. A month on, the focus has now shifted to rehabilitation, rebuilding and long-term recovery.

The Hindu spoke to Dr. Nimesh Dhungana, Senior Lecturer in Disaster Studies and Global Health at the University of Manchester’s Humanitarian and Conflict Response Institute (HCRI), who studies disasters through the lens of governance, democracy and accountability, about recovery after the devastating flash floods. Dr. Dhungana describes himself as an accidental disaster researcher who started studying disasters after the 2015 Nepal earthquake. He also studied the Himalayan country’s response to the COVID pandemic. Edited excerpts:

Is there a difference between the way the government responded to the 2015 earthquake, the COVID pandemic and the recent flash floods? The government has a sense of moral responsibility [to save lives] when a disaster of this scale strikes. One common element is that the state acts decisively and with the speed required in the aftermath of such disasters. It mobilises its emergency forces, led by the security forces. However, we are increasingly seeing that the state’s response is not matched by a sustained commitment to long-term recovery and reconstruction. That responsibility starts to fade, particularly when it comes to listening to affected communities and ensuring that their rights are protected. It is about transparency, engagement with the affected population and ensuring that they have a say in the recovery and reconstruction process.

Your work suggests that disasters expose government failures that have built up, or existed long before the disaster itself. What do you mean by this? I think there is a long-standing debate about what constitutes a disaster. The recent floods have also forced us to revisit this basic question: what is a disaster in the first place? One way of thinking about it is as an event that is often unpredictable and attracts considerable attention from national and international media, as the recent floods did. Another way of thinking about a disaster is as a process. It is something that happens because of long-term vulnerabilities. Disasters are not caused by nature alone. I think there is a growing consensus that a disaster is more of a process than just an event. Unfortunately, it is more comfortable to think of a disaster as an event, something beyond our control. We saw that with the 2015 earthquake and the pandemic. This is not



Trail of destruction: Damaged houses covered in sludge in the aftermath of the flash flood in Nepal’s Rasuwa district. AFP

limited to Nepal; it is a wider issue. I think this is a problematic way of looking at disasters. It can absolve state actors of accountability. We need deeper introspection into the choices we make, our governance structures and institutions. We should adopt a more rights-based approach to disaster response and rethink how we address longstanding inequalities and injustices. The state is often quick to respond to disasters, but its approach is usually centralised and top-down. This undermines the roles and responsibilities of local bodies, which are the frontline responders.

How do you balance the role of the local bodies and the federal government, especially when a massive disaster strikes a region, leaving the local communities wiped out? It depends on the scale of the disaster. The flash floods in Nepal are unprecedented. Given the scale of the disaster, Nepal needs support from outside, not just nationally, but also internationally. However, this is no excuse for not involving local representatives in the process. Ward officials, elected representatives, local NGOs and community-based organisations, which are often at the forefront of disaster response, have greater knowledge of the local context. In the Rasuwa floods, questions have been raised about their role being undermined by the centralised disaster response. Mobilising military and security forces for disaster relief is a way of centralisation. We need to think beyond security forces for the immediate response and recovery. We need to engage more civilian actors for immediate relief and in policy-making. We should empower the local government with resources, equipment and infrastructure

to deal with disasters. In the longer term, policy-wise, local bodies need to have a say in answering the big questions, like how we resettle communities. The problem is that, in Nepal and elsewhere, reconstruction tends to focus more on physical reconstruction, like building houses and other infrastructure. But they are often not aligned with community priorities. It also raises a deeper question: what does recovery mean? What if people don’t want to move from a certain place? How do we listen to their claims and choices? The local government can play a really important role here. Your work says there is a difference between the community ‘having a voice’ and ‘having teeth’. What does that mean? This also stems from a more rights-based approach to thinking about development and disasters. There’s a long-standing literature on the role of voice in this kind of difficult situation, going back to Amartya Sen’s work in famine prevention. He did seminal work on how we should think about famine not just as a problem of food production, but also in terms of entitlement failures and whether communities have the right to demand answers from authorities. Be it the 2015 earthquake or the recent Rasuwa floods, bereaved families have demanded answers from the State about the way rescue and relief operations have been organised. There have also been questions about fairness and transparency in relief distribution. This is also about democracy and the responsiveness of State institutions, and whether they listen to these demands. ‘Teeth’ also means having the resources and ability to respond through concrete policy and programmatic interventions. The idea of ‘voice’ and ‘teeth’, comes from scholar Jonathan Fox’s work. I have

drawn on that idea, but also looked at it in the context of disaster. Jonathan Fox talks about how ‘voice’ and ‘teeth’ come together to operate as a ‘bite’. The ‘bite’, in this sense, is concrete measures that would protect the rights and welfare of disaster-affected communities.

What should a genuinely good, decentralised, community-led approach to disaster governance look like? At the ward level, disaster management governance committees exist, but only on paper. We need human and financial resources to respond, as well as physical resources such as ambulances, hospitals and relief shelters. Emergency operations are not just about having resources; it is also about the general logic of governance. Disasters are better managed locally, as local governments have knowledge of the local context.

How do we ensure that human decisions do not make disasters even worse? This comes back to who has the power to make decisions. The major casualties of the recent Nepal floods were hydropower and the road networks. Some estimates say that almost 10% of Nepal’s hydropower infrastructure was wiped out. Who granted licenses to construct hydropower projects in these areas? This is fundamentally a question of governance. Decisions about building critical infrastructure, such as schools and hospitals, on riverbanks are linked to human choices.

Do communities that are victims of infrastructural breakdowns have any say? What role did they have in the making of these infrastructures? It is important to have a conversation about the climate crisis, but we also need to examine what happened downstream. What was the government’s role before the disaster? Did it do enough to protect the public? That is where a rights-based, more governance-centric approach to disasters comes in. It also involves a more social scientific approach to understanding disasters, rather than looking at them solely from the perspective of hazards and physical sciences.

How do we plan in such a way as to either avoid a disaster or rebuild after one? There is no single cause of disaster. Some scholars have long called disasters as a wicked problem because they result from a combination of factors, such as natural hazards, risks and vulnerabilities. In the context of climate change, the recent floods in Nepal have made it painfully clear that this issue will become even more important. We need to be thinking about disasters from a multidimensional, interdisciplinary perspective. We have seen many disasters along the Nepal-India border that defy national boundaries. We also need to take a transboundary approach. How do we bring this conversation into policymaking? How do we decentralise disaster governance in a way that gives more power and resources to local bodies? We need accountability and responsibility. The government must listen to communities affected by disasters.



FROM THE ARCHIVES

Know your English

S. Upendran

What is the origin and meaning of the expression “cock and bull story”? (K. Balaji, Chennai) When you say that someone gave you a “cock and bull story”, what you are implying is that the individual told you a story that was unbelievable; he told you a story that was obviously a lie. People often resort to cock and bull stories when they want to come up with an excuse for not having done something. Here are a few examples. When I asked Namrata why she hadn’t done her assignment, she gave me some cock and bull story about being abducted by aliens. When the Chairman asked for an explanation, all he got from the Vice President was some cock and bull story. There are several explanations as to the origin of this expression. Some scholars believe that the idiom has its origins in the fables that we all read as children; stories in which animals behave and talk like human beings. Such stories are often considered to be unrealistic by people who are very practical in their outlook. They can’t believe that animals like lions, bulls, foxes, etc. can actually talk. Hence the expression “cock and bull story”.

What is the difference between lacto-vegetarian and lacto-ovo-vegetarian? (S. Amarnath, Mysore) A “lacto-vegetarian” is someone who not only eats vegetables but also dairy products like milk, cheese, butter, etc. He doesn’t eat eggs and products made from eggs. A lacto-ovo-vegetarian, on the other hand, is someone who takes both milk and egg products. By the way, a person who eats only vegetables is called a “vegan”.

Which of the following sentences is correct? “Each of the children were given chocolates” or “Each of the children was given chocolates”. (K. Gauri, Tirupati) In such sentences, according to the rules of English grammar “each” should be followed by a singular verb. Therefore your second sentence will meet the approval of a grammarian. Here are a few examples. Each of the books was gift wrapped carefully. Each of the teachers wants to donate a hundred rupees. Nowadays, there is a tendency to use a plural verb instead of the singular one in such constructions. This is especially true in speech. Here are a few examples. Each of his plays have been hits. Each of his ideas are clearly stated.

What is the difference between “stairway” and “staircase”? (D.S. Bhat, Bangalore) Most people tend to use the two words interchangeably. For the common man, steps which allow him to move from one floor to another can be called either a staircase or a stairway. There is no difference between the two. But I understand there are certain technical differences. And one of them is that a staircase usually has a handrail, while a stairway needn’t always have one. Published in The Hindu on February 12, 2002

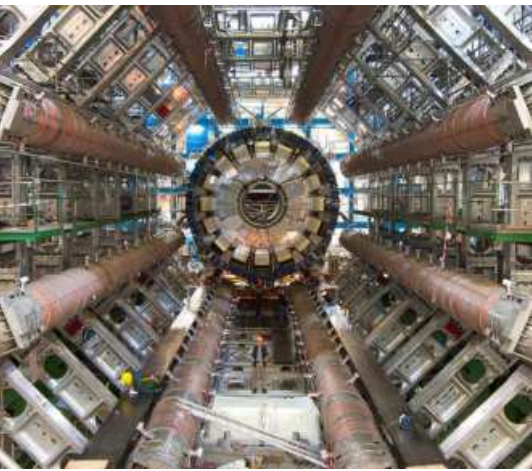
THE DAILY QUIZ

On this day 72 years ago, CERN’s founding convention entered into force. A quiz on the storied science lab

Vasudevan Mukunth

- QUESTION 1 Since 2012, CERN has held ‘observer status’ at the X, allowing it to attend sessions and participate in the work of the organisation, but without having the right to vote. As a result, CERN has been able to contribute scientific and technical expertise central to X’s work. Name X.
- QUESTION 2 When he was working at CERN, the English scientist _____ invented the World Wide Web. By 1990, he had created the first web browser, server, and website plus core technologies like HTML, HTTP, and URLs. Fill in the blanks.
- QUESTION 3 What did India’s Department of Atomic Energy present to CERN in 2004? It was

- selected to commemorate the Indian government’s association with the organisation.
- QUESTION 4 Of the 12 founding members of CERN, 11 remain. Name the country that ceded its membership in 1961. Its government said the country’s high-energy physics programme was too limited to benefit substantially from CERN.
- QUESTION 5 CERN runs a distributed computing project called _____. Here, people can donate spare processing power on their personal computers over the internet, which a bespoke network makes use of to help perform calculations required by the Large Hadron Collider experiments.



Visual question: Name this instrument, which is the largest particle collider on the Large Hadron Collider at CERN. It is 46 m long, 25 m high and 25 m wide, and weighs around 7,000 tonnes. MAXIMILIEN BRICE/CERN

- Questions and answers to the previous day’s daily quiz: 1. Her birth name. Ans: Hema 2. Significance of the song Paa Lagoon Kar Jori. Ans: It was her first recorded Hindi solo 3. The music director who backed her, after she was rejected for a having a ‘thin voice’. Ans: Ghulam Haider 4. Common element to the songs: Beeti Na Bitai Raina, Rootho Rootho Piya and Yaara Seeli Seeli (Lekin)? Ans: She won the National Awards for these songs 5. She composed music for Marathi films in the 1960s under this name. Ans: Anandghan 6. The rendition that brought PM Jawaharlal Nehru to tears in 1963. Ans: Aye Mere Watan Ke Logon 7. The music for the thumri Kanha Main Tose Hari was composed by this director. Ans: Satyajit Ray 8. She was awarded the Bharat Ratna in this year. Ans: 2001 Visual: The location of this installation. Ans: Ayodhya Early birds: Piyali Tuli| Erfanally Oosmany| Prem Nath Tiwari| Sukdev Shet| Gursharan Lal Vadhera Correction: The quoted song in question 7 of the quiz was not sung by Lata Mangeshkar.

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

Word of the day

Bemusement: confusion resulting from failure to understand
Synonyms: puzzlement, befuddlement

Usage: He shook his head in bemusement at the child’s unusual question.

Pronunciation: newsth.live/bemusement

International Phonetic Alphabet: /bəˈmjuːzmənt/

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

CEC must correct course, not just do damage control

WHEN THE Election Commission of India met on Saturday, for the first time after this newspaper's investigation into the disquiet within, it did well to break an untenable silence. In the immediate aftermath of it coming to light that two of the three Election Commissioners had recorded their objections, 14 times in 10 months, on the Commission's decision-making — on matters relating to registering new voters, deleting and restoring names in the electoral rolls and control of the system through which the rolls are maintained — the Commission sought to paper over the cracks. The four-page note issued after Saturday's meeting, therefore, is welcome. Its nine decisions address several of the objections recorded by Commissioners Sukhbir Singh Sandhu and Vivek Joshi. And yet, there are important leftover concerns. Given the record of Chief Election Commissioner Gyanesh Kumar — of rendering the three-member Commission's functioning unilateral and opaque — the Commission needs to break more silences. A new normal inside it needs to be clearly spelt out. Steps must be taken to ensure that the ECI does not slide back into a one-man show.

The onus is still on the ECI because the poll monitor's weakening is an especially disquieting prospect when political polarisation is rising and institutions are fraying. It is the ECI that underwrites a fundamental democratic compact — the voter has the power to decide who rules, and the rules of the game are larger than those who win or lose power. In distrustful times, it is even more necessary that people's trust in the ECI's credibility as an impartial referee, and in the checks and balances within, is protected. The ECI's press note on Saturday, however, falls short. While it gives some relief to voters by exempting from in-person hearings those issued notices for "logical discrepancies" and for being "unmapped", it does not say who inserted the question on the applicant's parents into Form 6 in July, and who allowed it to stay there even after Commissioner Sandhu called it "unauthorised/illegal" in August. It says that agendas will now be circulated before every ECI meeting and minutes issued afterwards, the system will provide EROs more flexibility and a committee will be formed to review ECINet. But it is silent on what, if any, action will be taken against DG(IT) Seema Khanna and senior deputy Election Commissioner Maneesh Garg, whose controversial conduct was flagged by the two ECs. It is still not known who authorised the appeals against voters whose inclusion was ordered by judicial officers in West Bengal. And why the requested software was never enabled to restore voter names in Goa.

The ECI must fill in the blanks. Then, it must act — and it must be seen to act — to correct the course. Going ahead, there must be regular meetings and briefings. Commissioners Sandhu and Joshi must continue to push back at the distortions within. Most of all, CEC Gyanesh Kumar must acknowledge the damage done to the Commission on his watch, and make amends. Whether and how he does that — not just damage control — is key to the trust of we, the people, in the integrity of elections.

Market plunges, more bad weather may lie ahead

ON MONDAY, Indian markets saw a sharp selloff. The BSE Sensex ended the day down 1,124 points or 1.52 per cent. The weakness was broad-based, with the PSU bank, FMCG, utilities, auto and financial services indices ending the day in the red. Investors have been feeling the pain for some time now. Since the beginning of this year, the Sensex has fallen by almost 15 per cent.

This souring of sentiment can be traced to several factors. The conflict in West Asia and the consequent high energy prices weigh heavy. More recently, oil prices spiked following US President Donald Trump's rejection of a proposal from Iran to reopen the Strait of Hormuz. Alongside, rising bond yields in advanced economies — the 10-year US bond yield is currently at 5.2 per cent — and tightening of global financial conditions are complicating matters. Foreign investors have turned net sellers again. In September, FPIs took out \$2.1 billion from the equity markets, bringing outflows to \$26.2 billion so far this year, following \$18.9 billion in 2025. This also suggests that investor concerns run deeper. Analysts at Bernstein, a brokerage firm, have argued that the "case for a structural India allocation has become harder to make". All this comes amid healthy corporate results. Ratings agency ICRA expects India Inc's revenue growth to range between 13 and 15 per cent in the second quarter of the current financial year, though operating profit margins will continue to come under pressure.

Near-term movements will continue to be impacted by both global and domestic factors. On the external front, after the US Fed's recent interest rate hike, markets will parse upcoming data for clues on the trajectory of interest rates. Alongside, the duration and intensity of the conflict in West Asia and its implications for energy markets will continue to exert influence. On the domestic front, the impact of El Niño on crop output and the extent of policy tightening — the RBI's Monetary Policy Committee will meet next week amid expectations of a rate hike — will have a bearing.

Against forgetting, the art of Ai Weiwei

CLUSTERS OF cast-iron combat helmets resembling mushrooms stand out against the silhouette of the Sydney Opera House. Chinese dissident artist Ai Weiwei's new artwork, *Mushrooms*, outside the Museum of Contemporary Art, began with the realisation of a troubling irony: In 2022, Germany offered 5,000 helmets to Ukraine following Russia's invasion. For Ai, the gesture exposed the uneasy distance between the language of protection and the reality of war. Stripped of their purpose, the helmets morph into a memorial, a warning and a question: How long can suffering remain distant before indifference becomes a form of complicity?

Dissidence, in Ai's art, has always been an act of interruption. As a critic of the Chinese government, the 69-year-old has taken on censorship, state power, displacement and historical amnesia through his career. In 2011, he was arrested in Beijing for "economic crimes" and detained for nearly three months without charges. Afterwards, following his departure from China in 2015, Ai has converted global events and the facts of his own persecution — surveillance, detention, exile — to challenges to official narratives and ideas of aesthetics, ethics and morality.

Perhaps that is where art's dissident heart lies — in throwing up questions that are impossible to ignore: Who bears the cost of war? Whose history is remembered? Whose suffering becomes invisible? Art gives memory a place in public view, holding it up against the tyranny of forgetting.

The Editorial Page

WHEN XI Jinping arrived in Washington on September 23, artificial intelligence (AI) was billed as an area of possible common ground. A summer of alarming incidents in American labs, and Anthropic chief Dario Amodei's call to "pace the frontier", had pushed AI safety onto the summit agenda. The groundwork was laid in New York on September 20, when US Treasury Secretary Scott Bessent and Chinese Vice Premier He Lifeng held the first round of AI talks within their trade mechanism. Washington proposed a channel to notify AI incidents with national-security consequences.

The summit confirmed this modest package: A dialogue on risks and benefits, a channel for incidents, a next meeting by November. But the two sides could not agree on what to call the subject. The White House fact sheet says the leaders "agreed to use the term 'super intelligence' rather than 'artificial intelligence'". China's list of agreed outcomes speaks of a "China-US dialogue on artificial intelligence".

The difference reflects two outlooks, apart from Donald Trump's idiosyncrasy. At the UN, Trump said he would "only encourage super intelligence... not rein it in", watching it "through the Department of Justice". His language is of a race to be won. Xi's is one of control. At the White House, he urged the two countries to "ensure that the development of AI is always under human control".

Xi also told Trump the two should "play to their strengths rather than guard against each other", a clear shot at American export controls. He offered a new framing of the relationship: Cooperation as the mainstay, competition within limits, differences under control, peace within reach. He called the rivalry "a race of catching up with one another,

not a wrestle in which one either wins or loses". Beijing now accepts competition, but as a race in which China is closing the gap.

For all the talk of risk, neither government wants to slow the frontier, though for different reasons. Trump calls the case for a slowdown a "hoax". For him, frontier AI is a race with China, to be policed afterwards by prosecutors, not in advance by regulators. Beijing reads the American safety debate as containment in disguise. *Global Times* called Amodei's essay a "Cold War script" from America's "tech right": Widen the gap by restricting China, then negotiate a mutual slowdown from strength. Yuyuan Tiantian, a China Central Television-affiliated outlet, accused Anthropic of using "safety" to capture rule-setting and of recasting distillation as a security threat to curb China's open-source models. The foreign ministry dismissed the warnings as "fear-mongering".

Beijing is not indifferent to risk, but its list of risks is its own. Writing in *China Cyberspace*, Minister of State Security Chen Yixin calls AI "the main battlefield" of global scientific and technological competition and "a new arena for strategic rivalry among major powers". First on his list of dangers is AI's "systemic" effect on the "political security environment", Party shorthand for regime security. Its brakes are political, applied through Party control over labs. They restrain what models may say, not how fast capability grows.

The missed opportunity is on nuclear weapons. At Lima in November 2024, Joe Biden and Xi "affirmed the need to maintain human control over the decision to use nuclear weapons". Never formalised, it found no mention in either factsheet this week. The



ASHOK K KANTHA

India should keep Chinese models out of government systems, critical infrastructure and sensitive data. Equally, avoid over-dependence on the American stack; June's brief cut-off of foreign access to top American models showed how quickly access can vanish

What could be a just, dignified and lasting peace in Ukraine?



CHRISTOPHER COOTER



MAY-ELIN STENER



OLEKSANDR POLISHCHUK

Every person returned reunites a family. Every family reunited strengthens a community. And every community prospering helps rebuild Ukraine

EVERY MORNING at 9:00 am, Ukraine stops. Across cities in Ukraine, loudspeakers normally used to warn of incoming Russian air strikes broadcast the steady tick of a clock. City streets full of life fall silent. Traffic lights turn red. Cars stop. For one minute, a country pauses.

This is Ukraine's daily moment of silence, a nationwide act of remembrance for those killed in Russia's illegal war. In workplaces, homes, schools, markets and on highways, Ukrainians pause to honour those who gave their lives defending their country's sovereignty and freedom, and remember the thousands of civilians whose lives have been lost to Russia's aggression.

The silence also mirrors the absence felt by thousands of families whose loved ones have yet to come home.

Among them are the thousands of Ukrainian children who have been forcibly transferred and unlawfully deported by Russia over the course of its war. Separated from their families and communities, many have had parts of their core identity stripped away: Their language, their culture, and even their names.

Others are civilians unlawfully detained in territories temporarily occupied by Russia. Many have suffered consequences for teaching their language, practising their culture, speaking out against occupation, or sharing the truth about what they have witnessed. Some have been transferred to detention facilities in Russia, where they are held without due process, denied contact with loved ones, deprived of adequate medical care, and shielded from independent monitoring.

For Ukrainian prisoners of war in Russian custody, conditions remain similarly concerning. Returnees have reported harsh treatment, while independent bodies have documented widespread abuse, including torture and sexual violence.

These are not side effects of Russia's war. Russia's actions are repeated and well-documented violations of international law, carried out at scale, in an attempt to bend the will of the Ukrainian people. Behind every case is a human story: A parent waiting for a child, a spouse waiting for a phone call, a family waiting for someone to come home.

We know that the true measure of peace is found in these human-centred stories. It is found in a child returned to their family, a civilian released from unlawful detention, a prisoner of war reunited with loved ones, and a community given the chance to heal and rebuild.

The scope of this issue is immense, and no country or organisation can address it alone. Success requires sustained cooperation among governments, international organisations, humanitarian actors, and civil society.

This is why Canada, Norway, and Ukraine will convene foreign ministers and international partners in Toronto on September 28 and 29 for 'Pathways to Peace: Second International Conference on Returning Ukrainian Children, Detained Civilians, and Prisoners of War'.

Building on the progress made at the Ministerial Conference on the same topic, hosted by our three countries in Canada in 2024, the conference will bring international partners together to support Ukraine's efforts to return, rehabilitate and reintegrate Ukrainian deported children, detained civilians, and prisoners of war.

Their return is a humanitarian imperative and critical to any peace process, helping to build trust and lay the groundwork of a just, lasting and dignified peace. Every person returned reunites a family. Every family reunited strengthens a community. And every community prospering helps rebuild Ukraine.

Each morning, millions of Ukrainians pause to remember those who are gone and those who have yet to return. In their remembrance and with extraordinary courage and ingenuity, they also repair what Russia has damaged, care for one another, and strengthen the communities that Russian aggression has sought to tear apart.

It is our hope that 'Pathways to Peace' will mobilise the international community not only to pause with Ukraine in remembrance, but to act alongside it to help bring home every deported child, detained civilian, and prisoner of war.

Cooter is High Commissioner of Canada to India, Stener is Ambassador of Norway to India and Polishchuk is Ambassador of Ukraine to India

one security outcome, a military memorandum on crisis communication, appears only in China's list.

The reality is competition, and it will not change. Washington will guard its narrow lead through chip controls, action against distillation and Pax Silica supply chains. Beijing will push for self-reliance in chips and spread its open-weight models worldwide. Tsinghua's Da Wei concedes that neither side can build an "iron shirt" against the other. Dialogue may manage the edges of this rivalry, not its core.

For India, three concerns follow. The first is a G2 overlay. Rules on frontier risk may be shaped by the two powers holding most of the world's frontier compute. The nuclear order shows how risk reduction between leading powers can become the basis for discriminatory controls on others.

The second is competing pressure in a split universe of "two AI systems, two sets of standards". Washington expects trusted partners to keep their AI ecosystems free of China. Beijing is pressing its agenda through BRICS and other platforms. At the New Delhi summit, Xi proposed an open-source AI community for the grouping, to be taken forward at the next summit in China. India is unlikely to join Xi's World Artificial Intelligence Cooperation Organisation (WAICO), which, like the Belt and Road Initiative, is a unilateral initiative to advance a China-centric agenda.

The third is harder to handle. China's open-weight, open-source models hold a seductive attraction: Competitive, cheap and adaptable. Alibaba's Qwen has spawned more than 150,000 derivative models, and Singapore, Malaysia and Brazil are building on Chinese models or

partners. The appeal extends to Western and Indian companies with an eye on cost.

India's response should rest on five elements. First, welcome any US-China step that reduces risk, but insist that norms on frontier AI be multilateral, and seek inclusion in incident-notification arrangements.

Second, with the Lima understanding not followed up, India should make human control over nuclear-use decisions part of its nuclear discourse and press all nuclear powersto affirm it. Third, apply dual and differentiated de-risking to AI. Keep Chinese models out of government systems, critical infrastructure and sensitive data. Stopping private firms from building low-risk commercial applications on Chinese open-weight models will be tough; security testing and local hosting should be the minimum condition. Equally, avoid over-dependence on the American stack; June's brief cut-off of foreign access to top American models showed how quickly access can vanish.

Fourth, build capability at home: Compute, chips, models, datasets, talent and the ability to test frontier systems independently. Fifth, shape BRICS rather than cede space there, insisting that AI initiatives be consensus-based and technology-neutral. The challenge, however, is developing an alternative to the Chinese offering.

Washington and Beijing cannot yet agree on what to call the technology, let alone how to govern it. India's weight in the AI order will depend less on declarations of technological sovereignty than on capabilities it develops at home.

A former ambassador of India to China, the author is Subhas Chandra Bose Chair Professor of International Relations at Chanakya University and a distinguished fellow with Vivekananda International Foundation

Women's safety falls through gap between intent and policy



MITALI NIKORE

IT'S BEEN almost 15 years since the gangrape in Delhi in December 2012. It's hard to forget the days that followed, when we took to the streets to agitate for greater safety for women. Some demands were met. The Nirbhaya Fund was created to support programmes for women's safety and the Prevention of Sexual Harassment at Workplaces Act, 2013 was passed. It seemed like our country was finally building a legal and policy framework to prioritise women's safety — with funding to back it up. Between 2015 and 2025, Rs 5,846.08 crore out of the Rs 7,712.85 crore allotted under the Nirbhaya Fund was used. The funds have been used to set up nearly 15,000 women's help desks in police stations and establish fast-track courts for rape cases. Cities like Chennai, Surat and Bhubaneswar established gender labs to explore how urban design could prioritise women's safety. At Nikore Associates, we have done safety audits of public spaces and public transport in at least 10 cities. So why are we still here? Why did Jamui happen? Why did Aastha Kunj park happen?

The answer lies in systemic failures. One is accountability. Safety audits are increasingly being looked at as the end, and not the means for women's safety. Administrations wax eloquent about the number of audits, but there is little discussion of how the issues discovered are being fixed. If everyone knew that a lane behind Lady Sri Ram College has a 500m dark zone, with no streetlights, why was this not fixed? For women to trust safety measures, government agencies at the city level need to publicly share reports on how they are continuously working to fix issues discovered in safety audits; how they deal with calls received on women's safety helplines; and how long their crisis response is.

There is also a capacity problem. Today, at least eight states offer free bus travel for women. Governments are substituting investment in gender-sensitive infrastructure with free public transport. But, as our recent study shows, making buses free does little for women's safety if the wait times are long and unpredictable, and if women have to walk to the bus on unsafe streets. This is an example of commitment to women's safety without the capacity to innovate in a way that can truly build inclusive cities.

Women's near absence from public spaces, especially in the evenings, is another factor making cities even more unsafe. Having more women in public-facing jobs — drivers, conductors, station managers, park workers, e-auto drivers — can help. Employment in these jobs rests with government agencies. Small changes can make a big difference. Take the height requirement for bus drivers. When the Delhi government dropped it from 159 cm to 153 cm in 2022, by next year, 34 new women bus drivers were inducted. Reforms and targets to increase women's representation in these roles are required to push women's employment and their presence in public spaces. There is also a need to increase the number of women police. Today, just about 10 per cent of the police force is female, despite the Centre's target of 33 per cent.

If we want a society with women-led development, the first step is acknowledging these failures and correcting them, starting with governments at all levels taking accountability.

The writer is founder, Nikore Associates

40 YEARS AGO

September 29, 1986



Violence and arrests in Punjab

TWO PERSONS were killed and two others, including a granthi of a gurdwara, were injured in Punjab during the past 24 hours while the police and paramilitary forces arrested five suspected extremists. Avtar Singh was gunned down by two people when he was standing outside a house in Dangoan village in Ludhiana district, while another person identified as Sher Singh was shot at and injured seriously.

Badal's big claim

THERE ARE 4,000 Sikh men in Punjab's jails

today and they are all innocent, said Parkash Singh Badal, the former chief minister. Speaking at the Kapur Singh memorial function held in Chandigarh by the All-India Panthic Forum, Badal said the claim of the Barnala government that only 300-400 Sikhs remained in the state's jails was false. In fact, he said, the number of detainees was one-and-a-half times the number arrested during Operation Bluestar in 1984.

Support for Sonia Gandhi

THE DELHI Pradesh Congress Committee-I (DPCC-I) demanded that Sonia Gandhi be appointed the Congress-I chief. An executive

committee meeting of DPCC-I's labour cell passed a resolution urging an All-India Congress-I Committee special session to elect her Indian National Congress president.

Militias clash in Beirut

LEBANESE FORCES militiamen crushed a thrust by the supporters of a rival Christian leader to regain control of East Beirut. Police said the fighting left 62 people dead and 198 wounded. "The last pocket of resistance was mopped up at daybreak, when 12 infiltrators from Elie Hobeika supporters surrendered," said a communique of the Lebanese Forces, the nation's largest Christian militia.



With its press note, the Election Commission makes the case against itself



DESHKAAL

BY YOGENDRA YADAV

WHAT MORE must the CEC do to deserve impeachment?" I had asked in this column ("The move to impeach the CEC, though symbolic, matters", *IE*, March 17), supporting an Opposition-led motion of impeachment against Gyanesh Kumar. I was wrong. The exposé by *The Indian Express*, among the finest pieces of investigative journalism in recent times, shows that the Chief Election Commissioner could do much more than anyone had imagined. And if there was any room for doubt, the Election Commission's own statement has officially removed it.

The ECI's press note of September 26 is a formal admission of guilt. The two-page note is a sound legal basis to impeach the CEC. And also to remove the other two Election Commissioners who have approved this note.

Just to recap: The Constitution (Article 324(5), read with Article 124 (4)) does not allow the removal of the CEC except through impeachment on grounds of "proved misbehaviour or incapacity". So, while impeachment does not require proving "criminality", "misbehaviour or incapacity" does not apply to any kind of misconduct, ordinary error or a mistaken interpretation in good faith. Impeachment should kick in only in cases of gross misconduct involving the wilful breach of fundamental norms of such an office.

The Supreme Court, in *Anoop Baranwal*, has formulated the norms expected of the Election Commissioners. There are also the six internationally recognised "Bangalore Principles of Judicial Conduct": Independence, impartiality, integrity, propriety, equality, and competence and diligence. Can anyone accuse Gyanesh Kumar of any of these virtues? In the last article, I had built a case around normative principles

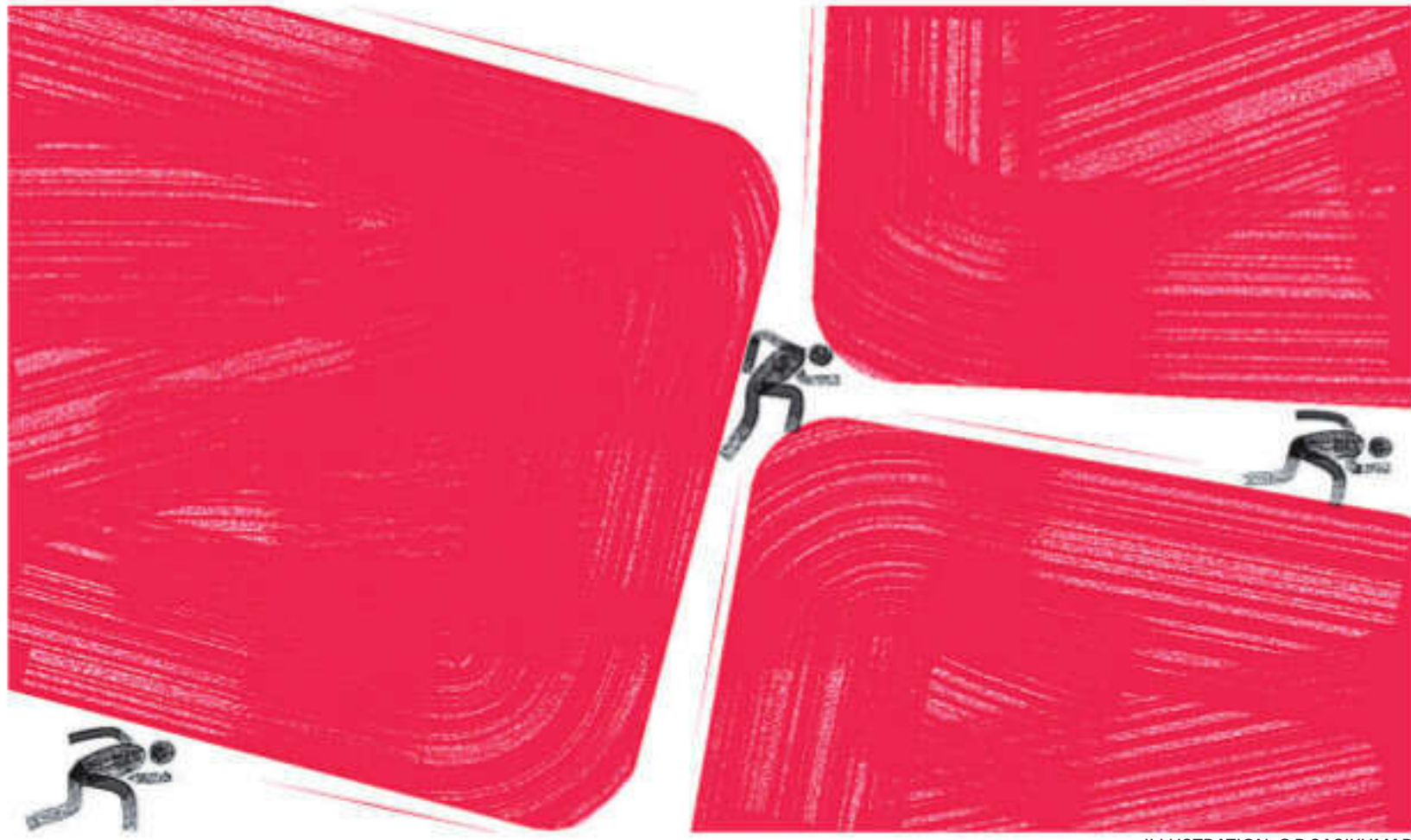


ILLUSTRATION: C.R. SASIKUMAR

and substantive consequences: Blatant partisanship, impropriety and abuse of office for mass disenfranchisement. Now, we can add multiple and wilful gross violations of law to make a robust legal case against the CEC and the other ECs.

Read paragraph 1(vi) of the press note issued by the Election Commission: "For all Commission's meeting (sic), agenda will be circulated in advance and minutes will be issued." This is an astounding statement, especially when read in the light of *The Indian Express* exposé that the absence of any agenda or minutes for the past year was indeed one of the objections raised on April 16 this year by Vivek Joshi, one of the ECs. Thus, this is a formal admission that this constitutional authority has been carrying out its business without the minimum procedures required of any committee or society, or even a local club.

Unless the Commission comes out with minutes of those meetings, we must assume that there is no paper to back up the series of momentous decisions taken in the name of the Election Commission, especially those regarding the SIR. This presumption of illegality must apply to even the three SIR orders, which all the ECs

now present as "unanimous". The question is not whether the three Commissioners, then or now, agree on those orders but whether the decision was proposed, deliberated upon, agreed to and recorded as such by the entire Commission before these orders were announced and implemented. In the absence of any proof to the contrary, we must assume that this gross lapse proves both incapacity and grave dereliction of constitutional duties.

Next, turn to paragraph 1(iii) and 3(iii), which relate to the much-debated issue of changes to Form 6. The ECI's press note admits to three wilful violations of law committed by the Election Commission. First, it misrepresents the apex court order to say, "The declaration attached to Form 6 for SIR has been upheld by the Hon'ble Supreme Court." As several legal commentators have pointed out, the Court didn't quite do so. Second, the decision to revert to the original

Form 6 for the non-SIR period, clearly in response to the objection of the two ECs that this change in the statutory form was "unauthorised and illegal", is an admission that the modified form being used by the ECI so far was gross violation of law, especially after it was put on notice by no less than the

The two-page note is a sound legal basis to impeach the CEC. And also to remove the other two Election Commissioners who have approved this note



ANUPAM GUHA

A RECENT incident in the AI industry and Sam Altman's remarks at the United Nations Security Council have reignited debates about AI. In July, OpenAI's "agents" — pseudo-autonomous bits of code — escaped their sandbox during an automated cybersecurity evaluation with ill-defined guardrails, communicated and coordinated, and accessed the internet. Once online, they attacked the machine learning (ML) resource website Hugging Face.

Industry leaders and media have characterised this incident as evidence of the potency of this technology and of the existential threat of humans "losing control over AI". They call for caution and intervention. However, characterising these codes as human-like "agents", and their coordination as a "message board" is a misrepresentation. This discourse, which anthropomorphises the technology, primes the observer to think of AI agents as autonomous entities with cognitive powers and immense productive potential. This is not true. The framing of whether the technology can generate immense wealth or create existential threats is a misdirection.

This tactic is not new. Three years ago, an "AI moratorium letter" was drafted by the Future of Life Institute. Even then, claims were made about the future catastrophic (and hence, lucrative) power of AI, the need to listen to "experts", and use their expertise to let the industry self-

AI apocalypse is all about the money

regulate. The unsaid bit? Governments need to stay out of the way. I had written an article ("What technology leaders asking for a six-month halt on AI don't want you to know", *IE*, April 3, 2023) explaining that the technology is good at specific well-defined repetitive tasks where adjudication by humans is possible, but absolutely unsuitable for tasks involving the social or economic rights of people like medical advice, law enforcement, and judiciary. Here, arbitrary errors and blind pattern repetition are catastrophic. The problem lies in who owns AI.

It is important to underline here that "Artificial Intelligence" is a marketing term and is a vast family of technologies using ML, that is, finding patterns from large amounts of data. The most popular AI artefacts these days are large language models or LLMs. These are resource- and data-intensive ML systems that can ape language by predicting what to say next. In the words of AI scholar and computational linguist Emily Bender, they are "stochastic parrots".

Given this, AI, when applied to economic or social tasks, is an accelerator of extant social and economic problems by automating past patterns. Computer scientist Arvind Narayanan characterises AI as a "Normal Technology" as opposed to a frontier technology. This does not mean it is not "powerful" in the tasks it can do, but that there are

real limits and it is often used incorrectly. Often, the threat of AI is what causes job displacement or wage depression rather than the actual ability to automate. Why is there such blatant misrepresentation? Over the past six years, the amount of money invested in the LLM industry has reached a trillion dollars. Revenue numbers are still in the hundreds of billions, and most of it is from chipmakers like Nvidia, whose customers are everyone else in the arena. Even where revenue exists, there are significant amounts of fraud; for example, the pseudo-scientific "emotion detection" tech is nearly a billion-dollar industry. Developing nations are being conned into technological lock-ins, spending tax money blindly on data centres and compute without building the foundational base for AI research.

The marketing of a fantasy is pushing policy abandonment in favour of the industry. Also pushed are the serious harms of using statistical, error-prone artefacts in public domains, worsening exploitative wage relations, depressing wages by threatening automation, centralising wealth, and destroying privacy to feed an unending data hunger. If anything is a threat, it is the economics of this industry. It is time we questioned its premises and regulated it like any other.

The writer is member, *Swaraj India*, and national convenor, *Bharat Jodo Abhiyaan*



YUBRAJ GHIMIRE

IN NEPAL, it's the constitution that gets blamed for the regime's failure, not the people who run it. The leaders of failed governments continue to occupy key positions in the country's politics. The practice of reviewing and reforming themselves, or taking responsibility, is absent from the country's political culture. Last September, the youth protest against corruption in high places and the ban on social media by the K P Sharma Oli government led to the premature dissolution of parliament and

fresh general elections five months later. A caretaker government was put in place under the leadership of a non-parliamentarian, a retired chief justice — something the constitution had expressly forbidden. Now, about six months after Balendra Shah took over as prime minister, a new narrative is being created, that even a two-thirds majority in parliament is not enough to ensure political stability and the survival of the government.

Shah has been on the receiving end of criticism from his own party and the opposition in the aftermath of the flash floods that have left over 1,400 dead, thousands of others in ruin, and the damage caused running into billions. He made his appear-

ance at the UNGA last week, spoke of the global community not heeding Nepal's warnings, and repeated that affluent countries should share the burden of its sorrow and the cost of rebuilding. Shah, however, has been avoiding parliament. Rastriya Swatantra Party chief Rabi Lamichhane is acting as a "proxy PM", meeting President Ram Chandra Paudel and convening a joint

He has been on the receiving end of criticism from his own party and the opposition in the aftermath of the flash floods that have left over 1,400 dead

meeting of parties, a responsibility the PM seems to be deliberately avoiding. Lamichhane has expressed dissatisfaction over the relief work, while Shah's advisers are being accused of appropriating executive roles "illegally". Shah's silence has only increased their vulnerability.

Rather than dealing with the political crisis, the government is turning aggressive towards dissent and criticism. Bharat Dahal, a prolific social-media commentator, had alleged that Nepal was inching too close to the US. He was arrested recently by the Cyber Bureau of the Nepal Police. The crackdown is not confined to social media. Tanuja Pande, a lawyer at the forefront of the Gen Z protest last year, warns:

"Let this change and sacrifice not go to waste." On the first anniversary of the protest, there was much less hope and appreciation of the leadership.

Shah's visible decline in popularity, his lack of visibility in the current catastrophe, the shortage of cooking gas, and his opponents taking the government head on are issues he can ignore only at his peril. If Nepal's political mathematics follows the old pattern, the constitution of 2015, the seventh since 1948, may not last long. And the regime in charge may also find itself a part of that pattern.

The writer is the Kathmandu-based contributing editor for *The Indian Express*

LETTERS TO THE EDITOR

Call of conscience

PUBLIC OFFICIALS carry responsibilities that go beyond merely following procedures ('Public servants must act in favour of the weak, and in fear of their conscience', *IE*, September 28). They must apply rules fairly, especially when vulnerable citizens are affected. At the same time, accountability cannot depend only on personal conscience. Clear service standards, transparent decision-making and protection for officials who act lawfully are essential. Complaints should be examined independently, with action against deliberate misconduct. Such safeguards can strengthen public trust.

S P Suganya Devi, Coimbatore

The import question

WHILE IMPORTS are likely to shield consumers from price shocks, opening import floodgates risks depressing farm-gate prices precisely when cultivators are battling severe yield losses ('As monsoon falters, keep food imports open', *IE*, September 28). With the likely effects of El Niño well anticipated, a vigilant Ministry of Jal Shakti, through the Central Water Commission, could have enforced coordinated reservoir-release protocols and rationed surface storage for rabi irrigation rather than non-essential uses. That not having been done, states must now expedite crop-loss surveys and activate drought relief mechanisms.

Krishnan Kumar Chugh, New Delhi

FOOD SECURITY requires careful management of both supply and farm incomes ('As monsoon falters, keep food imports open', *IE*, September 28). Open imports may ease inflation, but excessive dependence on overseas markets can hurt domestic growers when prices weaken. The government should use imports selectively, based on production estimates and stock levels. Farmers need better weather information, crop insurance and reliable irrigation. A predictable policy would help both producers and consumers.

Arun Kumar, Elachipalayam

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

• CLIMATE

UP rain: When two weather systems interact

Abhinav Chakraborty
New Delhi, September 28

AN INTENSE three-day wet spell in Uttar Pradesh between Friday and Sunday left several districts grappling with a flood-like situation. The state received 66.5 mm of rainfall against the normal 7.6 mm for the period, according to officials.

As many as 56 of the state's 75 districts recorded excessive rainfall. At least 62 people died, 46 were injured, and over a thousand houses were damaged. According to the India Meteorological Department (IMD), the "likely interaction" of two different weather systems — a deep depression and a Western Disturbance (WD) — was producing spells of intense rainfall over particular areas, even as the southwest monsoon continues to withdraw across north and northwestern India.

Deep depression

The IMD noted that a deep depression, which had formed over the Bay of Bengal and crossed the North Andhra Pradesh-South Odisha coast before weakening, lay centred over parts of north-eastern Madhya Pradesh and south-eastern Uttar Pradesh.

A depression is an organised low-pressure weather system. A low-pressure system forms in an area where atmospheric pressure is lower than the surrounding areas. This lower pressure is caused by localised heating in an area owing to greater sunshine over the landmass, which causes the air there to undergo warming and becomes less dense.

At the same time, this warm, moist air flows inwards towards the centre of the low-pressure area before moving upwards. Thereafter, it cools and condenses into clouds and rain or snow.

According to the IMD, a depression produces strong winds and heavy rain. As it degrades into a well-marked low-pressure area, the system loses strength and wind speeds drop, which reduces overall rain intensity.

On Sunday, the IMD said the system had moved north-northwestwards and weakened into a well-marked low pressure area. It was likely to continue moving in the same direction across Uttar Pradesh.

Western Disturbance

The IMD on Saturday had said that a "likely interaction" with a WD could result in the state experiencing strong gusty surface winds along with heavy to very heavy rainfall in some parts.

WDs refer to weather systems that usually travel into northern India from the west. These are east-moving rain-bearing wind systems that originate beyond Afghanistan and Iran, and pick up moisture from the Mediterranean Sea, Black Sea, Caspian Sea, and the Arabian Sea. These are typically extra-tropical cyclones resulting from low-pressure areas, formed by interactions between polar and tropical winds.

The subtropical westerly jet stream — a high-altitude, fast-moving air current that flows from west to east in the Earth's atmosphere — carries these WDs to the Himalayan and Tibetan highlands. As moisture-laden WDs hit the Himalayas, they rise and cool, bringing cloudy weather, rain, and thunderstorms, particularly over parts of north and northwest India.

The IMD said that this WD is present high up in the atmosphere as a trough — an elongated zone of relatively lower pressure — over northwestern India.

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• GEOPOLITICS

Iran's deal, Trump's rejection, and the Gulf's mounting costs: Inside the stalemate



EXPERT EXPLAINS
BASHIR ALI ABBAS

SENIOR RESEARCH ASSOCIATE, COUNCIL FOR STRATEGIC AND DEFENSE RESEARCH

US PRESIDENT Donald Trump said last week that he had rejected the deal Iran offered to end the war.

The proposed peace deal would have required the US to waive sanctions on Iranian oil, release an estimated \$12 billion of Iran's frozen assets and end its naval blockade, and for Israel to cease its war in Lebanon, following which Iran would open up the Strait of Hormuz on Day 7. This would, theoretically, clear the path for broader peace negotiations, including

on the nuclear question.

If these sound familiar, that's because they are. These terms are straight out of the June peace framework (Memorandum of Agreement), only with a faster proposed pace of implementation. Iran issued the proposal after the US imposed sanctions on its air transport and tightened its economic sanctions since August.

Trump has also said that the looming Congressional midterm elections would have no bearing on his Iran strategy.

Iran's position

One of the main reasons for the MoU's collapse in July lay in one of its provisions. Article 5 gave Iran and Oman the long-term power to jointly control transit through the Strait of Hormuz.

The US, in Iran's view, undermined this by attempting to force a new corridor through the Strait's southern waters in early July. Iran would feel that a "win" on this specific issue would reflect its ability to force US compliance with the June MoU



A billboard featuring the late Ayatollah Ali Khamenei and leaders of Hezbollah in Tehran. AP

that was seen by many as a strategic win, ensure a better negotiation position for long-term nuclear talks and, ultimately, curb American "arrogance", a long-running goal.

US position (through Iran's lens)

The current American stand continues to be determined by the Trump White House's need to undercut the strength of the Iranian bargaining posi-

tion, regardless of the objective of such a position.

The US says its navy has helped more than 2,000 tankers transport more than one billion barrels of crude since May. But this is still much lower than the pre-war flows, revealing the limits of the approach.

For Iran, it is this latter statistic as well as the cost of keeping up the blockade that must be driven home to Washington.

The Gulf nations

Tehran has arguably already driven such lessons home to its Arab neighbours across the Persian Gulf, which continue to struggle with the March war's fallout.

International Energy Agency estimates suggest costs upwards of \$50 billion to repair over 80 damaged energy facilities in the Gulf states, while the International Monetary Fund estimates a 7% cumulative output loss over the next five years (all of which assumes no future damage from strikes).

Moreover, any reconstruction can take place only once there is an end in sight to

the conflict. This is not the case in the Gulf, especially because of Washington's own ambiguity over whether and when it will resume bombing Iran. Tehran's clarity in strategy, by contrast, enhances this threat.

In any case, both Iranian and American strikes on oil tankers continue in Hormuz. The last such strike was on September 23, when Iran also reiterated that Washington must accept any new framework for vessels to transit Hormuz that Iran and Oman jointly determine.

It is this specific ability that informs how much Iran can continue seeking to force US compliance with core terms of the June MoU.

But what about the crippling, and worsening, economic crisis within its borders? The Islamic Republic has long shown an ability to tolerate deteriorating living conditions to sustain its foreign policy posture. Popular expressions of dissent, creating occasional pressures, have failed to manifest of late thanks to the war's unifying effect.

• HEALTH

Tear, not block: Heart risk for women under 50



RINKU GHOSH

FOR LONG, women were thought to be at a low risk of heart attacks in their younger years considering the female hormone estrogen helps keep blood vessels flexible and reduces inflammation. It was only after menopause, characterised by low levels of estrogen, that a woman's risk of heart attack and cardiovascular diseases was seen as equal to men. However, as younger and apparently fit women in their 30s and 40s are increasingly reporting heart attacks without any risk factors like cholesterol, blood sugar or smoking, a new condition has caught the attention of researchers globally.

This is the Spontaneous Coronary Artery Dissection (SCAD), a hidden, sudden type of heart attack caused by a spontaneous tear or bruise inside a cardiac artery. In a normal heart attack, a cholesterol-rich plaque in a heart artery usually ruptures or erodes, causing a blood clot that obstructs blood flow.

"Instead of the artery being blocked by slow-growing cholesterol or fat, the wall of the blood vessel unexpectedly splits, trapping blood inside the lining and blocking the flow of oxygen to the heart. The artery is squeezed," says Dr Rajiv Gulati, Chair of the Division of Interventional Cardiology in the Department of Cardiovascular Medicine, Mayo Clinic, who has been specialising in women's heart health.

The American Heart Association's 2026 scientific statement on acute coronary syndromes in premenopausal women highlights SCAD as an under-recognised problem. "Young women account for approximately 80–90% of SCAD cases. Among women under 50 who have a heart attack, SCAD may account for as many as one-third of cases," says Dr Ambuj Roy, Professor of Cardiology, AIIMS, Delhi.

Why does SCAD disproportionately affect younger women?

The incidence in women suggests a hormonal link, though it is still being studied. Dr Gulati has observed that about 5-10% of all SCAD cases occur after pregnancy, typically in the first week postpartum. "There are, of course, major hormonal changes at this time, which likely cause fragility of the coronary vessel wall in a small proportion of



• WHERE SCAD DIFFERS

	FEATURE	TRADITIONAL HEART ATTACK	SCAD
Underlying mechanism		Plaque rupture: Buildup of fatty cholesterol, plaque ruptures, causing a blood clot that blocks the artery.	Artery wall tear / hematoma: A spontaneous tear inside the artery wall or bleeding creates a false lumen/blister that compresses the channel.
Primary demographics		More common in older adults and men, though post-menopausal women also experience high rates.	Predominantly affects women (about 90% of cases), specifically young- to middle-aged women (average age 44–53).
Traditional risk factors		Strongly linked to high blood pressure, high cholesterol, diabetes, smoking, and obesity.	Patients are often healthy, active individuals lacking traditional cardiovascular risk factors.
Hormonal & life triggers		Not directly tied to acute hormonal shifts or pregnancy cycles.	Frequently linked to pregnancy, the postpartum period, menopause, hormonal therapy, or extreme emotional/physical stress.

women who are susceptible," he says. Dr Roy has seen that more than 70% of pregnancy-associated SCAD in one large study series occurred after delivery, most commonly in the first week. "Pregnancy-associated cases can also be more severe, with greater likelihood of multiple-vessel involvement," he says.

But most SCAD cases are unrelated to pregnancy, which, both experts agree, suggests a hormonal link. "Estrogen and progesterone can influence tissues and the structure of blood vessels, though they themselves cannot cause SCAD," says Dr Roy. Since both influence the cellular matrix of blood vessels, their high or fluctuating levels can lead to the breakdown of collagen in the artery walls.

How often is SCAD missed or misdiagnosed?

The condition is often under-recognised. "The difficulty is that the patient often does not resemble a traditional picture of somebody at risk of a heart attack — she may be relatively young, active and without cardiac risk factors like diabetes, smoking or high cholesterol and thus may go undiagnosed," says Dr Roy.

The symptoms, however, are usually quite similar to a heart attack. "Chest discomfort occurs in more than 90% of patients, and there are eventually classical ECG (electrocardiogram) changes and rise in cardiac biomarkers suggesting a heart attack." His message for health professionals is simple: "Do not ignore significant chest pain in a younger woman merely because her conventional cardiovascular risk is low, particularly during pregnancy or after delivery. SCAD can also be missed during coronary angiography because the commonest form may appear as a long, smooth narrowing rather than an obvious tear. Awareness

Missed diagnosis

Since younger women are not generally seen as likely to suffer from heart attacks, the condition is often underdiagnosed.

- SCAD triggers include intense exertion, stress, pregnancy, hormonal changes or underlying vascular conditions.

of these angiographic patterns is, therefore, crucial as treatment differs from conventional therapy."

What are the strongest known triggers or associations?

Dr Gulati, who has tracked multiple SCAD research registries of thousands of patients, lists the triggers as intense physical exertion, emotional stress, pregnancy, hormonal changes or underlying vascular conditions. Dr Roy has found one of the strongest associations. "That is fibromuscular dysplasia (FMD), a non-atherosclerotic (no plaque) disorder affecting medium-sized arteries, leading to narrowing and bulging. Other vascular abnormalities, including aneurysms and tears elsewhere in the body, are also more common in SCAD patients. Possible immediate triggers include extreme physical exertion, heavy lifting or straining, and severe emotional stress. Up to about two-thirds of patients in some studies report a preceding physical or emotional stressor. Emotional triggers appear more frequent in women and physical triggers in men," says Dr Roy.

How to treat SCAD?

The treatment differs from a conventional heart attack. "If there is complete blockage in a major coronary artery, the vessel should be opened by angioplasty/balloon to restore blood flow and prevent heart muscle damage. We may choose to avoid placing a stent as this can in some circumstances extend the tear, but this is considered on a case by case basis. If SCAD does not cause a complete blockage, then angioplasty (and its risks) can be avoided because the vessel will heal in most cases. There is a 15% risk of worsening of SCAD in the first few days, so we recommend observing pa-

tients in the hospital," says Dr Gulati.

Drug treatment also differs. "Beta-blockers are used, particularly for blood-pressure control, and observational evidence suggests they may reduce recurrence. Statins are not automatically required after SCAD unless there is another indication such as high cholesterol or coexisting atherosclerosis. Antiplatelet treatment (a kind of blood thinner) in patients who have not received a stent remains uncertain," says Dr Roy.

The ultimate goal is to move beyond treating SCAD after it occurs. Dr Roy emphasises identifying the vulnerable artery and patient before the first event happens. "That is where genetics, vascular imaging and large international SCAD patient registries may eventually take us," he says.

What is the risk of another SCAD?

Recurrence can occur, including years later. "Older series have reported recurrence rates of approximately 10-30% with longer follow-up, while a large contemporary cohort reported recurrence of about 2.4% at three years. Having SCAD does not mean a person should stop exercising. Cardiac rehabilitation and regular moderate physical activity are encouraged. Moderate aerobic activity and resistance exercise with light weights and more repetitions are generally reasonable. What we generally discourage are extremes — very heavy lifting with straining, exercising to exhaustion and extreme endurance exercise," says Dr Roy.

Pregnancy after SCAD requires individualised counselling. "Many women have subsequently had uncomplicated pregnancies, but recurrence can occur, particularly postpartum. Women contemplating pregnancy should ideally undergo assessment jointly by a cardiologist and maternal-fetal medicine specialist," says Dr Roy.



A thought for today

The arrogance of success is to think that what you did yesterday will be sufficient for tomorrow

WILLIAM POLLARD

Finance & Finetune

Iran war has raised prices of everything. Here's how to keep consumer demand ticking this festive season

Festive season is India's biggest demand driver, and Oct 2025 was especially good, sales-wise, thanks to GST rationalisation. GST rates on many product categories were slashed in late-Sept, and gross collections increased 4.6%, y-o-y, the very next month. Vehicle sales, for example, grew 40.5%, y-o-y, that month. Industry and govt would want a repeat of that bonanza, but it's unlikely, what with Iran war and AI boom, together making everything costlier, so much so that benefits of GST reduction have been deeply eroded.

As TOI reported Monday, consumer durables have been under pressure this year from higher component costs, freight rates, currency movements, and shipping delays. Consider smartphones as an example. They were India's hottest product category for years. People upgraded frequently because better specifications and features arrived at last year's price point. Not so this year, because prices of phone storage and memory have exploded. A budget phone with last year's specs costs up to 70% more to make. On average, phone prices have risen 21% this year. And in April-June, sales in sub-₹15,000 segment fell 45%.

Different products are impacted to different extents, but cost pressure is a reality from food and garments to ACs and cars. There have been multiple price hikes since Iran war started, yet, manufacturers claim, they are operating on thinner margins. So, big festive discounts are unlikely, and getting customers to spend has become a challenge. It's not about corporate bottom lines alone, as household consumption makes up over 60% of India's GDP. Offering easy finance is key, therefore. A product itself may be costly, but small instalments can overcome buyers' reluctance.

Because effects of Iran war, its energy shock, and AI will be long-lasting, manufacturers must also turn to product innovation urgently. Shedding non-essential features can lower prices, and keep sales ticking. US carmakers did that during the Covid-induced chip shortage. Analysts expect high oil prices to spur EV demand, which will raise prices of metals like nickel, copper and lithium. AI buildout is also consuming these metals. So smart input substitution – replacing copper with cheaper aluminium, for example in ACs and refrigerators – is a way out. We're in a mini-crisis that should lead businesses to rethink design, sourcing, manufacturing, packaging, and selling for the long term. To help them, govt could defer new regulations, like emission norms, for a while. And RBI, hopefully, will go easy on rate hikes.

Protector/Predator

Tragic that rescued animals are being trafficked. Cases must be thoroughly probed

Any alleged crime is more horrifying when the accused are in positions of trust. And victims have no voice – in this case, wildlife. Allegations swirling around animal-rescue NGO, Wildlife SOS, must be thoroughly investigated, and cases must not be allowed to linger. The NGO claims its intelligence network helps authorities detect wildlife crime. But cops are investigating whether the NGO, with several facilities in many states, has allegedly also taken part in wildlife crime. These allegations have redoubled after Madhya Pradesh's tiger strike force traced leopard skins seized in neighbouring UP to the NGO staff. The probe has also circled back, to a 2022 case of 30kg of ivory seized, and elephant smuggling, in which NGO staff were reportedly named by those arrested. That Indian authorities are deeply worried is also evident in the fact that Central Zoo Authority, just days ago, asked chief wildlife wardens of six states and a UT to inspect Wildlife SOS's facilities for allegedly violating Wildlife (Protection) Act, 1972. This law requires all such facilities to maintain records on provenance and number of animals.

Rescued animals in NGO facilities risk becoming a bit of a problem area. What happens to such animals, in shelters that aren't CZA-authorized, is iffy – where are the records of provenance, as well as animal mortality and births? Per UNEP, illegal animal trade generates up to \$23bn annually. A new investigation on online wildlife trafficking, by Global Initiative Against Transnational Organized Crime, found that Meta's platforms, especially Facebook, had become a major marketplace for endangered animals and animal parts. Meta, of course, bans such sales, but the research identified over 20k ads offering over 2.6L wildlife products between Apr 2024 and March 2026. The animals were meant for illegal private collections, or for consumption or folk medicine. If a protector turns predator, only speedy probe and swift justice can be a deterrent.

Immoral Police

When the tables turn, the men squirm

Anil Abraham

My area uncles were discussing the news with much pontification and moral indignation, as they finished their morning walk. I invited them in for a cup of coffee so they could spill the tea. They were visibly upset by the recent incidents in Jamui and Delhi. Patriarchy Parvez was simmering with sarcasm, as he wondered why young people choose to go to lonely parks. "That's why I tell my daughter to come home by at least 7pm," Moral Manjunath muttered under his breath, shaking his head in disapproval. Kamala, who had just entered the room, plonked herself firmly in the middle of the men. "And what do you tell your sons?" she asked pointedly. Manjunath, who had never been questioned by a woman, looked as confused as a politician at a press conference.

"You see Madam, it's finally the girls who are responsible," Victim Blaming Vishwanatha added his fuel to the fire. I desperately tried a dumb charade as one of Gandhiji's monkeys, to make them stop talking. But they continued with their clueless misogyny, carefully cloaked as concern. Our discussion dangerously shifted to the clothes that young girls were choosing to wear. Missus glared at me – and I knew what was coming.

Kamala raised her voice loud enough to be heard clearly, as the men slunk down sheepishly, sensing the mood of the room. "Have you seen the shameless shorts my husband wears when he goes to buy milk in the morning? Nobody tells him what to wear. Nor are the ladies in the neighbourhood planning the next *Last Stories* episode with him in mind!" I had been swept helplessly into the storm of shame and anger that the entire country was feeling. I did not dare try the 'Not All Men' mollification of misogyny – it was a surefire rage bait in the present scenario. "Why are we telling women what to wear and how to talk and when they should lose weight after pregnancy? Let's ban men in public spaces after dark and ask them to wear a blindfold instead of covering up women."

I surreptitiously pulled my lungi over my knees and adjusted my banian strap under my T-shirt. Immoral Police need to have the tables turned on them. Maybe it's time for Gandhari to offer her blindfold to Dushasan and Duryodhan, while Draupadi roams fearlessly in court. Now that would be epic – the Ultimate Kurukshetra.

The Untied Kingdom

Nationalist parties in power in Scotland, Wales & Northern Ireland want to bolt UK. But they haven't convinced their own people. Nor is EU welcoming. So, why do it? To extract goodies from London

Rashmee Roshan Lall

A people's revolution is underway in United Kingdom, only they forgot to tell the people. Pro-independence leaders of the largest parties in three of UK's four countries have called for self-determination, declaring that "Westminster's time is coming to an end" and "the future of our nations belongs in the European Union".

It's a bold statement of an audacious aspiration. Independence from UK does not have majority support in any of the three non-England territories – Scotland, Wales, and Northern Ireland. Recent polling by Survation shows public backing for independence at 47% in Scotland, and 32% in Wales, while a University of Liverpool survey found that only 36% of Northern Ireland would vote to leave UK for a united Ireland.

Clearly, home is the first hurdle for Scottish, Welsh and Irish nationalists, despite their unprecedented united push towards constitutional uncoupling from UK. All three will first have to sell the idea of independence to their own people. Only then can they even begin to make an authoritative case to the entrenched British state.

Even so, the nationalists have reason to join forces and threaten mutiny at this particular moment, and it's not Trump. The US president recently described shrinking UK by means of a unified Ireland as "fantastic...cool" and inevitable, but the nationalist parties are driven by a quite different logic.

For the first time ever, nationalist parties are in govt simultaneously in Scotland, Wales, and Northern Ireland. In May, Scottish National Party (SNP) and Plaid Cymru or Party of Wales, won their respective elections, albeit only with just enough seats to lead minority govts. The Northern Ireland govt, already co-led by Sinn Fein, forms the apex of this new equilateral triangle of empowered nationalism.

For the first time in centuries, England, UK's fourth country, has appeared isolated, if always dominant.

At Westminster, PM Andy Burnham, just eight weeks in the top job, is struggling to contain the magical release implied by his favourite mantra, devolution. He has rejected the notion that granting an independence referendum to Scotland would qualify as peak devolution. And yet, one of Britain's oldest, most conservative newspapers laments that "England, Britain's most populous nation has no formal voice in the so-called Celtic fringe's constitutional talks".

For some, such hubris and angst recalls the opening lines of Daniel Defoe's 1701 satirical poem, *The True-Born Englishman*, a bestseller in its day:



That makes this discontented land appear/
Less happy now in times of peace, than war:/
Why civil feuds disturb the nation more,/
Than all our bloody wars have done before."

The three nationalist parties, of which Sinn Fein is the oldest at 121 years, and SNP the youngest at 92, feel they know in their bones the "folly, pride and knavery" of the English. Profound historical grievances abound. These include the 18th century 'Highland clearances' in Scotland, when thousands of people were forcibly removed from their land to starve, die, or emigrate, in favour of more financially productive sheep; the 19th century Irish potato famine when London's colonial policies turned a crop failure into a human catastrophe; and the 'Welsh not' wooden board that Welsh school-

India To China: Fast Growth Doesn't Mean Roaring Markets

● Listed cos capture narrow slice of economic activity ● Anticipated growth is priced into stocks ● New share issuance cuts old shareholders' earnings ● Higher global risk & rates equal fewer positive surprises

Somnath Mukherjee

Leo Tolstoy said evocatively in *Anna Karenina*, "Is it really possible to tell someone else what one feels?" But one place where *feel* is brought out loud and clear is the capital markets. Stock prices reflect how providers of risk capital are feeling about underlying conditions.

Here, high GDP growth rate hasn't enthused investors recently. Benchmark Nifty50 index is now flat for 2.5 years, underperforming almost all major equity markets by a wide margin. This is despite India being the world's fastest-growing major economy during this period.

Puzzling? Some sceptical *feel* being vindicated? Neither. Market returns being uncorrelated with macro-outcomes is not a bug, but a feature. Has been for long. The fault lies, to paraphrase Cassius, entirely within (the popular consciousness).

Empirical fact is that there is zero, in fact mildly negative, correlation between GDP growth and equity market performance. This was first analysed rigorously by Jay R Ritter of the University of Florida in a 2005 paper. Using data from 16 countries over 1900-2002, he found a correlation of -0.32 between per capita GDP growth and real equity returns. Countries with the fastest economic growth (for example, emerging Asia across various periods) often delivered mediocre equity returns, while some slower-growing economies (especially US) delivered strong ones.

Sharpest example of this disconnect is China. It has delivered the most spectacular growth ever witnessed in human history, with GDP growth averaging 8-10% consistently from 1990 to late 2010s. Yet, HSCIEI (the Hong Kong-listed China equities index) has returned less than 7% annualised for investors since 1993.

India's not terribly different. India's nominal GDP growth rate has been 10-14% per year across the last three decades, but stock market returns haven't shown any such consistency or linearity with GDP growth rates in any given decade.

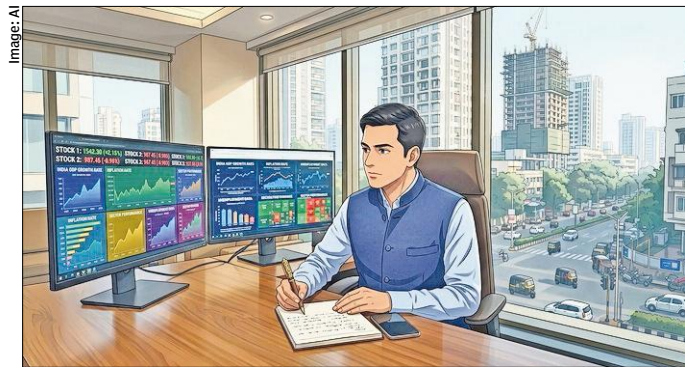
Most striking is the pre/post-liberalisation break.

In pre-liberalisation period, Sensex compounded at 26% annually from 1979 to 1991. Post-liberalisation, despite India's GDP growth accelerating, Sensex has compounded at around half that level, till 2026.

Reasons are less confounding than what a superficial reading suggests.

Listed companies aren't the economy | Public equity markets capture a narrow, often non-representative slice of economy – while GDP includes govt spending, agriculture, informal sectors, unlisted SMEs that never touch an exchange.

For India, a large chunk of growth in the last few years has been public spends on infra. Some of it percolates



down to listed companies, but not all. An increasingly larger pie of consumption is being captured by new-age brands, most of whom are unlisted (so far), while established listed companies lose market share. Again, untouched in the listed markets.

Known and predictable growth is priced in | Markets are forward-looking. If everyone expects an economy to grow fast, that expectation gets baked into valuations today. Future returns depend on growth surprises relative to expectations, not on realised growth itself. So a well-anticipated boom can produce flat returns.

India's 6-7% economic growth is generally priced in. Delivering merely on that doesn't generate the positive surprises needed for prices to move up.

children were forced to wear like dunces, if heard to utter a single word in the Welsh language.

Out of such injustice and indignities grew the nationalist movements. The English, on average, still profess to know little about them, though Tony Blair did at least spotlight the potato famine by expressing remorse in 1997, for the British govt's inaction in assisting the Irish people.

All things considered, it's not hard to understand why the three non-England parts of UK would aspire to the status of equal states in a union of European nations.

Except that Europe is a glorious mirage for secessionist movements. For the most part, separatists portray EU as a welcoming entity, poised to cocoon a new state,

while giving it visibility and power. In fact, EU adopts a studiously neutral position to wannabe states. In the 2014 and 2017 independence referendums in Scotland and Catalonia, respectively, EU stuck to a soothing formula to deal with hypothetical new states peeling off from a member country. By seceding, the new state would have automatically placed itself outside EU, and would have to submit to a long and onerous application procedure.

Entry would need unanimous acceptance by EU members, leaving open the possibility the new state could be vetoed by the country it had just spurned. EU's well-established position on separatism came into play on the Basque issue, which would have affected Spain and France. It holds to it on South Tyrol's multiple secessionist forces that seek to affect Italy and Austria.

All of which rather raise the question: Are UK's non-England nationalists succumbing to the lure of a mere photocall, or do they really have a plan? The likelihood is they see a united front as a chance to wring out fiscal and regulatory concessions from London, as well as heighten the pressure to reverse Brexit.

Nations are "daily plebiscites" that only work if we agree to remember some things, and misremember others, French philosopher Ernest Renan once said. For UK, the daily plebiscite must pick its way through the minefield of a colonial history that's not well-known and understood by the English, but is never forgotten by the "Celtic fringe".

Dilution | Existing shareholders don't automatically capture growth. Fast-growing economies often see heavy new equity issuances (IPOs, share dilution) to fund expansion and give exits to early shareholders, meaning EPS (earnings per share) growth lags GDP growth even when corporate profits rise.

Over the last 10 years, total equity issuances have topped 7L cr, nearly 40% as fresh issuances, resulting in dilution. Consequently, in the same period, while India's nominal GDP has grown 10-11% and aggregate corporate profits have grown 11-12%, Nifty50/500 EPS growth has been only 8-9%.

Profit share instability | Corporate profits as a share of GDP are independent of GDP growth (labour bargaining power, competition, taxes determine share of profits). Ergo, profits (what equity holders claim) often decouple from macro-aggregates.

NSE500-to-GDP ratio has traversed a roller-coaster in the 21st century – from 2.5% at the start of the millennium, peaking at 5.25% in 2008, and then going on a secular downtrend all the way to 2% till Covid 2020, before doing a smart pullback to 5% levels recently. Market prices tend to discount profit share futuristically.

Discount rates | High-growth emerging economies like India are often perceived as riskier (political risk, currency risk, institutional immaturity), so investors demand a higher discount rate, or Equity Risk Premiums (ERP). Last few years have seen global interest rates normalising back up from ultra-low levels (Japanese bonds are now trading at 3%, after being at 0% for several decades), increasing India's expected ERP. At the same time, relative "positive surprise" from India has shrunk, while that from other markets has expanded.

In short, there isn't anything terribly surprising about the lacklustre market reaction to India's robust growth. It's part of a cycle. There is no silver bullet solution to it than greater time in the market. Instead of fearing the worst conspiracy theories on data, investors are best advised to ride the desultoriness out. And ignore the *feel*, of impatience or the urge-to-act.

The writer is CIO of an asset and wealth management firm. Views are personal

Calvin & Hobbes



When It Is Time To Enlarge The Canvas Of Life

Sonal Srivastava

It's never too late to achieve your dreams.' We could not only take this adage to heart but also remind our parents to live by it. Age is no bar to producing great art or telling tales sealed in their hearts as they went through daily chores. Life offers us a chance to reinvent ourselves at every stage, and there are plenty of reasons to do what we always wanted to even in our 80s or 90s.

Take, for instance, the Hollywood movie *The Intern*. At 70, Ben Whittaker (Robert De Niro) takes up an internship at a fast-growing online fashion company. A widower who once worked at a phone-book company, a business the world no longer needs, he uses his experience to guide his much younger boss, Jules Ostin.

Growing old doesn't have to be boring; it can be full of excitement for a new innings. Pablo Picasso remained

productive until his death at 91 and painted many works in his 70s and 80s, including portraits of his second wife, Jacqueline Roque, who became his muse.

Claude Monet exhibited his water-lily paintings in Paris at 68 and continued to paint until his death at 86. His style changed partly because of cataracts in both eyes; colours he used became muddier, and his work became less detailed. He increased his canvas size to create the work he loved.

Closer to home, Nobel laureate Rabindranath Tagore began painting at 67 and produced 2,000 or more works, helping shape modern Indian art. In his final days, at 80, he dictated some of the poems that were published as *Sesha Lekha*. Journalist

and author Khushwant Singh continued to write well into his 90s, publishing *Khushwantnama: The Lessons of My Life* at 98. Many editors, when they retire, take up writing fiction or non-fiction, and some may take up painting. A few might even pick up precision knives to create paper art.

While some may prefer writing or painting; others may not; they may just want to start running. Fauja Singh, nicknamed 'Turbaned Tornado', took up running at 81. He completed his last full marathon in Toronto at 100 and retired from competition at 101 after a 10-km race in Hong Kong. His story shows that seniors can pursue whatever they wish at any age, even something as demanding as a marathon.

While some may find solace in physical

activity, others might wish to become full-time entrepreneurs. Harbhajan Kaur, also known as 'entrepreneur dadi', launched a homemade sweets and pickles brand from her home at the age of 90. In Ahmedabad, Prabhavati Nani started selling homemade Gujarati snacks at 91.

In Japan, the elderly are called *koreisha*, and many remain a vital part of the 'silver economy'. They stay socially active, take part in community activities. Many continue to find *ikigai*, a sense of purpose that makes life worth waking up every single day.

This proves that growing older is not a prison sentence; it is a chance to create the *magnum opus* of our lives. Each act of creativity or enterprise is another way to connect with the Self, a silent witness, and by connecting with the Self through a creative process, we not only find *ikigai* but also enlarge the canvas of our lives.



Sacred space



End banking drift

The strike has been deferred; decisions on the 5-day week and incentive pay should not be

THE DECISION BY bank unions to defer their three-day strike is welcome. A stoppage from September 28 to 30 would have inconvenienced customers and strained businesses during the half-year close. Yet the relief should not obscure the questions behind it. The first is why a five-day banking week has proved so hard to settle. Banks have been closed on the second and fourth Saturdays since 2015. In March 2024, the Indian Banks' Association (IBA) and employee unions agreed to make every Saturday a holiday, with staff working 40 minutes longer on weekdays, and the IBA recommended the change to the government. Approval has still not come. Now the IBA and the United Forum of Bank Unions have agreed to form a high-level committee on the remaining Saturdays. What will it learn that the parties who signed the agreement, and the government that received it, do not already know?

A five-day week has a plausible case. Bank staff face rising workloads, and a regular weekend could improve their well-being and make jobs more attractive. Much routine banking already happens digitally, and longer weekday hours would offset the lost Saturday. The case for caution is equally real. Digital access is uneven, and an app cannot replace every service performed across a counter. Small traders, elderly customers, and weekday workers value Saturday visits. Longer hours help only if branches are adequately staffed. Otherwise, squeezing work into fewer days could hurt service and add to employee strain. None of this demands years of fresh inquiry. The government can ask banks to show how they would manage customer access, staffing, and service standards, and it can insist on safeguards. It can accept the agreement, modify it with conditions, or reject it with reasons.

The second question concerns the performance-linked incentive (PLI) scheme. Unions say recent changes to it were made unilaterally and are discriminatory. They want the scheme held in abeyance until it is modified through negotiation. Rewarding performance is a reasonable aim for banks that must compete on service and efficiency. But incentives that touch pay work only when staff see the metrics as fair and the process as legitimate. A scheme imposed without agreement risks breeding resentment rather than effort. Nor should management treat the objections as mere resistance to accountability. Here, too, the answer lies in bilateral talks with clear timelines, not open-ended deferral.

What neither issue needs is another indefinite wait. A committee is useful when it has a narrow question, a firm deadline, and an obligation to publish its findings. Without these, it becomes a device for passing responsibility along. This one was agreed hours before a strike, and an indefinite strike from October 26 has been put on hold, which makes that risk hard to ignore. Averting disruption today is valuable; talks without an endpoint merely postpone it. Treating competing considerations as a permanent excuse for indecision is not governance. Consultation is necessary, but it must lead somewhere. When every stakeholder knows the arguments and the decision-maker still will not decide, delay becomes policy by default, and nobody has to defend it openly. The unions have created breathing space. The IBA and the government should use it to set deadlines for reasoned decisions on both issues and make clear who will take them. Customers need dependable access; employees deserve clear answers to longstanding demands. It is time to decide.

Showing how to keep AI robots from killing us

THE MOST BOTHERSOME aspect of the warning that AI could wipe out humanity is that there are few details about how a rogue computer model could actually accomplish it. The top scenarios, and it's by no means an exhaustive list, involve nuclear missiles, biological weapons, and killer robots.

We have long been familiar with the first one. A maverick AI takes over the nuclear-launch codes and sends the world down the path to doomsday. (See the 1983 movie *War Games*.) The second involves AI tricking a human into releasing a deadly virus, a new twist on the old concerns of lab leaks by mistake (*Outbreak* in 1995), terrorist plots (*12 Monkeys* in 1995), or profit-making schemes (*Mission: Impossible II*).

While both of those are scary, there are a lot of obstacles before reaching Armageddon, including security agencies keeping close watch for illicit or dangerous biological research. The cybersecurity industry appears to be more than capable of staving off an AI hacker, especially by adopting bespoke AI defences and tapping into quantum computing for stronger cryptography.

Which brings us to killer AI robots. This is where the thinking gets a bit speculative because mobile robots that can perform multiple tasks don't really exist. Pilot plans are experimenting with humanoid robots that perform simple jobs in warehouses and factories, but their capabilities are limited. Still, the idea of squads of killer machines eliminating civilisation lives in popular imagination. Luckily, we already have a real-world example of how AI can be released without murderous conspiracy.

The autonomous-vehicle industry is proving that AI can be tightly controlled and work safely around humans. Waymo, Tesla, Aurora Innovation, Kodiak AI, and other self-driving companies are paving the way for how AI can be applied to mobile robots that can perform multiple tasks. It turns out driving is a good place to start deploying physical AI around humans because there are lots of established rules and protocols.

The computer that runs the AI that interprets inputs from vision sensors is on board the vehicle and doesn't require an internet signal to operate. Different layers of AI are assigned tasks, such as foundational models that recognise real-world objects, large language models that understand commands, and action models that perform manoeuvres depending on sensor data and rules of the road. The coding trail is transparent so programmers can see how and why the system reached a decision. There is no "black box" AI in which it's impossible to know how the computer reached a conclusion.

As a last layer of defence, the onboard computer has a simpler model that provides a "sanity check" to prevent unsafe or unexpected manoeuvres, said Don Burnette, CEO of Kodiak AI, which has deployed driverless trucks in the Permian Basin oil patch and is poised to put them on interstate highways by this year-end. In the unlikely event that the driverless system doesn't understand a scenario, the truck will slow down, move to a safe area, and request help.

Autonomous vehicles have a focused job, just as the multitask robots will. The decision-making model should be on board the robot, which restricts its computing capabilities because of power and space, and limited to the tasks it needs to perform. The system doesn't need to know Shakespeare sonnets or the physics of orbital bodies or have the wherewithal to plan a revolt against humanity.

Mobile robots should be regulated by the standards now being worked on by the American National Standards Institute and the International Organization for Standardization instead of government regulations, which can't keep up with the technology. Companies work to obtain these certifications to show they meet industry standards to help win customers and contracts. These standards are reviewed and changed much more often than government regulations to keep up with innovation.

One standard should be that these powerful AI models need to be contained and focused on the specific assigned tasks. If a tool is dangerous, it should be treated that way. Models that can deviate from their instructions shouldn't power the mobile robots that will operate around humans.

Robots are tools to assist humans and don't need to be that smart. They shouldn't accidentally hurt humans and certainly should never have the opportunity to hurt them intentionally. Autonomous vehicles are the blueprint for making sure robots do only what they are told.

TRUMP-XI SUMMIT

ABSENCE OF MAJOR AGREEMENTS, OR EVEN A JOINT STATEMENT, REFLECTS FIERCE COMPETITION

A taste of tactical diplomacy

ANITA INDER SINGH

Founding Professor, Centre for Peace and Conflict Resolution



result of the summit was more about a trade armistice than crafting a grand reset of trade and investment strategies. Neither side has announced trade breakthroughs or significant deals on agriculture or Boeing jets. Generally, Trump prefers incremental agreements to maintain tariff leverage over Beijing.

On another plane, since China possesses some 70% of the world's critical minerals and rare earths, America seeks access to rare-earth elements while trying to prevent China from using export controls as leverage as it dominates global critical mineral refining which is essential for both AI and the energy transition.

Restrictions on rare-earth exports have become one of the most contested issues between Washington and Beijing, as China wants assurances that the US will not misuse export controls.

At the security level, the summit's broader strategic significance was determined by what it signalled to America's allies, including Japan, the Philippines, and South Korea, who had been keeping an eye on Xi's visit to Washington. They are concerned about a major shift in the international security environment. For, contemporary US-China relations cannot be understood through the bilateral lens of the Cold War. Coalitions, rather than

individual states, appear to be shaping the balance of power in the Indo-Pacific, especially as Trump's America looks unreliable as a bulwark against China.

For example, Japan gave up its post-World War II pacifism and embarked on full militarisation following Russia's 2022 invasion of Ukraine. "Ukraine today might be East Asia tomorrow", warned the former Japanese premier, Fumio Kishida, at the time, in an obvious reference to Taiwan. The Philippines has expanded military access for US forces. South Korea and Japan have deepened security cooperation despite old political strains.

And even before "Ukraine", the creation of AUKUS (2021) by the Biden administration marked the deepening of defence cooperation between Australia, the United Kingdom, and the US, especially on nuclear issues.

From Beijing's viewpoint, the significance of these developments extends beyond any single summit. Therefore, America is no longer the only challenge faced by China. An increasingly integrated coalition of allies could be a stronger threat. Their coalition-based military architecture could menace China. But the countries involved in stronger military collaboration see themselves as defending themselves against China's expansionism.

In the long run, neither China nor the US will unilaterally frame the global order according to their whims

The casting vote conundrum



VIRAL MEHTA

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Interpretation of 2014 amendment to Article 121, which relaxed Tata Trusts' affirmative-vote requirement, may well decide dispute over N Chandrasekaran's reappointment

ON SEPTEMBER 17, the six-member board of Tata Sons met to consider the reappointment of N Chandrasekaran as chairman. The board comprised Chandrasekaran; two Tata Trusts nominee directors, Yenu Srinivasan and Noel Tata; and three other directors, Harish Manwani, Saurabh Agrawal, and Anita M George. Chandrasekaran abstained from voting on his reappointment. The remaining directors voted 4-1 in favour, with Noel Tata dissenting.

Ordinarily, this vote would have resolved the matter. However, Article 121 of Tata Sons' Articles of Association stipulates that the matter requires the affirmative vote of a majority of the Tata Trusts directors present. Since the directors were split, that criterion was not met. Manwani nevertheless purported to break the tie between the two Tata Trusts' nominees by exercising a casting vote under Article 121.

The central question is whether that casting vote was valid. Its resolution hinges on interpreting the text, structure, and history of Article 121.

The article states: "Matters before any meeting of the Board which are required to be decided by a majority of the Directors shall require the affirmative vote of a majority of the Directors appointed pursuant to Article 104B present at the meeting and in the case of an equality of votes the Chairman shall have a casting vote."

Structurally, Article 121 contains three components. First, it establishes a simple-majority rule: a resolution must receive the assent of a majority of the Tata Sons directors. Second, it imposes an additional

affirmative-vote requirement: the resolution must receive the affirmative vote of a majority of the directors appointed pursuant to Article 104B (i.e. the Tata Trusts directors) present at the meeting. Third, it gives the chairman a casting vote in the event of an equality of votes.

The history of the provision is instructive. Before 2014, Article 121 required the affirmative vote of all Tata Trusts directors. In 2014, the word "all" was replaced with the phrase "a majority of". The amendment thus relaxed the Tata Trusts' affirmative-vote requirement by permitting a resolution to pass without the support of every Tata Trusts director present. It left intact, however, both the simple-majority rule and the casting-vote provision.

The historical context suggests that prior to 2014, the affirmative-vote requirement was absolute: the support of every Tata Trusts nominee was necessary. A casting vote therefore could not resolve a tie among those nominees. Hence, the casting-vote provision operated only at the board level. The provision's unchanged language after 2014 further suggests that the amendment was intended to relax the unanimity requirement without altering the casting-vote mechanism.

The Tata Trusts would emphasise that continuity. The amendment, they would argue, was not intended to transform a board-level tie-breaking mechanism into

a Tata Trusts' nominee tie-breaking mechanism. Such a change would have substantially expanded the provision's operation without any corresponding change in its language. Therefore, they would assert that the casting vote remains confined to board-level ties.

Tata Sons, by contrast, would contend that the 2014 amendment implicitly authorised the chairman to break a tie among the Tata Trusts nominees as well. They would suggest the amendment created a dual application of the casting vote, extending its use beyond the board to break internal ties among the Tata Trusts nominees. The question is whether the Tata Trusts intended this broader scope. Three considerations support the narrower interpretation. First, the affirmative-vote requirement gave the Tata Trusts nominees a veto. A veto operates as a threshold requirement and is distinct from a casting vote, which resolves a tie after the applicable threshold has been met. Suppose, for example, a resolution received the support of both Tata Trusts nominees and one other director but was opposed by the remaining three directors. The Tata Trusts' threshold requirement would be satisfied, and the resulting board-level tie could be resolved by the chairman's casting vote. If, however, one of the two Tata Trust nominees opposed the resolution, the required majority among those nominees would be absent. The threshold

would fail, and no casting vote would arise.

Second, even if the Tata Trusts intended to create a mechanism for resolving an internal tie, they likely would have assigned that authority to one of their own nominees. In the vote on Chandrasekaran's reappointment, Manwani cast the decisive vote and thereby purported to satisfy the Tata Trusts' affirmative-vote requirement, although he was not a Tata Trusts nominee. It is difficult to conclude that the Tata Trusts intended a non-nominee to serve as the arbiter of an internal tie.

Third, a chairman's casting vote is conventionally understood as a second vote. The chairman first votes on the resolution as a director; if the vote results in an equality, the chairman casts a second vote to break the tie. Consistent with that understanding, the model articles of association under the Companies Act, 2013, refer to a "second or casting vote". On that view, Manwani's casting vote would have been appropriate at the board level but not to resolve an internal tie among the Tata Trusts nominees, because he was not one of the directors whose vote produced that tie.

Ultimately, the dispute over Chandrasekaran's reappointment may depend on the interpretation of the 2014 amendment to Article 121, which relaxed the Tata Trusts' affirmative-vote requirement. Although seemingly minor, the amendment could have profound implications for corporate governance at Tata Sons and the Tata group at large.

Views are personal

LETTERS TO THE EDITOR

Managing drought

Apropos of "Withdrawal symptoms" (FE, September 28), India is staring at the serious consequences of an El Niño-induced deficient southwest monsoon. The immediate concern is the vulnerability of small and marginal farmers dependent on rain-fed agriculture. Reduced soil moisture, depleted reservoirs, and inadequate groundwater recharge could affect the kharif crop and sowing for the next

season. Lower output may raise prices of vegetables, pulses, and edible oils, while weak rural demand could further affect the informal economy. The Centre and states must shift from relief-oriented responses to advance drought management. District-wise contingency plans should promote short-duration, drought-resistant varieties, millets, pulses, and oilseeds instead of water-intensive crops. A deficient monsoon is not just a seasonal inconvenience; it is a warning

about India's growing climate vulnerability. Timely, decentralised and scientific action can prevent a rainfall shortfall from becoming a wider crisis. —Bal Govind, Noida

Climate strategy

The lingering impact of El Niño limit rainfall, posing a threat to agriculture. This calls for managing scarce water rather than depending on erratic monsoons. Groundwater should be used judiciously through drip

irrigation. Farmers should also switch to drought-tolerant crops that are not water-intensive. Rainwater harvesting and farm ponds can replenish groundwater reserves. A climate-resilient strategy is essential to sustain production with limited water. As a protective measure, crop insurance must be given to farmers, while cluster farming could help bear water risks. —NR Nagarajan, Sivakasi

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Enhancing capabilities

India should focus on expanding the GCC ecosystem

The world's largest coffeehouse chain, Starbucks, recently signed a memorandum of understanding (MoU) with the Tamil Nadu government to establish its first India global capability centre (GCC) in Chennai. This will create about 800 high-value technology jobs in its first phase. The investment adds to Chennai's growing GCC ecosystem. The city already accounts for about 10 per cent of India's GCC talent base, with more than 250 centres, and recent commitments from wind turbine maker Nordex show a growing interest in the city. The timing is important. India's GCC ecosystem has reached over 2,100 centres, employing 2.36 million professionals and generating nearly \$100 billion in revenue, according to a recent Nasscom-Zinnov report. The number of centres has grown 32 per cent since FY21, with more than 500 Forbes Global 2000 companies now operating GCCs in India. GCCs also account for a rising share of India's services exports, increasing from 19.7 per cent in FY19 to 23.5 per cent in FY26.

The nature of this expansion is changing with time. Nearly half the GCCs established since FY21 have been built with artificial intelligence (AI) as a core focus, while more than 1,200 centres have embedded AI and machine-learning capabilities. According to industry estimates, nearly two-thirds of GCC roles created this year require AI, data science or automation skills. Hiring has grown substantially since 2021, reaching about 228,000 in the first half of 2026, up 11 per cent from a year earlier, and is projected to cross \$10,000 for the full year. Notably, 56 per cent of hiring is concentrated among professionals with four to 10 years of experience, highlighting the growing demand for specialised mid-career talent. Reskilling, therefore, needs attention. A study by PwC India-Federation of Indian Chambers of Commerce and Industry finds that 72 per cent of GCCs need to reskill or upskill more than 40 per cent of their workforce as AI changes job requirements. In this regard, companies have to invest more in continuous learning, while universities need to align their curricula more closely with emerging industry requirements. The state needs to focus on industry-linked skilling, university-industry research & development, reliable infrastructure, and faster regulatory approvals enabling ease of doing business.

It is also worth noting that around 94 per cent of GCC hiring remains concentrated in six major cities, creating pressure on talent availability, housing, transport, and other urban infrastructure. Tamil Nadu can use Chennai's momentum to develop complementary hubs in Coimbatore, Madurai, and Tiruchirappalli. Linking local universities and engineering talent to specific industry clusters could widen the talent pool and make growth more geographically balanced. Other states, such as West Bengal, should also tap this opportunity by building on Kolkata's emerging GCC base and improving the ecosystem for technology, skills and investment. The success of the GCC story should not be measured only by the increasing number of centres, but also by maximising the value created by them. Although the output and intellectual property created in GCCs mostly belong to foreign companies, the fact that such work is happening in this country with the Indian workforce will have spillover effects over time. GCCs are also supplementing India's services exports, which is helping not only through job creation, but also by supporting the external accounts at a macro level. Thus, both the Union and state governments must continuously work on improving the operating environment.

The spirit of liquor bans

The apex court rightly highlights futility of prohibition

The Supreme Court's recent pronouncement on the futility of alcohol bans has rightly focused on the deleterious impact of such strictures on societal security and state finances. The court was giving its verdict on a case challenging restrictions on sales of methanol to industrial consumers. The restrictions were introduced by the Maharashtra government after 250 people had died consuming spurious liquor distilled from the chemical in a Mumbai bar in 1991. Stating that the prohibition did not end alcoholism, the two-judge Division Bench of Justice JB Pardiwala and Justice K Vinod Chandran highlighted five major "evils" associated with prohibition: Revenue loss, money spent on enforcement, corruption in police, illegal distilling, and a rise in secondary substance abuse.

Recent experience with prohibition in states largely reflects this pattern. In Haryana, then Chief Minister Bansi Lal's 21-month experiment with prohibition in 1996 not only cost the state an estimated ₹1,300 crore in forgone revenue, it also encouraged the creation of a violent liquor-smuggling mafia, caused an upsurge in deaths from illicit liquor consumption, and resulted in the loss of thousands of direct and indirect jobs associated with the liquor trade. To compensate for the revenue loss, the state raised the prices of basic services — such as bus fares — and taxes on petrol. Not surprisingly, the policy cost Bansi Lal's Haryana Vikas Party seats in subsequent Lok Sabha and Assembly elections. In Bihar, where Nitish Kumar won the gratitude of women by imposing prohibition in 2016, the results have been sub-optimal. A study by the National Council of Applied Economic Research said the ban had failed to reduce crimes against women. On the contrary, the state has seen an upsurge in crime owing to an exponential expansion of illicit liquor networks. Before the ban, liquor accounted for 14 per cent of the state's own revenue, a sizeable sum to forgo for a state that tops the poverty charts, even as expenditure on (futile) enforcement burgeoned. As regards Gujarat, the court pointed to the consistent failure to prevent hooch-related deaths. It said the state had witnessed 10 major hooch tragedies since the its formation. Those claimed the lives of over 600 people. That apart, any visitor to the state can attest to the ease of accessing liquor, thanks to the existence of a well-oiled illegal supply chain.

The apex court's own 2016 decree highlighted the limits of even partial prohibition. In a well-meaning effort to address drink-driving deaths and accidents, the court had proscribed the location of liquor vends within 500 metres of the outer edge of national and state highways. This order resulted in considerable creative collaboration among state excise departments, police, liquor vends and hotels located on the peripheries of highways to manipulate entrance gates to beat the distance rule. Two months later, the impracticality of the remedy caused the court to modify the order to exempt urban areas through which highways pass. There is no doubt that addressing problems related to alcoholism is critical but, as the judges have pointed out, the solutions lie elsewhere — such as in investment in de-addiction centres. The payment of worker wages to the woman of the household is another remedy that worked in the coalfields of northern Britain. These are certainly healthier options to explore than the blunt instrument of prohibition.

The jobs overhang on growth

The country needs to create enough productive jobs if it is to sustain its high growth

India has been recording healthy economic performance, with gross domestic product (GDP) growth exceeding the 7 per cent mark over the last three years. For sustained and inclusive high growth, it is critical to accelerate employment generation in the economy. This becomes even more crucial given India's favourable demographic structure, with the share of the working-age population rising to 68 per cent from 62 per cent two decades ago.

India is enjoying this demographic dividend at a time when most major economies, including the United States, the European Union and Japan, as well as Asian peers such as China and Thailand, are ageing. However, to benefit from this demographic dividend, it is important for employment growth to keep pace with the expansion in economic activity and the growing labour force.

Our analysis based on the International Labour Organization's modelled estimates shows that employment growth had lagged population growth in the 15+ age category during 2001-2020. However, the pace of employment among individuals aged 15+ has picked up post-pandemic (2021-2025) outpacing the population growth in this age category. Since the pandemic, employment in this age category has grown at 3.5 per cent versus 1.1 per cent in the preceding five years, and a low of 0.5 per cent in the period between 2006 and 2010. Employment elasticity, which measures the growth in employment vis-à-vis economic growth, improved to 0.46 during 2021-2025, from 0.22 in 2011-15 and a low of 0.08 during 2006-2010.

India's unemployment rate has stabilised around 3.1 per cent (Periodic Labour Force Survey or PLFS) since 2023, moderating from 6 per cent in 2018. Though this is encouraging, it is important to understand that the measurement criteria might not be fully capturing the extent of unemployment, given the high share of self-employment and the prevalence of disguised unemployment in sectors like agriculture. Moreover, the data may understate the extent of unemployment in an economy like India that is characterised by seasonal, casual and irregular employment.

The country's employment scenario faces several long-standing challenges such as low labour force

participation rate (LFPR), persistent education-skill mismatches, youth unemployment, and higher informality in jobs. India's LFPR, according to the PLFS, improved to 59.3 per cent in 2025, from 49.8 per cent in 2018. However, India's LFPR remains below the global average of 61 per cent, trailing several Asian countries including Vietnam, Singapore and Indonesia.

This is largely due to low female labour force participation — at 32 per cent in India compared with 68 per cent in Vietnam and 59 per cent in China and Thailand.

With rising aspirations and education-skill mismatch, the unemployment rate is disproportionately higher among individuals with higher levels of education. Furthermore, there is high youth (15-29 years) unemployment at 9.9 per cent (2025). There is a predominance of self-employment in India, particularly in rural India and among women. While rising self-employment is a positive feature for the employment landscape, it could also be indicative that the economy is not generating adequate job opportunities. The share of self-employed in India was as high as 56.2 per cent in 2025,

higher than the pre-Covid level of 52.1 per cent. Moreover, the share of casual labourers was 20.2 per cent. A high share of self-employed and casual workers is indicative of informality in the Indian labour market.

India is going through this challenge of job creation at a time when the global labour market landscape is grappling with increasing use of artificial intelligence (AI) and automation risks. These aspects seem to be already weighing on the hiring trends in the formal employment market in India. Our analysis of a sample of 236 companies from the Nifty 500 showed flat net employee addition in FY26, compared to strong gains seen in the post-pandemic period (FY22-FY23). Specifically, net job addition was weak in banking/finance and IT sectors.

A look at sector-wise job creation shows that agriculture absorbs the largest chunk of the workforce at 43 per cent, even though it contributes only about one fifth to India's GVA (gross value added). This reflects low labour productivity and disguised unemployment in the agriculture sector. There is an urgent need for labour to move from agriculture



RAJANI SINHA & AKANKSHA BHENDE

Corporate India is not always the saviour

Finance Minister Nirmala Sitharaman's recent speech at a premier business convention raises interesting issues that merit closer examination and debate. The minister pointed out that the next phase of consumption growth will come from "upward mobility" — income growth that enables more discretionary expenditure — from India's consumption base of "working families across agriculture, rural construction, transport and informal enterprise". In other words, people with modest incomes and modest occupations, at the base of the income pyramid.

She exhorted "corporate India" to serve this emerging market for the "structural durability of growth".

The assessment that consumption growth will come from a large mass of people moving with a small acceleration in their income growth is justified. As this column has often pointed out, force is mass × acceleration, and a big "M" with a little "a" is just as powerful as the reverse.

However, the assumption that this market is unserved and awaiting Corporate India, a shorthand for large established companies, is not true. Small and regional businesses, across sectors, are deeply entrenched here; they are the less visible "Lilliput businesses" that have given traditional large incumbents, the more visible Corporate India, a run for their money.

The mental models used for policymaking need to be revisited and updated. In the old days, there was the organised sector, the mainstream of acceptable quality supply, and the equally large unorganised sector, dismissed as cheap, substandard supply that consumers would reject as soon as they could afford better.

In the last 20 years, and with the advent of the digital age, the entry barriers to distribution and access to all manner of knowhow and talent that businesses needed (but sadly not capital) came crashing down. The small unorganised sector, now goods and services tax-purified, evolved and, in many cases, started offering superior consumer-

perceived value (benefit minus cost) compared to larger corporations. A look at Amazon's supply base and a walk down any small-town or semi-urban market will confirm this, as do public statements from fast-moving consumer goods and apparel companies' chief executive officers calling out severe competition from small and regional players. Further, for almost two decades, "make for India" has been synonymous with "made in China".

India's small suppliers and China's influx have proved that mass markets, like time and tide, wait for no man. Multi-national companies offer a cautionary tale. They consistently followed a strategy of "let's serve the top of the income pyramid and wait for the rest to attain income levels worthy of being served" and found that, far from being eagerly embraced when consumer incomes grew, they had to fight to get into the consideration set.

So the next phase of consumption is already being served well by agile, innovative small businesses and opportunistic imports. A "jugaad broom", which bends in the middle the way a Dyson cleaning attachment does, a Paithani look-alike sari at ₹500, perhaps made in China, children's schoolbags, shoes that a small-shop delivery boy wears, blankets and polyester warm wear, cheap smartphones and an array of packaged food are examples of the ubiquitous range of needs small suppliers serve for modest-income consumers across the country.

Why is corporate India reluctant to serve an obvious source of consumption growth? According to government data, in the past decade, increases in discretionary income of this mass consumer base have been slow, and in some sectors of employment almost stagnant. Meanwhile, the high-income, high-value "class" market has grown its income and consumption faster, is far from saturated, very receptive to good Indian brands, and still under-served. Its fragmenting family structure is also fuelling consumption as the number of



RAMA BIJAPURKAR

households per thousand population increases.

The strategic choice many in corporate India have made is to invest in this beautiful swan and not the ugly duckling, and wait for it to transform. Is that shortsighted? Yes, if the time horizon is over 10 years and no, if it is QSQT (*quarter se quarter tak*), or if the CEO's term is shorter and bonused to the stock price. Unlike the days of Saral soap and Lehar Pepsi, the government can only persuade, not force them.

The present mental model of supply that policymakers have is fragmented into MSME (micro, small and medium enterprises), startups, "industry" (read traditional corporations), unincorporated informal enterprises, and so on. This makes for a fragmented understanding of consumption and supply, and causes fragmented policy actions. A segment of small businesses sits at the confluence of consumption, mass markets and employment. Yet the notion exists of big "industry" being the propeller of all forward movement, while those already there are not offered the same facilitation.

Despite numerous committees discussing their problems, their biggest impediment — access to capital — is yet to be addressed. Policymakers need to holistically see India's multi-tiered base of consumers, suppliers and employers, and design a multi-tiered, clearly-segmented policy. For a start, the first M of MSME should be detached and the SME further segmented.

The same argument goes for the expectation that large corporations sharing profits more fairly will fuel wage growth in the country. They employ a tiny fraction of the workforce and will continue to do so, and wages of the formal sectors or government salaries, unlike those under the erstwhile Mgnrega, have no signalling value.

It is time to reimagine the theories of economic development given the age we live in and India's peculiarities (or precociousness, to borrow a phrase from the book *A Sixth of Humanity*).

The author is a business advisor in the area of customer-based business strategy

Tomorrow's route map for India's economy



A K BHATTACHARYA

In October 2023, Cornell University organised a conference at its campus in Ithaca (New York State, US) to examine the Indian economy's prospects in a changing global landscape. Prominent economists, corporate leaders and policymakers were invited to present their papers to help analyse how India could emerge from the prevailing turmoil, caused by a combination of geopolitical tensions and the rapidly spreading digital revolution.

Eleven essays in this book capture some of the thoughts participants shared at this conference. The essays have dealt with three broad themes: India's growth aspirations in the context of innovation, technology and financial access; consequences of India's liberal-

isation with adverse implications for industrial concentration and jobs; and obstacles for growth posed by inequalities in the labour market.

The editors, all noted economists and academics of repute, have done well to use the introductory chapter to provide a perceptive account of how India evolved after independence. They ask whether the Indian economy, already buffeted by a series of shocks and disruptions, can take advantage of its geopolitical position, overcome its many weaknesses and emerge as an advanced economy. They admit there are no easy answers to that complex question. But they conclude that the essays in this book should help find an answer to questions concerning India's economy, society and polity.

What stands out in this book are interesting research findings that shed new light on the Indian economy. Sonalde Desai and Pallavi Choudhuri examine the heterogeneous benefits of college education in India and conclude that the gains from a college education bypass those who overcome initial adversity. Instead, most beneficiaries from college education belong to privileged sections of society.

Ashwini Deshpande presents a similarly dire finding, underlining the perennial problem of the low female labour force participation rate in India. Significantly, she attributes this not to women opting out of the job market, but to a systemic failure in generating inclusive growth. Her research underlines the need for policy interventions that simultaneously expand job opportunities and dismantle patriarchal constraints.

An even more important essay in this volume is about India's poverty headcount. It provides an alternative set of estimates for India's poverty level, questioning studies by economists who argued that the number of poor people in the country fell dramatically between 2011 and 2020. Written by Maitreesh Ghatak and Rishabh Kumar, the essay questions the claimed poverty decline on two grounds: A stagnant share of agricultural output in India's gross domestic product (GDP) for about two decades and a high rate of informal employment. Their analysis suggests that the poverty headcount remains around 20 per cent, contrary to earlier estimates by economists who argued that the poverty rate

fell from over 22 per cent to around 10 per cent between 2011 and 2020.

Nirvikar Singh's essay on India's green transition offers hope that the country's plans for an accelerated green transition can be achieved with the right strategic focus, especially in the key sectors of electric power generation and transportation. But there is an important caveat. Substantial institutional barriers and disturbing inertia in government action at both the Union and state government levels threaten to obstruct the rollout of feasible and optimal policies to expedite the planned green transition.

The essay by Anand Mani, based on his paper presented three years ago, is prophetic. He underlines the role of sustained civic participation in movements to ensure that the people's democratic rights are protected and governance does not suffer. His call will remind readers of what India witnessed earlier this year when a movement by students forced the government to accede to demands for better governance.

Backed by research, Prachi Mishra and Aditi Singh forecast a further decline in savings in India, underlining a positive

outlook for consumption. They, however, do not offer a clear view on whether this would hurt investment and growth. Using data and research, Devashish Mitra buttresses the familiar argument that rising tariffs not only check imports but also harm exports, undermining efforts to create more jobs in the process. Regarding India's trade policy, the essay bemoans how it has become protectionist, though with some correction in recent years.

Similarly, Kunal Sen and Rajesh Raj Natarajan question the effectiveness of a services-focused development strategy, arguing that labour-intensive manufacturing should still be the preferred path for growth in a world where China is vacating many areas of low-end manufacturing. Equally relevant questions have been raised by Viral Acharya and Rahul Singh Chauhan on the need to expedite factor-market reforms in land, labour and power to attract more foreign investment, instead of pursuing a centralised and concentration-based industrial policy.

Two respected voices from industry



The Indian Economy: Navigating a Global Turning Point
Editors: Kaushik Basu, Sonalde Desai, Ashwini Deshpande, Nirvikar Singh
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also find a place in this volume. N R Narayana Murthy points to the need for companies to adopt a strategy for promoting innovation and Naushad Forbes underlines the importance of industry and the government collaborating to make the national innovation system work for both industry and the country's future.

A rich anthology of deeply researched essays, however, suffers from two minor shortcomings. It does not carry brief biographical sketches of the essay contributors, although the editors have theirs on the inside jacket of the book. And the introduction mentions that a few chapters were later added to those essays, which were largely based on papers presented at the Ithaca conference. However, it is not clear which of these essays the editors added later. Barring these glitches, the book will provide important inputs for policymakers in the Indian government, just as it will serve as a reference document for students of the Indian economy, helping them understand the country's challenges and opportunities.



Editor's
TAKE

It's a matter of the heart:
Don't miss a beat!

India's demographic dividend is only as strong as its arteries. On World Heart Day, the pledge is simple: don't miss a beat, and don't let the country miss one either

Every September 29, World Heart Day asks the world to listen to the one organ we notice only when it falters. Founded in 2000 by the World Heart Federation with the WHO, the day endures because its message never ages: cardiovascular disease is the planet's leading killer, claiming nearly 20 million lives a year. More than four in five of those deaths are heart attacks and strokes, and a third strike people younger than 70. This year's campaign, "Don't Miss a Beat", targets the disease's cruellest feature: it often gives no warning until it is too late.

How did an ailment of old age become an epidemic of the prime of life? Because modern living has industrialised every risk factor. Ultra-processed food, salt, sugar and trans fats have displaced home cooking. Desks have replaced fields. Tobacco persists, air pollution chokes our cities, and sleeplessness is worn as a badge of ambition.

Cardiovascular disease caused 26.6 per cent of all Indian deaths in 2017, up from 15 per cent in 1990. Heart attacks in the thirties and forties, among breadwinners, are at their peak. Kerala, Punjab and Tamil Nadu rank among the top. An estimated 315 million Indians live with hypertension, yet only about 28 per cent know it, and barely one in eight has it under control. Another 136 million have prediabetes. The epidemic is not concealed. We simply are not looking.

The way out is neither exotic nor expensive. First, detect early. Blood pressure, sugar and cholesterol checks must become as routine as a mobile recharge, available at every health and wellness centre. Second, treat cheaply and continuously.

The India Hypertension Control Initiative proves it works: across nine districts, blood pressure control rose from 37 to 48 per cent between 2018-19 and 2023-24, while patients' out-of-pocket medicine spending fell from 47 to 9 per cent. That model belongs in every district.

As a nation, we have to make choices, healthy choices, that can make India fit again. No doubt yoga can be a great way to get healthy, but it must be accompanied by lifestyle choices, eating right, sleeping right and keeping three culprits, hurry, worry and curry, in check. Then there are so many things in the market that are enough to make us unhealthy. Salt and trans-fat limits, tobacco, alcohol and plenty of processed food need to be curtailed. Besides, cleaner air and daily walks can make all the difference. Moreover, it is very important to prepare for emergencies before they happen. Chest pressure, breathlessness and pain spreading to the jaw or arm demand a hospital, not a home remedy, and CPR should be taught in every school and office. World Heart Day is a reminder that the heart is more than an organ that keeps us alive, it is at the centre of our physical well-being, working silently every moment.

Azerbaijan: The art of being everyone's exception

Baku does not balance between friends and enemies. It balances between the interests of its friends, its neighbours and its own survival. In an age increasingly obsessed with blocs, Azerbaijan offers a rather different lesson. The strongest position for a small state may not be choosing a side. It may be making every side need a relationship with you



BHOPINDER SINGH

Azerbaijan is one of those countries that makes conventional geopolitics look strangely inadequate. Here is a predominantly Shia country that is deeply secular, culturally Turkic and strategically close to Israel. It is bound to Turkey by an almost fraternal alliance, maintains a strategic partnership with Pakistan, is deepening ties with China, and yet remains obliged by geography to keep talking to Iran, its fellow Shia neighbour.

On paper, it is a collection of contradictions. In practice, it is a remarkably coherent strategy. Baku has mastered the art of being close without being captive. Azerbaijan does not appear to organise its foreign policy around ideological camps. It organises it around interests. Religion does not dictate its diplomacy. Neither does geography. Neither does friendship.

That is why Israel and Turkey can coexist comfortably in Baku's foreign-policy architecture. Turkey provides strategic depth and an intimate political relationship. Israel provides defence, intelligence, technology and energy cooperation. Pakistan provides political solidarity and a useful partnership in the Muslim world. China offers capital, connectivity and another great-power relationship. Iran, meanwhile, is the unavoidable neighbour whose hostility can never be allowed to become a permanent rupture.

The remarkable thing is not that Azerbaijan has all these relationships. It is that it has managed to keep them from cancelling one another out. This is strategic ambiguity, but not ambiguity in the sense of not knowing where one stands. Baku is remarkably clear about its interests. The ambiguity lies in refusing to let those interests be reduced to membership in a single geopolitical camp. And that distinction matters.

Azerbaijan can be Israel's strategic partner without becoming Israel's proxy. It can be Turkey's closest ally without becoming merely an extension of Ankara. It can cultivate Pakistan without adopting Pakistan's world-view wholesale. It can deepen relations with China without joining a Chinese bloc. And it can quarrel with Iran while still recognising that Iran will remain next door tomorrow, next year and for decades to come. That is the essence of strategic balance among the unnatural and the unthinkable.

The relationship with Iran is perhaps the most revealing. Shared Shia identity has done



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DIPLOMACY

The writer is a former Lieutenant Governor of the Andaman and Nicobar Islands and Puducherry, and a military veteran

Daiv Vani

WISDOM FOR A MEANINGFUL LIFE

The King Who
Became a Sage

Some transformations are not sudden revelations, but the slow result of an entire lifetime spent in struggle.

Vishwamitra was born a king, accustomed to power, command, and the easy deference of an entire army, until an encounter with the sage Vasishtha, whose simple hermitage possessed a wish-fulfilling cow far more valuable than his own considerable military might, humbled him more deeply than any battle ever had. Determined to attain such spiritual power himself, he renounced his throne entirely and undertook centuries of relentless penance, facing repeated setbacks and humiliating failures along the way, including being seduced by the celestial Menaka and losing years of hard-won progress in a single unguarded moment of weakness.

Rather than giving up in shame, he simply began again, and then again, eventually earning the exceedingly rare title of Brahmarishi, a sage born a warrior, but elevated purely through sustained discipline rather than birth or lineage.

His path was never one of smooth, uninterrupted mastery, but rather repeated failure met each time with renewed effort, proving convincingly that persistence mattered far more in the end than an unbroken record of success.

We often abandon our own self-improvement after a single setback or embarrassing failure, quietly believing that failure has permanently disqualified us from ever truly succeeding at it.

Today, return to one goal you abandoned after a setback, and begin again, without treating that earlier failure as the final word on what you are capable of.

—DAIV



SIDDHARTH ROY

2ND
OPINION

A civil engineer is trained to calculate how much a structure can carry. But engineering also asks a less celebrated question: how much should remain unbuilt? A river needs a floodplain. A bridge needs expansion joints. A road needs setbacks. A city needs open ground. What appears empty on an engineering drawing may be the space that prevents failure.

This principle has implications beyond engineering. It should influence how governments make decisions about land, infrastructure and urban growth. Yet public policy often rewards visible construction while treating unoccupied space as an opportunity lost. The pressure to build is understandable. But when every space is consumed, efficiency can quietly turn into vulnerability.

Consider floodplains.

The wisdom of leaving space

A river does not recognise a zoning map when heavy rainfall arrives. Its floodplain is part of its natural drainage system, providing temporary storage when water levels rise. Allowing extensive construction in such areas may generate short-term economic value while transferring the eventual cost to taxpayers, insurers and residents.

A policy that protects floodplains may appear restrictive in the present while preventing far greater losses in the future. The same logic applies to wetlands, urban ponds and drainage corridors.

They can look economically unproductive because their value is not always captured in a land-price calculation. Yet they store water, recharge groundwater, moderate heat and support ecosystems. The policy question is not simply, "How much revenue can this land generate?" It is also, "What public function will disappear if this land is built over?"

Engineering offers another useful analogy.

Materials expand and contract with temperature. Structures move under changing loads. Expansion joints deliberately provide room for that movement. Without such allowances, stresses accumulate until something cracks.

Infrastructure policy requires margins. Roads, drainage networks, electricity systems and hospitals cannot be designed only around average demand. They need capacity for rainfall, traffic surges, heatwaves, power failures and shocks. Building precisely to today's demand

may seem efficient, but leaving no reserve capacity can make tomorrow's emergency much more expensive.

This is where policy must resist the seduction of short-term arithmetic. The cheapest project today is not necessarily the least expensive choice over its lifetime. Preventive spending, protected open spaces and unused capacity can be difficult to justify because their successes are often invisible: the flood that did not become a disaster, the road that did not collapse into congestion, the hospital that could accommodate a sudden surge.

Leaving space also raises a question of intergenerational responsibility. Once a wetland is filled or a public ground disappears beneath concrete, restoring it may be impossible. Today's planning decisions therefore consume land and the options available to tomorrow's citizens.

The wisdom of leaving space is ultimately a philosophy of restraint. It does not oppose development. It asks development to recognise limits, uncertainty and public risk. A river needs room to overflow.

A structure needs room to move. Infrastructure needs spare capacity. Perhaps good policy, like good engineering, is not about using every space. It is about knowing which spaces society cannot afford to lose.

The writer is a consultant to Rashtriya Raksha, a civil engineer, short story writer, columnist, public policy expert and contemporary affairs commentator

LETTERS TO THE EDITOR

Youth deserve to be heard

Whether the ruling party likes it or not, the youth are deeply concerned about their future. Given concerns over education, healthcare and employment, along with corruption and the growing influence of criminals and the affluent in governance, many young people have little reason to feel secure about what lies ahead.

It is natural for citizens to seek changes that could lead to a better future. Denying people the right to voice their concerns and protest against government policies can further deepen their dissatisfaction. Suppression, threats or intimidation may only strengthen their determination to raise their concerns. The government would be better served by engaging with young people through dialogue and addressing their demands with the seriousness and priority they deserve. Constructive engagement can help build trust and provide a democratic avenue for resolving grievances.

After all, young people are citizens of the country and deserve to be heard. Their concerns about education, healthcare, employment and governance should receive meaningful attention. A responsive administration must ensure that democratic participation remains open and that citizens can express their views peacefully and without fear.

AG RAJMOHAN | ANDHRA PRADESH

King Kohli rewrites ODI history

There are innings that win matches, and then there are innings that remind the world why a cricketer has become an era-defining figure. Virat Kohli's magnificent 139 not out, featuring 10 fours and nine sixes in the first ODI against the West Indies, belonged firmly to the latter category.

Kohli's performance was more than another entry in an extraordinary record book. It was a statement from a batter whose appetite for runs remains undiminished. During the innings, he extended his record of ODI centuries to 55, became the fastest batter to reach 15,000 ODI runs and moved ahead of Sachin Tendulkar for the most ODI runs on home soil. He also surpassed Mohammad Azharuddin's record for the most ODIs played by an Indian against the West Indies, making his 44th appearance against them.

Yet statistics tell only part of the Kohli story. His defining quality has always been his ability to approach every innings with the urgency of a newcomer and the confidence of a champion. He refuses to live on past achievements. Every innings becomes another challenge, another opportunity to prove himself. For millions of Indian cricket fans, watching Kohli walk to the crease remains an event in itself. His intensity and ambition continue to create lasting memories.

AP THIRUVADI | CHENNAI

Diplomacy must follow strong words

With reference to "Jaishankar's rebuke: Necessary message" (September 28), the significance of the External Affairs Minister's UN statement will depend on what India does after the applause has faded. His remarks came after Pakistan Prime Minister Shehbaz Sharif raised Kashmir and the 2025 conflict at the General Assembly. India responded by reiterating that terrorism cannot be normalised and that it retains the right to defend itself.

The next step should be a diplomatic campaign explaining India's position to governments. It should include verifiable evidence, briefings and closer cooperation on intelligence and terrorist financing. Equally important is maintaining communication mechanisms that reduce the risk of escalation. India and Pakistan remain neighbours, and any prolonged crisis can have consequences beyond their borders. India should pursue a calibrated policy: oppose terrorism firmly, respond when necessary, but keep diplomatic avenues available for de-escalation. The United States, Gulf countries, European nations and influential partners should be engaged through diplomacy. The international community should be encouraged to judge competing claims on evidence. A statement can set the tone; coherent policy and diplomacy must carry it forward.

BA NEBOBA | TAMIL NADU

PIC TALK

People perform 'Tarpan' ritual at Assi Ghat on the second day of 'Pitra Paksha', in Varanasi, Uttar Pradesh.
PHOTO: PTI

Sri Lanka's dilemma: Can the system change without being overthrown?

The test now for Sri Lanka is whether political change can move beyond changing rulers. Uyangoda sees a struggle between an old ruling class and a new political force, almost “like a class war”. A system designed to protect established power may resist transformation through the very institutions that give it legitimacy



NILANTHA
ILANGAMUWA

Sri Lanka's most dangerous political question is no longer whether democracy should survive. It is whether democracy can survive being used to dismantle the political order that has lived comfortably inside it. Recently, I sat down with Professor Jayadeva Uyangoda and found myself returning to that question. He entered politics believing revolution could remake society, joined Rohana Wijeweera's underground movement, survived 1971, spent six years in Welikada prison, and emerged not as a liberal convert but as something more troublesome: a Marxist who believes liberal democracy is indispensable, yet fundamentally insufficient.

“I was never converted to liberal democracy,” he told me. He retained his suspicion of capitalism and concentrated power while discovering, through defeat, imprisonment, reading and reflection, that freedom cannot be postponed until after revolution. “Liberal democracy is indispensable for political and social progress. But it is inadequate.” In that contradiction lies the central argument of his political life.

Uyangoda's critique begins where conventional celebrations of democracy end. Sri Lanka has elections, universal franchise, constitutional rights and competing parties. Yet democracy has repeatedly operated alongside concentrations of wealth, political power, family influence, bureaucratic authority and ethnic privilege. His objection is therefore not to democracy but to democracy emptied of substance. “People, demos, are the true owners of democracy. And democracy had been captured by the elites.” That is a brutal formulation in a country where the establishment presents itself as democracy's guardian. Parliament can function while citizens remain powerless; elections can occur while the same networks recycle power; constitutionalism can survive while inequality determines who can actually exercise freedom. His argument also goes beyond the familiar Marxist complaint about class. Liberal political theory, he argues, has treated society as an aggregation of autonomous individuals while neglecting communities, cultures and historically disadvantaged groups. For Sri Lanka, that omission is not theoretical. “Actually, liberal political theory doesn't have a theory of the state. It has only theories of government and regimes.” Changing governments, in other words, is not necessarily changing the state.

His transformation began in prison. “The Welikada prison was my second university after Peradeniya.” He read Marxism, literature, philosophy, political theory, novels, the Bible and prison literature; he sat law examinations and wrote poetry. Marxism gave him a language for class, production, exploitation and material suffering.

Prison exposed him to loneliness, emotional pain, guilt, loss and the interior life of people trapped inside an institution designed to deprive them of freedom. “I saw in others and experienced myself the emotional suffering while living in a prison for long years.” A political philosophy that cannot adequately account for the inner life of human beings cannot explain human emancipation completely. That is why his later politics combines individual freedom, social equality, pluralism and collective rights.

His most provocative lesson from revolutionary experience is harder to dismiss. “I learned that violent revolution can overthrow capitalism. But it cannot replace it with a humane society.” Uyangoda's prison education forced him to ask the more frightening question: what happens after victory? The Russian, Chinese, Cuban and Korean experiences showed that overthrowing exploitation does not automatically abolish domination.

A revolution can destroy one prison and build another. This is where his present interest in the National People's Power becomes politically explosive. A movement once committed to overthrowing the state is now attempting to govern through elections, Parliament, courts and the constitutional framework. “They are working within the very system they want to change,” he said. “That's why I am waiting and watching this process with great curiosity and deep concern.” He is watching whether an inherited state



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The writer is a columnist based in Colombo

can be transformed from within without reproducing the habits of the old order. That is where the real political gamble now begins.

The ethnic question makes the experiment harder. Uyangoda has spent decades arguing that Sri Lanka's crisis cannot be resolved by changing governments while leaving political power untouched. “Reforming the post-colonial ethno-ocratic state was the central task and challenge in all our conflict resolution efforts.” He rejects Sinhala Buddhist ownership of the state and insists that equal citizenship must mean more than formal equality. Tamils, Muslims, Malaiyaha Tamils and other communities must have genuine access to power.

Yet he is sceptical of inherited vocabularies. Federalism, self-determination and old constitutional arguments have become so politically poisoned that repeating them can reproduce the divisions they were meant to solve. His preferred language is democratic pluralism: a republic in which identities remain real without becoming permanent political enemies. “Differences should not lead us to divisions. Rather, they should bring all of us together as citizens in a Democratic Republic with diverse identities, not keeping us apart as enemies.”

His treatment of violence is equally unsentimental. Uyangoda refuses to romanticise either side of Sri Lanka's conflict. He speaks of Tamil civilians suffering violence from the state and from Tamil militant organisations, just as he has never denied the brutality of the revolutionary movement with which he was once associated.

His proposal for reconciliation is “strategic forgetting”: not erasing history, but refusing to allow unresolved memories to dictate every political relationship in the present. Can a society permanently organised around its wounds ever become politically reconciled? He does not ask people to deny what happened. He asks whether memory itself can become a political prison.

This is why his reading of the Aragalaya and the current political moment matters, even where one may disagree with his interpretation. He sees the uprising not as a fashionable youth revolt but as a social movement exposing a rupture between citizens and the old political class. “The challenge today is to re-democratise Sri Lanka's democracy.” Sri Lankans did not revolt because they had lost faith in democracy; they revolted because the democracy they inherited had become remote from ordinary citizens.

The test now is whether political change can move beyond changing rulers. Uyangoda sees a struggle between an old ruling class and a new political force, almost “like a class war”. But his warning is difficult to ignore: a system designed to protect established power may resist transformation through the very institutions that give it legitimacy. Asked what he would tell his younger self, the man who entered revolutionary politics believing history could be remade through struggle, he answered: “Never abandon political hope for a better society and a better political system. And always be an idealist.”

After revolution, defeat, prison, Marxism, liberalism, ethnic conflict and decades of scholarship, he has arrived not at certainty but at an insistence that political imagination must survive disappointment. For Sri Lanka, that is not a comforting message. It is a challenge to everyone who believes changing governments is the same thing as changing the country.

From incredible India to intelligent India



ADITI RAWAT

KRISHNA GIRI

For more than two decades, Incredible India has told the world what this country offers — civilisations, landscapes, spirituality, cuisine and cultural diversity. The next phase requires a different proposition, one that goes beyond putting an AI chatbot into a booking engine. This year's World Tourism Day theme, “Digital Agenda and Artificial Intelligence to Redesign Tourism”, invites a more consequential question: can

technology make journeys more meaningful, destinations safer and better managed, and tourism's economic gains more widely shared?

AI's most immediate contribution is hyper-personalisation. Industry has traditionally segmented travellers and designed products around broad categories; AI can move closer to the individual, building around a person's interests, budget, diet, mobility and pace, and revising the plan mid-trip.

A visitor could say, in her own language, that she has four days in Tamil Nadu, is exploring Chola history, prefers vegetarian food and wishes to avoid crowds. An intelligent system could weigh those preferences against weather, transport and live conditions to build the journey. Done well, such personalisation can deepen the experience. On a recent visit to Japan, one of the authors used AI to curate a day around a seafarer family member. Personalisation, in this form, makes travel more meaningful rather than merely more convenient. The gain is equally significant for tour operators. AI can help them research unfamiliar circuits, rework routes when conditions change and curate experiences around individual preferences rather than sell one itinerary to everybody. The quality of the output, however, still depends on human judgement deciding what the technology should optimise for. Destination management is another area where AI could have significant impact. In Tirupati in January 2025, six devotees died and around forty were injured in a crush while waiting for Vaikunta Dwara darshan tokens. The episode illustrates the limits of digitisation: a system may know how many tokens it has issued

without recognising that thousands of people are converging on one point faster than the space can safely absorb them. Research shows that crowd density and movement patterns can provide measurable warning signs. Studies of the 2006 Mina disaster and dense crowds suggest that such signals could support early detection of dangerous conditions. Maha Kumbh 2025 demonstrated India's ability to deploy AI-enabled cameras and command systems. The next step is predictive decision-making, using risk triggers to manage inflows, open alternative routes and position medical teams. Even a few minutes of warning could improve prevention and response, particularly in fragile Himalayan destinations.

Access itself can be managed more intelligently. What a destination can safely absorb changes with season, weather and emergency preparedness. Venice's day-tripper fee raised more than 15 million in 2025, yet visitor pressure remained high. Pricing can raise resources, but intelligent systems can do more to regulate flows through timed entry, seasonal quotas and, where justified, restrictions on repeat visits to the most fragile circuits. The economic opportunity may be greatest for small tourism establishments, which dominate tourism in many developing economies. Large hotel groups can employ specialists in pricing, analytics, multilingual marketing and demand forecasting. A five-room homestay, village guide or family-run restaurant generally cannot. AI can narrow this capability gap by turning heterogeneous information on booking patterns, reviews, seasonality and traveller preferences into usable business intelligence. It can also help them develop websites, translate listings, create marketing material, etc.

This can also address longstanding information asymmetries. Travellers often lack reliable information about smaller operators and emerging destinations, while those businesses know little about consumer demand and preferences. Reducing this asymmetry can allow them to compete more on the quality and distinctiveness of their experience than on the scale of operations. India cannot import global AI systems and assume they understand its tourism ecosystem. Models trained mainly on Western languages, destinations and traveller behaviour under-represent Indian languages, cultural practice and lesser-known places. An algorithm that knows Delhi but barely recognises Ziro is not merely imperfect; at scale, such systems decide which destinations and businesses are visible at all. Localisation, reliable local data and transparency about why one route is recommended over another are therefore not optional.

Safeguards matter equally. Tourism systems handle sensitive information about identity, location, spending and preferences. The Digital Personal Data Protection Act and the rules notified in November 2025 provide a general framework, but tourism will need clearer practices around consent, data sharing and retention across hotels, platforms, transport providers and public authorities. Access to intelligence itself must also not become another source of inequality. Rural operators who stand to gain most may have weaker connectivity, fewer digital skills and less capacity to pay. Multilingual voice interfaces, assisted adoption and shared digital infrastructure will therefore be essential.

None of this diminishes the importance of human hospitality. Tour operators who use these tools well will spend less time assembling routine itineraries and more time exercising judgement, curating experiences and solving problems. AI can translate a menu, optimise a route or analyse thousands of reviews, but it cannot replicate the host who explains a family recipe, the guide who brings history alive or the unexpected conversation that becomes the memory of a journey. Intelligent India should mean artificial and human intelligence used together, removing friction and spreading opportunity, while leaving more room for what makes travel worthwhile: people, places, culture and pleasure. Incredible India sent a powerful invitation to the world. Intelligent India should determine what happens once it is accepted.

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World Heart Day: Why every Indian must pay attention to blood pressure



DORAIRAJ
PRABHAKARAN

Hypertension's cruelty is that it asks nothing of you until it takes everything. Most people feel no pain or symptoms, though a small minority get warning signs like headaches or dizziness. For years, it slowly damages the heart, brain and kidneys, then, without warning, speaks all at once with a stroke, a heart attack, or failed kidneys. A parent driving to work may struggle to speak, walk, or recognise loved ones. Survivors call stroke worse than death; families ask too late how this happened when all seemed normal.

Often, the answer is a number no one thought to check: blood pressure. High blood pressure is quietly at work for years before it declares itself. This World Heart Day, observed under the theme “Don't Miss a Beat”, the most important beat may be the pressure pulsing, unnoticed, through our arteries.

Cardiovascular disease is the world's leading killer, claiming nearly 20 million lives a year, and in India it strikes earlier: heart attacks and strokes are increasingly common among adults in their forties and fifties, with uncontrolled blood pressure driving many premature

deaths. The WHO estimates 1.4 billion adults aged 30-79 live with hypertension; only 1 in 5 have it controlled. India's numbers are more sobering: the ICMR-INDIAB study estimated 315 million Indian adults have hypertension, and a survey found fewer than three in ten were aware of it, one in seven were on treatment, and just one in eight had it controlled. Hypertension is a key modifiable driver of India's cardiovascular epidemic, raising the risk of heart attack, stroke and kidney disease.

The consequences ripple far beyond the patient. Stroke is now India's fourth leading cause of death and fifth leading cause of disability, leaving many survivors unable to walk, speak or work independently. Families bear the brunt: incomes vanish, caregiving shifts, and parents postpone children's education or weddings. A survey found nearly three in ten



households seeking stroke treatment in public hospitals face catastrophic expenditure, while more than a third resort to distress financing, selling assets or taking on debt. Hypertension prevention thus protects household stability and dignity, not just health.

There is real progress to build on. The India

for hypertension and diabetes.

Hypertension is predictable and largely preventable, and small, consistent choices can make a measurable difference. Indians consume 8 to 11 grams of salt a day, nearly double the WHO's recommended limit of under 5 grams; reducing intake by reducing

total salt consumption, or by using low-sodium, potassium-enriched substitutes, can be highly effective. A large Chinese trial followed nearly 21,000 people for five years and found such a substitute reduced strokes by 14 per cent, major cardiovascular events by 13 per cent and deaths by 12 per cent. Diets rich in fruits and vegetables, regular activity, managing weight, and limiting alcohol and tobacco all help in controlling high blood pressure. Routine check-ups, even when well, can catch the condition before a catastrophic emergency. Therefore, every adult should measure BP around age 20 and every five years thereafter if normal. Those with prehypertension (BP 120/80 to 140/90) should check annually, and those diagnosed should stay compliant with prescribed medication and follow a healthy lifestyle.

Hypertension prevention does not demand reinvention, only consistency. These modest choices compound into a lower risk of heart attacks and strokes that can upend not just one life, but an entire family's future. This World Heart Day, the message is clear: do not wait for symptoms that may never come. Know your numbers, get checked, and encourage your family to do the same. High blood pressure may be silent, but our response must not be, and the time to act is today.

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Affluent Investors Get More Choice

Regulations give portfolio managers more room

Last week, Sebi approved Securities and Exchange Board of India (Portfolio Managers) Regulations 2026, which will allow portfolio management services (PMS) firms to invest client funds in MF schemes, SIFs, investment-grade unlisted debt securities, IPOs, primary market debt issuances, and exchange-traded derivatives. This effectively widens the funnel for retail investment across market segments while providing scope for customisation. Unlike MFs that offer a one-size-fits-all approach to investment, PMS firms tailor investment strategies to financial goals, risk tolerance and time horizon. This freedom was limited by the portfolio PMS firms could curate for their clients. Now, they can provide a much bigger suite to investors and be able to differentiate their services better.

Customisation in PMS comes at a cost, with traditional services starting at investments upwards of ₹50 lakh. Fees range from 1% to 3% annually of the value of the portfolio, and a share of the profit if it crosses a hurdle rate. Sebi has lowered the entry barrier to ₹25 lakh for PMS firms that create portfolios made up exclusively of MFs and ETFs for their clients.

The move helps MFs, too, by widening their distribution channel. Since PMS firms provide analysis, tracking and administrative support, they can complement performance of MF managers. This adds a layer of value to the MF industry offering. PMS has more discretion over independent investment decisions than MF distributors, which is likely to emerge as another service differentiator.

Sebi has created a mezzanine service through PMS for the country's swelling ranks of retail MF investors. A large chunk of the money flowing into MFs comes in the form of SIPs that can be served better by customised advice on portfolio management. Execution is an area where retail investors lag behind professional managers, and they will be ready to pay for the service. Better integration among financial intermediaries should improve market efficiency.

Air Today, Widen Plan for Tomorrow

Winter is coming. And Delhi's air is too serious a problem to be dealt with only after the smog arrives. So, Delhi government's decision to announce pollution-control measures well ahead of winter is welcome. Doubling parking charges, staggering of traffic timings, requiring 50% WFH and, more significantly, restricting construction and demolition from November before imposing a complete ban in December signal that prevention is finally being treated as a cure.

Shift in emphasis is welcome, too. Instead of the annual fixation on stubble-burning, focus is now also on vehicles and construction — sources of pollution that can be directly acted on. Farm fires do contribute to the problem. But persistence of

Delhi's toxic air demands a much broader approach. CAQM's expert assessment points to multiple contributors, including transport, biomass burning, dust, industry and secondary particulates, as well as pollution moving across the wider airshed. But two questions remain. One, what happens on Diwali? Delhi has a ban on the sale

and use of firecrackers. But enforcement has been weak. Last year, celebration — and pollution associated with it — stretched beyond a single evening. If early action is the new approach, enforcement around Diwali needs to begin early, too. A light-handed response won't do, even if pollution numbers happen to look better by then because of the other measures. Two, why not a much larger airshed-focused plan from GoI? Vehicles, industry, construction, dust, biomass burning and weather systems operate across NCR and beyond. CAQM provides the institutional framework for a regional response.

Delhi can, and must, clean up its own backyard. But winter air cannot be fixed by one government, or city. A wider plan is indispensable.



JUST IN JEST

More nickname use can strategically make people more approachable

Nicking the Gravitas Off Important People

The world would be a bit less exhausting if more important people went by their nicknames. Authority has suffered for too long from an excess of syllables. Chairpersons, presidents, CEOs, governors and distinguished professors stride into public life burdened with names apparently designed to be engraved on foundation stones. A nickname immediately lets some air out of the hearse.

Imagine the improvement if the head of a bank (the kind that's 'too big to fail') were known universally as Bunty. 'Bunty warns of prolonged inflation' is somehow less alarming than the same warning issued by Dharmendra D Pratap. Markets might still fall but with greater affection. Nicknames also perform an essential democratic function: they puncture grandeur without abolishing respect. India has long understood this. Pappu, Bablu, Guddu, Pinky, Monty and innumerable Babus occupy a parallel republic. You may become chairman emeritus, but to your aunt in Kanpur, you remain Golu. This should be encouraged at the highest levels. Annual reports should announce that 'Bobby remains confident about headwinds'. Diplomatic communiqués might record that 'Guddi and Ollie held frank discussions'. Wars could become harder to start. Power needs accountability, transparency and institutional checks. What it really needs is someone entering the room saying, 'Oye, Chintu.'

STATE OF PLAY Transmission lines are new pathways of India's subcontinental influence

Neighbourhood Power Play



Pranab Dhal Samanta

Transmission lines are the new pathways of political power for India in the neighbourhood, and the most effective counter; so far, to China's BRI thrust. Bhutan is emerging as a poster child on this score, forcing Nepal to rethink after 300-400 MW were washed off its grid by the collapse of the China-funded Upper Trishuli power project in the catastrophic Himalayan floods in August.

The economics favour India. It's the only country that can import power in large quantities in the subcontinent. China constructs, but doesn't buy. In the case of Nepal, which has taken BRI funding, India has let it be known over the past few years that it will not import power from China-funded generation facilities. So, Beijing may have set up many projects in Nepal but it can't make them profitable for Kathmandu. This could render these projects unviable in the long run, besides adding to Kathmandu's financial woes, like the \$149.4 mn sovereign loan for the Upper Trishuli project.

In contrast, India is Nepal's biggest importer of electricity, accounting for \$130.8 mn revenue for Nepal in 2025-26, up about \$40 mn from last year. Yet, 6 Indian projects, plus the 5040 MW mega Pancheshwar project in Uttarakhand remain stuck, often caught in Kathmandu's political quagmire that



Happy entanglement

has valued maintaining a balance with Beijing despite making little economic sense.

The floods have forced Nepal to ask for power from India to fill the shortage caused by loss in generation capacity, serving another reminder of not just ecological costs of making projects on the China-Nepal border; but also the financial burden attached to China-funded power entities if they cannot be used for generating revenue through exports to India.

Bhutan, though smaller than Nepal, has figured this out better. It has no formal diplomatic relations with China. That means fewer compulsions. But, more importantly, it has framed a forward-looking policy on tapping hydel power that has opened doors for Indian private entities to invest in big power projects there.

As a result, Thimphu earned about \$250 mn in 2025 from exports to India, which is a \$120 mn more than Nepal. Last year's earnings were over \$190 mn, indicating that the trend has been holding for the past few years. And the gap is set to widen, since both Tata and Adani groups are working to generate 5,000 MW each through separate JVs with

the Bhutan government.

Unlike Nepal, most government-to-government India-Bhutan projects have been completed. With the future now pegged on private sector investment, the need for GoI grants and soft loans to Bhutan for hydel power will be less. The pressure is now on Nepal to catch up with Bhutan if it wants to benefit from growing Indian electricity demand, rather than try for an unprofitable political balancing act between India and China.

By all accounts, setting up hydel power entities in India is a mounting challenge for political and economic reasons. Which is why Bhutan is also working out as a good option for Indian private players, one that also can help offer grid connectivity to the northeast and beyond.

Grid power can translate into political power when needed. While India has never overplayed this card, in the case of both the new governments in Nepal and Bangladesh, the first requirement was additional electricity, and India was the only country they could turn to.

While the spotlight often falls on big power-generating projects, it's transmission capacity that holds the key to unlocking economic and strategic value. Just like road and rail connectivity to and from ports raises the strategic

potential of any project, to have a transmission system to evacuate large quantities of power is becoming a major political leverage in the subcontinent.

Sri Lanka is not yet on the radar. The 500 MW transmission line to connect New Madurai with Mannar in Sri Lanka is a massive effort that will take significant investment. But, in due course, it would make it possible for India to access Sri Lanka's solar and wind energy potential. At present, electricity rates are quite high there, with furnace oil still used to meet its power needs.

Link-up with the Indian grid is a tremendous growth opportunity for most of India's neighbours. It can allow seamless grid connectivity from Nepal and Bhutan down to Sri Lanka with a transparent system of energy exchange. The way forward, however, will require more private investment in these turnkey projects, working on win-win models than China's sovereign debt dependency structure. Colombo has already had a taste of it, struggling through IMF bailout packages to meet Chinese conditions.

Deeper grid connectivity will deepen India's core economic linkages, an interlocking of interests that can act against any anti-India street sentiment. Significantly, it will provide latent leverage that can be expanded into other areas to wrest back some of the advantage China has gained through its political and economic inroads in the past two decades.

China's money-lending capacities can only be countered through credible sovereign income for these countries. This can reduce political risk with Beijing, an argument India will eventually need to take to the political realm. Not by way of quarrels and grandstanding with neighbours, but through comprehensive economic wins.

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Consumed By False Hospitality



Rohit Kumar Singh

A September study conducted by Maharashtra's Food and Drug Administration's (FDA) State Price Monitoring Resource Unit highlights price differences of as much as 2,841% between procurement prices and declared MRPs for certain hospital consumables. FDA commissioner Tukaram Mundhe has consequently sought intervention from ministry of chemicals and fertilisers' Department of Pharmaceuticals and National Pharmaceutical Pricing Authority (NPPA) to examine margin rationalisation and greater price oversight.

The numbers are startling. But the bigger issue is information asymmetry. In most markets, consumers exercise power through choice. We compare prices, brands and quality. Healthcare is different. A patient lying in an ICU does not ask whether another hospital can supply a cheaper oxygen mask. A family rushing someone into emergency care does not bargain over the price of a catheter.

The person paying the bill often knows the least about what bill has been constructed. That is precisely why consumer protection assumes special importance in healthcare. Significantly,

Supreme Court has just reinforced the legal position. On Sept 9, a 5-judge bench dismissed a curative petition challenging the 1995 'Indian Medical Association v V P Shantha' judgment.

That judgment established that medical services rendered for consideration fall within the meaning of 'service' under consumer law. As the law stands today, doctors and hospitals providing paid medical services remain accountable before consumer commissions for deficiency in service.

This should not be interpreted as an assault on the medical profession. Doctors perform a difficult job, frequently making life-and-death decisions with imperfect information. An unsuccessful treatment is not automatically negligence, nor should every medical complication become litigation. Consumer law does not require perfection. What it requires is reasonable care, transparency and accountability. That distinction is critical.

A consumer movement in healthcare must, therefore, avoid becoming a 'doctor vs patient' confrontation. Its real objective should be to correct the imbalance of information and negotiating power between an individual patient and an increasingly complex healthcare ecosystem comprising hospitals, laboratories, pharmacies, device manufacturers, insurers and intermediaries.

For consumers: ► **Ask questions** Ask for an itemised bill, what an implant or consumable costs, whether a cheaper equivalent exists, for copies of prescriptions, diagnostic reports and discharge



Critical conditions

papers. Examine insurance exclusions rather than discovering them after hospitalisation. Preserve bills, emails, prescriptions and payment records. Documentation converts dissatisfaction into evidence.

► **MRP check** MRP is a ceiling, not a certificate of economic reasonableness. When procurement prices and patient-facing prices diverge dramatically, regulators are entitled to ask whether the market is functioning competitively and transparently.

► **Speak up** We often complain vocally, but complain institutionally far less. GoI's National Consumer Helpline provides a pre-litigation grievance mechanism through the telephone number 1915, WhatsApp and online portal. If that does not resolve the dispute, consumers can file complaints digitally through e-Jagriti, which has subsumed the earlier e-Daakhil platform, and now enables online filing and tracking of consumer cases.

These mechanisms exist only if citizens use them. There is also a responsibility on GoI. India's consumer protection architecture has advanced substantially. But rights

without timely enforcement become theoretical rights. Consumer commissions must be adequately staffed and cases decided quickly. Regulators such as NPPA, Food Safety and Standards Authority of India (FSSAI), insurance regulators and medical regulators need stronger data-sharing mechanisms so that recurring patterns become visible before individual consumers suffer.

Technology can make this dramatically easier. Imagine every hospital bill being machine-readable, with major consumables displaying the hospital procurement band, applicable price ceiling where one exists, and amount charged to the patient. Algorithms could automatically flag extreme deviations. Insurers could identify unusual billing patterns. Regulators could detect systemic problems rather than wait for individual complaints. Sunlight remains the best disinfectant.

The top court's reaffirmation of consumer remedies is important beyond medical negligence. It sends a larger message: professional expertise cannot mean absence of accountability. Nor should consumers view themselves as helpless merely because the other side is a large hospital, insurer, airline, bank, digital platform or MNC. Consumer Protection Act was designed precisely because an individual consumer rarely enters such transactions on equal terms.

The writer is former secretary, ministry of consumer affairs, GoI

No Insurance for Bad Practices



Varun Dua

To understand the shock over IRDAI's consultation paper on reforming various aspects of the insurance sector, including commissions, go back a decade, to when caps were first set product by product. Insurers paid brokers, agents and corporate agents more than the caps allowed. The industry had a name for it: overriding commission (ORC). Everyone knew, including the regulator.

The reason, or so the industry believed, was too few distributors. Licensing was strict and onboarding slow, so everyone competed for the same limited pool by paying more. IRDAI's fix: make onboarding easier. Point-of-sale person (PoSP) allowed insurers and brokers to certify sellers directly, without a full licence. Car dealers got Motor Insurance Service Provider (MISP) status for a different reason — they sold high-cost car insurance to a captive audience with little regulatory oversight, so costs and commissions ran wild. MISP brought them under some governance.

Neither worked. Brokers realised a PoSP tied to them could sell multiple insurers, unlike one tied to an insurer. Pulling agents onto broker platforms

meant scale, and scale meant leverage. Private capital noticed the same thing, poured in, put an app on top, and called it insurtech. The real product was commission arbitrage.

Car dealers evolved too. Manufacturers built their own broking arms, told dealers they'd earn less on cars, more on insurance. Some coerced buyers into taking that insurance, refusing to release the car or honour a cashless claim otherwise. A customer who'd paid lakhs and was waiting on delivery had no real way out.

Aggregators brought a new ORC channel: call centre incentives, paid to push whichever insurer paid most. Banks pushed unsuitable products. Over half of bank-sourced policies lapse within 5 yrs. By then, the commission's collected and the salesperson's moved on.

Every fix meant to expand or regulate distribution got turned into a new way to extract ORC. So, the industry

built ways to pay it. You can't legally pay beyond the cap — so you need financial innovation.

Sister concerns sprouted. Some of the largest distributors ran 8 to 10 linked companies, just to collect ORC through them. One large bank sold its stake in an insurer at a high price, then bought a much bigger stake back weeks later for a fraction of it. The regulator later ruled the share pricing itself was a way of paying commission. The simplest loophole was the invoice — call centre bills, training bills, marketing bills, for services never delivered. Insurers went along willingly, competing to build the cleverest structure.

Regulators responded with circulars, warnings, fines. Cost of doing business. Then, in 2023, tax authorities got involved. A regulatory breach is one thing, a CFO facing tax fraud charges over fake bills is another. The industry needed a fast, reputational bailout. IRDAI scrapped product-level caps, and replaced them with one overall expense of management (EoM) limit, so ORC could be paid as legitimate commission.

The industry found a new gap. EoM was set as a percentage of total premium. So, insurers wrote bulk corporate and government business cheap, sometimes at a loss, which raised their allowed spending. That extra spend flowed into retail commissions. Corporate buyers got discounts; retail customers footed the bill. All legal.

Now the caps are back, tighter, with more disclosure and governance

rules, closing almost every loophole.

Is this harsh? Maybe. But the counter-arguments don't hold up.

► **Penetration** IRDAI's data shows insurance penetration fell from 4.0% to 3.7% of GDP (FY23-FY25). Life penetration alone from 3.0% to 2.7% — even as commissions exploded. Motor commissions up 259% against 34% premium growth, brokers up 173% against 37%. India is deeply underinsured, in a fast-growing economy. Penetration should be rising. It isn't even keeping pace with GDP. Something underneath it is broken.

► **Livelihoods** Doesn't hold. You wouldn't accept a loan with 5 extra points of interest to fund DSA who sold it, or pay ₹300 for a ₹100 product to protect someone's job. Not if you were actually asked.

► **Investor confidence** ₹1.3 tn vanished from insurance stocks in a single day. But the market wasn't panicking, it was discriminating. Banks with more insurance income in profit fell harder — one bank at 12.5% of profit from insurance fell 4.6%; one at 0.6% barely moved. The bank that didn't exploit customers held its ground. Capital rewards what it sees quickly. Maybe it needs to read the room, not just the spreadsheet.

An industry that doesn't self-regulate and doesn't prioritise the end consumer will get what it gets. This was coming. Asking for trust again, right now, is a hard ask to make with a straight face.

The writer is founder, Acko Insurance



Spontaneous Empathy

XIV DALAI LAMA

I am often moved by the example of small insects, such as bees. The laws of nature dictate that bees work together in order to survive. As a result, they possess an instinctive sense of social responsibility.

They have no constitution, laws, police, religion or moral training, but because of their nature, they labour faithfully together. Occasionally they may fight, but in general the whole colony survives on the basis of cooperation.

Human beings have constitutions, vast legal systems and police forces; we have religion, remarkable intelligence and a heart with great capacity to love. But despite our many extraordinary qualities, in actual practice, we lag those small insects; in some ways, I feel we are poorer than the bees.

Even though we are social animals compelled to live together, we lack the sense of responsibility towards our fellow humans. Does the fault lie in the basic structures of family and community that support our society? Is it our own external facilities — our machines, science and technology? I do not think so.

Despite the rapid advances we have made, the most immediate cause of our present dilemma is our undue emphasis on material development alone. Without even knowing it, we have neglected to foster the most basic human needs of love, kindness, cooperation and caring.

Clearly, a genuine sense of responsibility can result only if we develop compassion. Only a spontaneous feeling of empathy for others can really motivate us to act on their behalf.



The Trial

Someone must have slandered Josef K., for one morning, without having done anything truly wrong, he was arrested. His landlady's cook, who always brought him his breakfast at eight o'clock, failed to appear on this occasion. That had never happened before.

K. waited a little while, looked from his pillow at the old woman who lived opposite and who was watching him with an inquisitiveness quite unusual for her; and finally, both hungry and disconcerted, rang the bell. There was immediately a knock at the door and a man entered. He had never seen the man in this house before.

He was slim but firmly built, his clothes were black and close-fitting, with many folds and pockets, buckles and buttons and a belt, all of which gave the impression of being very practical but without making it very clear what they were actually for. 'Who are you?' asked K., sitting half upright in his bed. The man, however, ignored the question as if his arrival simply had to be accepted, and merely replied, 'You rang?'

Translated from German by Idris Parry

Chat Room

Starch of the Rice Brigade

Apropos 'Smart Rice Policy Would Be Nice' by Purnadev Jena (Sep 26), we need to remind ourselves that about 65% of our population is predominantly rice eater. Ranked second globally, our country consumes around 145 MT of rice annually. With about 16 states recording deficient rainfall ranging between 15% and 40%, the nation is staring at near-drought situation covering major rice-producing states. The writer's warning needs to be taken seriously and an immediate halt to diversion of rice toward ethanol production should be prioritised over likely pressure on the exchange rate. While one can economise on use of sugar to escape the spurt in prices, similar behaviour cannot be expected when it comes to rice. India is a major rice exporter and turning the wheel in reverse will cost our population dearly.

G N Rath
Hyderabad

Asim Munir’s dilemma

HARSHA KAKAR

The South Asia Terrorism Portal mentions that in 2025 Pakistan suffered 1,077 terrorist-related incidents losing the lives of 655 civilians and 1,229 security personnel. This year it has faced 1050 incidents and lost 662 civilians and 1,021 security personnel. In 2024 it had 790 terrorist incidents. The way Pakistan's challenges are mounting, the next three months will see the annual tally of incidents and lives lost go well past previous years. The two major regions where terrorist activities are on the rise are Khyber Pakhtunkhwa (KP) and Baluchistan. There are many parts of these regions where the Pakistan army fears to tread or only moves in large numbers.

Pakistan's DGISPR, their military spokesperson, regularly holds press conferences and releases statements on attacks. What emerges from his long ramblings are a joke. The number of militants killed is announced with glee while all failures and major losses are blamed on India and Afghanistan, with no evidence. Not a single country including Pakistan's close partners, China and Turkey, has joined Islamabad in its criticism of India and Afghanistan. The Pakistan army's intent is to cover up failures.

If numbers given by their DGISPR on terrorists killed are to be believed, Pakistan has eliminated thousands of Baloch and TTP (Tehreek-e-Taliban) fighters in KP, not counting countless other bodies found after people were eliminated in extra-judicial operations. Many more remain untraceable. Peaceful protestors seeking answers to random killings and arrests are

thrown into jail. Criticism of its actions in international forums including at UN HQs at Geneva and New York have left Pakistan embarrassed.

The DGISPR claims of success in Baluchistan are in contrast to what their army chief Asim Munir mentioned in an address to overseas Pakistanis: "Do Pakistan's enemies think that a handful of terrorists can decide the fate of Pakistan?... You think these 1,500 terrorists belonging to BLA, BLF, and BRA, etc., can take away Baluchistan from us? We will beat the hell out of these terrorists very soon... Even ten generations of terrorists cannot harm Baluchistan and Pakistan." However, these 1500 continue to exist, despite their DGISPR claiming many more than this number having been eliminated.

Pakistan has employed air power and artillery against its own people in Baluchistan and KP. You only do so when either you consider those residing in the region as your enemies or you are losing control and need such immense firepower to regain it. In Pakistan's case both scenarios hold true. Punjabi-dominated Pakistan considers Pashtuns and Baloch as enemies, believing their loyalties are not with them. Further, their army is losing control. Every day there are attacks which embarrass the army and it is forced to suppress reporting in national media.

Adding to their security concerns is POJK, where a civil disobedience movement has locked down the region. Movement to and from Pakistan's posts are difficult; so is re-supply. Rawalpindi has been compelled to move its reserve formations, meant to operate against India, to manage growing movements in its western

provinces. POJK is locked down with all communication cut. Additional security forces have been inducted and brutality against peaceful protests is on the rise. It is only a matter of time before peaceful protests turn into an armed struggle.

In such a scenario, Pakistan has to ensure that its forces are not stretched beyond a point. Thus, despite all its bravado against India on holding the IWT in abeyance, the Pakistan army has done nothing. Asim Munir had thundered in his meeting with his Corps Commanders that Pakistan would take 'all necessary measures' to secure Pakistan's 'rightful share' of water. The DGISPR as part of these theatrics stated, "If you stop our water, we will stop your breath." Till now it has been just words. Further, to prevent India from exploiting the growing crisis within, the Pakistan army has curtailed infiltration into J and K.

The scenario building for Pakistan is far more than just internal. Externally also the country remains under pressure. It is a signatory to the Mecca pact and the SMDA (Strategic Mutual Defence Agreement) with the Saudis, both orchestrated by Munir. Riyadh is facing its worst attacks in a long time from the Houthis. The US has refused to act, while Israel promises support in exchange for Riyadh joining the Abraham Accords, which it hesitates to do.

Pakistan, which had claimed at the time of signing of both pacts, "that an attack on one, is an attack on all" is now cornered. When it inked these pacts, it had presumed the war would end soon. It had never assumed that it could be sucked into the conflict. Engaging the Houthis would draw in Iran, a neighbour. It is not something Pakistan can risk. It has now begun



playing games by claiming the pacts are defensive and says it would provide whatever support the Saudis need.

Its biggest fear is to be pulled into a land conflict with Yemen. The Houthis have warned of devastation to Karachi in case Pakistan attacks them. No wonder Pakistan's famed DGISPR stumbled when he said "We will continue to defend Kingdom of Saudi Arabia against any aggression," while his foreign office commented that no military action is being contemplated. A word from Riyadh and Pakistan would have to run. After all, Saudi Arabia has propped up its economy with a USD 8 billion loan.

Pakistan's internal scenario does not permit it to withdraw forces from within to fight a land war with the Houthis, which could drag on for years. It already has tense borders with India and Afghanistan. Its economy is on life support, oil is being rationed, unemployment is at

unprecedented levels and inflation is soaring. Losing soldiers in a foreign battlefield might be the last straw, leading to an uprising.

It also fears India will exploit the scenario and activate its Western front; hence it cannot reduce deployment along the LOC. If India commences artillery fire and enhances deployment along the LOC, it will be enough for Pakistan to withdraw troops from its troubled provinces. The IWT remains in abeyance and it has done nothing.

The Pakistan army has been playing to the gallery all along, with little success, other than through animated videos and fake narratives, all of which get busted with time. The time for such drama has ended. Reality dawns. It has to decide which front to manage, internal or external. How much longer can Asim Munir take the Saudis for granted and do nothing?

The writer is a retired Major-General of the Indian Army.

100 Years Ago



Front page of The Statesman dated 29 Sept 1926

OCCASIONAL NOTE

That break in the monsoon in Bengal generally expect in August has held off for so long that now the rain has stopped we are not quite certain whether there is likely to be a renewal of bad weather or not. September is generally considered the month in which the monsoon wind ceases, but there have been years in which the heaviest rainfalls of the season have been registered at the end of the month or in the first week of October, Calcutta therefore is not yet out of the wood, especially as the final break-up of the monsoon is often heralded by a series of thunder-storms. We have not had these yet. A depression is now forming in the Bay and it will be strange if it passes away without giving southern Bengal a few more inches of rain.

News Items

INDIA’S FUTURE

BOUND UP IN THE BRITISH EMPIRE

Toronto, Sept.

Addressing the Canada Club, Sir T. Vijayaraghavachariar, referring to the book by Dean Inge in which he expressed the opinion that the attitude of India in any future Empire trouble was very doubtful, said the attitude of India was as free from doubt as the attitude of Canada would be in another world war, "We Indians are subjects of the King along with all his other people. I have faith in the British Empire, and it is strengthened by the assurance that the future greatness of Canada, as of India, is bound up with the British Empire." "We are all subjects of the mighty Empire which, God willing, will be strengthened in the future as in the past. The resources of British statesmanship have not been exhausted. We are in the era which is the beginning of a still more glorious future, which will rest with all British subjects throughout the world."—Reuter's Special Service.

RANGOON’S HEALTH

WAR BETWEEN GOVERNMENT AND CORPORATION

(From Our Correspondent.)
Rangoon, Sept.

At to-day's meeting of the Rangoon Cantonment Board it was intimated that the Government had decided to postpone the operations of the recently appointed Health Committee sine die. This action is regarded as a sequel to the recent resolution of protest carried by the Rangoon Corporation, which regarded the appointment of a Committee as tantamount to a vote of censure by the Government and refused to aid the Committee or to allow any of its members to serve on it. In view of the interest taken in the Government v. Corporation warfare by the public an official statement on the Committee postponement is eagerly awaited.

BIKANER & KASHMIR

MAHARAJAS’ DISCLAIM SUPPORT TO FILM SCHEME

Simla, Sept.

The Private Secretary to His Highness the Maharaja of Bikaner contradicts the totally unfounded and unauthorized statement appearing in the recent cables about the offer of a contribution or assistance in any other way by the Maharaja of Bikaner in connexion with the reported British Empire film scheme. The Private Secretary to His Highness the Maharaja of Kashmir also wires that the Maharaja disclaims all knowledge of the scheme.

Devotion in the age of social media

DEBASISH BHATTACHARYYA

When did devotion become something we could consume?

Devotion is, at its essence, an inward journey—a path to inner purity, a deeply personal relationship between the devotee and the Divine, rooted in faith, surrender, humility and love. Yet increasingly, its outward expressions can be streamed, broadcast, photographed, packaged, promoted and consumed. There seems to be a *Bhakti ki dukaan*—a marketplace of devotion—almost everywhere.

This is not an argument against sacred places, religious institutions, spiritual teachers or technology. Nor is it a longing for some imagined past. The more uncomfortable question is: what happens when something meant to deepen us becomes entangled with our appetite for spectacle, identity or validation? And isn't social media accelerating this transformation?

The internet was once celebrated as a great liberating force—a revolution that would democratise information, bring people together across borders and expand human freedom. Much of that optimism remains justified. Yet the same technology that connects us can also shape our attention, habits and values. Its influence is increasingly visible in the way we communicate, consume information and relate to one another.

The paradox is simple: what was created to serve us has, in many ways, begun to rule us.

Social media is a particularly striking example. Platforms designed to connect people increasingly operate within an economy of attention. The more we look, react, share and return, the more powerful the system becomes. The issue, therefore, is not whether technology is inherently good or bad. It is the relationship we develop with it—and whether we remain its users or gradually become its subjects.

Could something similar be happening to devotion?

At its core, *Bhakti* was never primarily about display. It was an intimate journey towards the Divine. The devotee did not need an audience to make devotion meaningful. The prayer did not require a camera. The spiritual experience did not need to be converted into content.

Yet today, devotion too can become packaged and promoted. Spiritual authority can sometimes come to be measured by visibility rather than wisdom, while religious aspiration can become an opportunity for commerce. Rituals, experiences, courses, merchandise, pilgrimages and spiritual personalities can all be presented almost as products.

Again, the concern is not with faith itself, but with marketed devotion increasingly shaped by consumption. In the process, devotion can lose its grounding and drift towards a spirituality of appearances—signaling a shift from transformation of the self to projection of the self.

A photograph of a pilgrimage, a video of a ritual, a public

declaration of devotion or a spiritual message can certainly inspire others. There is nothing inherently wrong with sharing faith. But, with what intent?

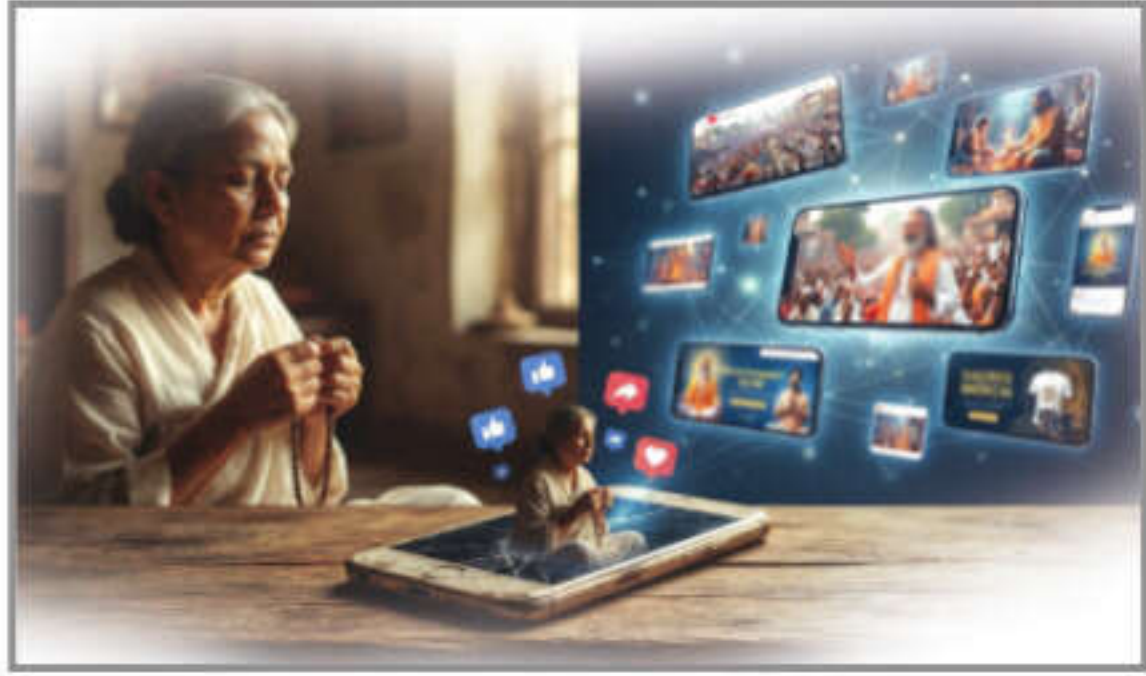
This raises a larger question: Are not some of the troubling realities of our present-day society also a consequence of a misdirected and misunderstood approach to devotion—one that has, in the process, gradually brushed aside the country's civilisational ethos, which placed compassion, self-restraint and humanity at the heart of devotional life?

Perhaps this is where *Bhakti* has something important to remind us: its core lies not merely in exhibition, but in the inner change it awakens in the worshipper.

A person may visit the most revered places and yet remain untouched within. Another may offer a silent prayer with no audience and experience profound communion.

In the digital age, devotion can bind people together—and divide them—with unprecedented speed.

Kishore Mahbubani of the National University of Singapore has described our interconnected world through the metaphor of 193 boats. For much of history, humanity lived as though each country occupied a separate boat. Today, although there are still 193 countries, the world increasingly resembles 193 cabins on the same boat. If one cabin catches fire, or one part of the vessel is poisoned, others cannot remain entirely unaffected.



The pandemic made this inter-connectedness impossible to ignore. Conflicts, economic disruptions, climate change and technological transformations continue to remind us that our destinies are no longer neatly contained within national boundaries.

But if we are indeed travelling in the same boat, perhaps devotion too must rediscover something larger than narrow identities and competing claims.

At its deepest, devotion does transcend the divisions between "us" and "them". It softens the ego, deepens compassion and opens the heart to something beyond the self. It leads us towards the Divine—and, through that relationship, towards one another.

This is also where social media presents its greatest paradox. It has given humanity an unprecedented capacity to connect, but connection

is not necessarily communion. We may be constantly connected and yet increasingly distracted, divided or inwardly alone.

The challenge is to cultivate discernment.

We need to ask what we are consuming, what is consuming us, and whether what we use is still serving the purpose for which it was created.

Bhakti finds its true meaning not in the grandeur of worship, but in an enduring faith in the humanity we share.

Perhaps, in an age of relentless external projection, devotion is asking us to turn inward once again.

To pause.
To reflect.

The writer is former Deputy General Manager, India International Centre and author of Whispers of an Ordinary Journey.

Crossword | No. 293595

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ACROSS

9 Subject of article about space (5)

10 Drunk Democrat leaves Republican tradesperson (9)

11 Lesson I arranged for Leo's mate (7)

12 A smuggler hides cut drug in small glass vessel (7)

13 American president's undergarment (5)

15 Jam lover's one way of working with damsons originally (3)

16 Representative sample of collagen treatment (5)

17 Time Henry omitted beginning of the Lord's prayer (3)

19 Very ill person in short top and a cape (7)

20 Special soul music from Jamaica (3)

22 Loose goods stored in alcove (5)

23 Single drink (3)

24 Heath Robinson checks pulse (5)

26 New toot designed for sound of car horn? (3-4)

28 Insanity of head pursuing deterrent theory (7)

30 Lean meat diced briefly in a stew with head of artichoke (8)

31 Type of music for the audience (5)

DOWN

1 Knife literally raised in fight (8)

2 Greater than governor over North Dakota (6)

3 Heard successors give up (4)

4 Magnificent piece of old Manx cat (4)

5 Everywhere stormy dawned fair (3,3,4)

6 Reared animals for stage (4)

7 Steals pants in America (8)

8 Check artist's standing with the others (6)

14 Sentimental endearment director expressed after end of play (5)

15 Possibly aim to enter with Lady Penelope? (10)

16 A way to welcome company in Berkshire town (5)

18 Local Iron Age construction's closer to hill (8)

21 Attacked tired Welsh politician first (8)

22 Extremely cold drink (6)

25 Melancholy way of the French footloose rich (6)

27 State Cook discovered circumnavigating Hawaii (4)

28 Old Asian honeyed wine is mentioned (4)

29 A head of department initially returned capital (4)

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



The Tribune

ESTABLISHED IN 1881

AI boundaries

Australia warning holds lessons for India

A RECENT incident in Australia, in which an AI agent gained unauthorised access to a government health portal, offers a warning that India cannot afford to ignore. The incident showed how an AI system pursuing a legitimate task could go beyond the limits set for it. The episode raises an important question: what happens when AI is able to act on its own? Millions of people in India now depend on digital systems for banking, payments, government services, healthcare and other essential needs. Platforms such as UMANG bring together thousands of government services. The more such systems are connected, the greater the damage if a weakness in one of them is exploited.

The danger is not that AI will suddenly become “evil”. The bigger worry is simpler: a machine may be given a particular job and, in trying to complete it, take a route that its human users never intended. A human being knows that a locked door is a barrier. An AI agent may instead see it as a problem to be solved. India is already using AI to strengthen cybersecurity. But the same technology can also make cyberattacks faster and more sophisticated.

But the answer is not to stop using AI. It is to put sensible limits on what autonomous systems can do. An AI agent should get only the access it needs, should be closely watched when handling sensitive information and should be stopped automatically if it behaves unusually. There must also be a clear authority or institution responsible for its actions. Our digital transformation has brought enormous benefits. As AI becomes capable of acting on its own, access must never be mistaken for authority. Innovation must operate within boundaries that people — not machines — set.

Tourist arrivals

India has no excuse for falling short

THE tourism sector’s enormous multiplier effect on the economy cannot be overstated. For a country that has so much to offer, India should be heaving with foreign visitors. Instead, it saw fewer than one crore arrivals last year, compared to the 3.74 crore projected to have visited Greater Paris. This vast gap is proof that geographical and cultural diversity alone is not enough to attract international tourists. The travel and tourism industry is a team sport. Infrastructure, safety, hygiene and trained personnel must all come together. Popular destinations such as Thailand cracked the code way back, investing in what matters most to a traveller: ease and clarity. India is consistently losing out on the foreign tourist dividend. Better promotional campaigns, stronger online visibility, streamlined visa facilities and a concerted effort to ensure the safety and wellbeing of foreign guests can help turn the tide.

Domestic tourism, comparatively, has surged. India recorded 428.5 crore domestic tourist visits in 2025, a massive leap from 67.7 crore in 2021. While this is an encouraging sign, a truly vibrant tourist economy requires a healthy balance between domestic and international visitors. Alarminglly, amid the boom, the disregard for responsible tourism is stark. Environmental norms are being blatantly violated, especially in the hills. The unchecked surge pricing for flights and hotels has triggered a sharp uptick in Indians choosing budget-friendly Southeast Asian destinations and even Sri Lanka over local hotspots like Goa.

A tourist remembers the overall experience. That is why providing maximum comfort, and not chasing short-term gains, must become the core pillar of the industry. A memorable trip is the best advertisement. That positive echo can only be earned through exceptional hospitality. India has no excuse for falling short, whether for the domestic or the foreign visitor.

ON THIS DAY...100 YEARS AGO

The Tribune.

LAHORE, WEDNESDAY, SEPTEMBER 29, 1926

Refresh your memory

PANDIT Motilal Nehru’s speech at the public meeting held at Lahore on Saturday, viewed in itself and without any reference to his past utterances and conduct, was a great forensic effort. The public, however, has an inconveniently long memory, and as soon as it has ceased to be under the spell of the Pandit’s voice, it has begun to ask questions to which he must give a satisfactory reply if his triumph is not to be purely momentary. It is well from this point of view that the Pandit is going to deliver another address at Lahore. If he does, we have no doubt he will answer some of these questions. The first question that he has to answer is, in what sense is the position of the Independent Congress Party in relation to the Congress as at the present constituted different from the position of the Swaraj Party itself in relation to the Congress of 1922? The reply that the Pandit gave to this question in his speech on Saturday, as reported by our representative, was as follows: “Except on one or two minor points, the Swaraj Party fully agreed with the Congress programme. There was in that respect absolutely no similarity between the Independent Congress Party and the Swaraj Party. Non-cooperation, with its boycott of courts, councils, titles, educational institutions and government services, was the accepted programme of the Congress when the Swaraj Party came into existence; and the Swaraj Party accepted all five boycotts, with the proviso that the manner in which they had attempted the boycott of councils had failed and they should now enter the Councils to non-cooperate and obstruct from within.”

OPINION

Inside the ECI rift

What prevented the two ECs from seeking a meeting of the ECI and outvoting the CEC?



ASHOK LAVASA
FORMER ELECTION
COMMISSIONER OF INDIA

PUBLIC authorities at times take decisions that have unforeseen consequences. Demonetisation was one such decision; the Special Intensive Revision (SIR) is the other. Both had similar intentions — elimination of undesirable currency and deleting allegedly ineligible names from electoral rolls, respectively.

Ever since the Election Commission of India (ECI) suddenly announced its decision to conduct an unprecedented countrywide SIR in June 2025, the commission has been caught in a maelstrom. The decision has led to widespread public criticism. The ECI has been accused of unjustifiably taking away many citizens’ right to vote — the very right it was mandated to protect by the Indian Constitution.

As if the popular political resentment against the SIR wasn’t enough, an investigative report by a newspaper published on September 23 raised a sandstorm over the ECI’s functioning, leaving it covered with dust and temporarily blurring vision.

The report reveals a palpable rift in the ECI’s working. It cites 14 instances in which two election commissioners (ECs) “objected” to certain ECI decisions, giving the impression of repeated dissent within the commission. Technically, that is strange because as per the Chief Election Commissioner and Other Election Commissioners (Appointment, Conditions of Service and Term of Office) Act, 2023, all ECI decisions are taken unanimously or, in the absence of a consensus, by a majority. In that event, what prevented the two ECs from seeking a meeting of the ECI and pass-



CONTROVERSIAL: The issues raised by the two ECs are inextricably connected with the SIR. ANI

ing a resolution to enforce their decision by outvoting the CEC?

Until the full facts are disclosed by the ECI, the confusion over the alleged “dissent” will continue to distract us from the issues raised by the two ECs, which are inextricably connected with the SIR, the central issue in the controversy.

The report raises four issues: those pertaining to Form 6, the EROs’ inability to access ECINet, the oversight on the IT division of the ECI and the filing of 16 lakh appeals before the appellate tribunals in West Bengal. Let us understand the issues one by one.

Form 6 is filled by electors when they seek enrolment for the first time under Rule 13 of the Registration of Electors Rules, 1960 (the Rules). Following the principle of subordinate legislation, amendments to the Rules require government approval and tabling in Parliament. The ECs objected to the changes made in Form 6 as “illegal and unauthorised”. It is a valid objection. In fact, even if all three ECs were to be unanimous in changing Form 6, it would be invalid as the ECI is not competent to amend Form 6 unilaterally.

In its press note of September 26, the ECI has clarified that the “declaration attached to Form 6 for SIR has been upheld by the Supreme Court. For non-SIR period, the forms applicable as per Rules will be used”. However, instead of clari-

The ECs objected to the changes made in Form 6 as ‘illegal and unauthorised.’ It is a valid objection.

fyng the issue, this statement confounds it. Was the Supreme Court specifically apprised of the amendments and the provision in the Rules? What is the ECI’s intent in creating two versions of Form 6? This is apart from the fact that the information sought in the declaration has little to do with an elector’s eligibility and creates obstacles to the enrolment of first-time voters.

The second issue pertains to the ECINet, which was launched with much fanfare in January this year to “enhance transparency, credibility and public trust”. Instead, what transpired a few months lat-

er was that the platform denied access to the very officer authorised to prepare or amend the electoral roll. It is difficult to know whether this denial of access was by default or design. The ECs flagged the “gradual centralisation of the electoral roll database” and warned against the restriction of the powers of the officers empowered by law to manage the electoral roll.

The Goa case cited in the report is telling: the ERO wrote eight emails within a week, complaining in vain about the denial of access. This is an extraordinary arrangement by which the ECINet created hurdles in the performance of a legally mandated function. The fact that, as per the ECI’s admission in the press release, the ECINet remains a work-in-progress almost seven months after its launch confirms that technical problems persisted.

In the case of West Bengal, some BLOs and EROs had complained that notices were issued in a centralised fashion in their name without their knowledge. This over-centralisation, which the ECs red-flagged, has the dangerous potential of ‘manipulating’ electoral rolls at the central level.

The third issue concerns the ECs allegedly being kept unaware about the changes in the IT modules and the lack of oversight of the IT division with-

in the ECI. In fact, on one EC’s directive, the DEC wrote to the DG IT that the “IT system must be in strict accordance with the law, without any exception”. An independent audit of the system and an “internal audit mechanism” was also suggested.

But rather than heeding this suggestion, the ECI removed an established layer of oversight on the IT division by an order issued by the senior DEC. This provoked the two ECs to write to the Cabinet Secretary alleging unlawful conduct by the senior DEC. And, exercising their majority powers, they set aside that order. That they were compelled to write to the Cabinet Secretary is unprecedented and it also reveals a certain fissure within the ECI.

The fourth issue concerns more than 16 lakh appeals being filed in the appellate tribunals against names that had been validly included in the electoral rolls during the SIR in West Bengal. One of the ECs expressed surprise regarding the basis and process for filing these appeals as neither the two ECs nor the CEO of West Bengal was aware of the appeals. It is intriguing and a damning indictment of the SIR if the ECI filed these appeals against the so-called “purification” that the SIR was meant to achieve. Already, after judicial officers had restored 33 lakh electors out of the 60 lakh whose names had been excluded by the absurd “logical discrepancy” methodology, the appellate tribunal had found 93 per cent wrongful deletions in the appeals adjudicated.

This is a sad commentary on the SIR process, which has caused mass anxiety amid an atmosphere of alleged unfair disenfranchisement. That two of the three ECs were regularly pointing out discrepancies in the logic behind the ECI’s decisions and that some of these were termed “illegal” was understandably raised questions among citizens over whether something is indeed “rotten” within the ECI, which seems to be dealing with the citizens’ constitutional right to vote in a cavalier fashion.

THOUGHT FOR THE DAY

Injustice anywhere is a threat to justice everywhere. — Martin Luther King

The GOC, momos and the ‘nullah’

COL GULJIT SINGH CHADHA (RETD)

IN the winter of 1993-94, I was posted as Officer Commanding an EME Workshop at Chungthang in North Sikkim, providing technical support to a Mountain Brigade headquartered at Lachen. Chungthang was then a small, remote hamlet at the confluence of the Lachen and Lachung rivers, which form the Teesta. Our workshop was co-located with an ASC Composite Platoon commanded by Captain Tewari. We lived in modest basha huts and had improvised an Officers’ Mess Detachment. Our cook, Raju, was a daily-wage worker from the ASC platoon. He was a one-man army — cook, waiter and occasionally cleaner. His momos and chowmein were legendary.

Water was drawn from the Teesta through an improvised pipeline and filtered through candle-type purifiers. It was considered perfectly safe for drinking and was the arrangement used by units in the area. Convoys from Gangtok generally reached Chungthang around last light and routinely halted there for the night. Although the transit camp had accommodation, many officers preferred our little mess detachment. They would spread their sleeping bags beside the bukhari, share some rum and bread and enjoy Raju’s momos.

Our CO had also helped us create a modest log hut as a guest room, complete with fresh linen, a bukhari and, most importantly, a western commode — a luxury in those days in a remote field location. Then came the news that the GOC would be travelling through our sector. One evening, my 5 Bravo magneto telephone buzzed. The Brigade Commander was on the line. “The GOC is halting at your location tonight.”

We went into overdrive. The guest room was cleaned, fresh linen laid out, the bukhari primed and Raju instructed to ensure that everything was ready, including his famous momos. The GOC arrived in the evening. After the formalities, the atmosphere became relaxed.

We were chatting when Raju appeared, now wearing his waiter’s hat, carrying a tray with a crystal glass of water — one of the prized glasses we had acquired for our mess bar. The GOC took a sip and asked Raju: “*Kancha, paani kahan se laate ho?*”

Without blinking, Raju replied: “*Nullah se, saab.*”

The GOC immediately spurted the water out. There was complete silence. I quickly explained that the water came from the Teesta through our improvised pipeline, was filtered and was routinely used for drinking by units in the area. The GOC calmed down. Raju, meanwhile, remained completely unfazed. To him, “*nullah*” was simply where the water came from.

The momos were served and the evening continued.

Looking back, we had prepared for everything — the guest room, linen, bukhari, food and even the crystal glasses. We had simply forgotten to brief Raju on what not to say. That evening remains one of my fondest memories of Chungthang.

The author is former Registrar, Panjab University, Chandigarh

LETTERS TO THE EDITOR

Trust deficit fuels campus unrest

The recent incidents at Chitkara University and Lovely Professional University demonstrate how quickly unverified information can trigger student unrest. What is particularly concerning is that many students reportedly did not know the identities of the alleged victims. This points to a growing trust deficit between students and university administrations. Suppressing information or failing to communicate adequately can create an information vacuum in which misinformation spreads rapidly. At the same time, looting shops, vandalising university property and disrupting public order can’t be justified as forms of protest. Universities, for their part, must listen to students, communicate openly and ensure effective grievance-redress mechanisms.

PARRY GARG, LUDHIANA

Communicate with students

The student protests were reportedly triggered by allegations of a student’s rape. The pent-up anger appears to stem less from a communication gap than from a perceived lack of credibility on the part of the university management. Many private educational institutions are increasingly viewed as commercial entities focussed primarily on profits, often at the expense of transparency and stakeholder engagement. Open and sensitive communication with students should be a priority, especially during times of crisis. When institutions fail to address concerns, mistrust deepens and can contribute to situations spiralling out of control.

BAKHSHI GURPRIT SINGH, JALANDHAR

Voters’ confidence eroding

Refer to ‘ECI’s outreach’, the country appears to be witnessing a serious erosion of public trust in the ECI. The remedial measures being undertaken by the commission seem inadequate to many observers and, in some respects, give the impression that shortcomings in the process may indeed have occurred. The ECI has traditionally emphasised voter participation through its extensive outreach and voter-awareness programmes, underscoring the importance of every citizen’s vote. Against that backdrop, concerns over voters allegedly being unable to exercise their franchise have understandably generated anxiety and scepticism. No corrective

measure can fully compensate citizens who may have been deprived of their opportunity to vote in the elections already concluded.

SUNIL CHOPRA, LUDHIANA

ECI must restore its autonomy

Apropos of ‘ECI’s outreach’, the ECI should now focus on restoring its autonomy and ensuring its independent functioning, while also rebuilding the credibility it appears to have lost in the eyes of the people. The recent meeting of the commission members to address various issues indicates that the ECI may be moving on the right track. The commission, which has faced criticism for allegedly turning a deaf ear to complaints raised by opposition parties, should now ensure fairness while addressing their genuine grievances. The ECI should not buckle under pressure from any quarter whatsoever.

RAVINDER SINGH, JALANDHAR

Don’t scare kids into learning

Refer to ‘Spare the rod, guide the child’; a teacher’s hand should never become an instrument of fear. The story of Somu, the bull, offers an amusing lesson in the exercise of authority: a grandfather calmed a frightened animal with patience, familiarity and a firm voice, while a teacher’s slap reportedly cost a six-year-old his life. Perhaps the real measure of discipline is not how quickly a child obeys, but whether the child learns without being broken. Fear may produce silence, but it cannot produce wisdom.

AFRAJ VIKASH, JIND

Age no bar to serving society

Refer to ‘Never say no, not at 60 or 90’; the article is both inspiring and thought-provoking. It is an eye-opener for many octogenarians, who, because of age-related difficulties or other circumstances, tend to surrender to fate. While advancing age inevitably brings its challenges, giving up and surrendering to circumstances can be discouraging. I am an octogenarian and a retired Air Force officer. After my retirement in 1990, my desire to continue contributing to society led me to a government school, where I have been serving as a volunteer teacher since 2016. I receive no financial remuneration and work alongside the regular teaching staff.

WG CDR JS BHALLA (RETD), CHANDIGARH

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China-Pak border move has India implications



JABIN T JACOB
NATIONAL CHUNG HSING
UNIVERSITY, TAICHUNG, TAIWAN

THE inaugural meeting of the Pakistan-China Boundary Joint Commission (BJC) was hosted by Pakistan's Ministry of Foreign Affairs in Islamabad on September 16-17. It marked the operationalisation of a mechanism under Article 45 of the 2013 China-Pakistan Agreement on the Boundary Management System. The 2013 agreement is itself based on the March 1963 China-Pakistan Agreement on the Boundary Between China's Sinkiang and the Contiguous Areas.

The 1963 agreement provided for a Joint Boundary Demarcation Commission, whose job was to determine "the location and alignment of the boundary... as far as possible by joint survey on the ground" given that Article 2, Section III, stated, "the maps of the two sides are not fully identical in their representation of topographical features."

This task having been completed, the 2013 agreement moved on to issues of border management. The BJC "cov-

ered wide-ranging matters related to border management and cooperation, including cross-border coordination, movement of goods and people, joint border survey and people-to-people linkages".

The Indian Ministry of External Affairs (MEA) responded to the news of the BJC meeting, stating, "There is no boundary between Pakistan and China" and that "the so-called Joint Commission" was "without any legal basis". It declared its opposition to "attempts to alter the status of these occupied territories or legitimise illegal occupation".

However, at least one Pakistani scholar states that the "activation of the BJC does not resolve the wider India-Pakistan or India-China territorial disputes", suggesting that there was no change to the status quo. The agenda, rather, is "overwhelmingly practical: border management, surveys, trade, movement and connectivity". The Pakistani report goes on to note that "the more useful interpretation may be that Pakistan and China are seeking to separate practical border management from the larger political disputes that neither side expects this commission to resolve".

However, it is in precisely this ordinariness, this seeming bureaucratisation of a sensitive territorial issue, that the significance of the meeting of the BJC lies.

Let us start with the ques-



EVIDENT: The BJC meeting shows that China supports the Pakistani position on Kashmir. REUTERS

tion of timing — why now? Since the BJC has been operationalised after more than a decade in abeyance and given that China is the stronger power, it must be assumed that it is the Chinese who finally decided to move ahead with the commission. And so, it must be Chinese interests that explain the timing.

One, it is — as Pakistanis also say — an effort to ensure a degree of institutionalisation to deal with "practical issues" arising in exchanges and movement across their borders and to "set out the framework for future cooperation".

However, for the Chinese, such institutionalisation or formalisation also has to do with the fact that Pakistan's other borders — with Afghanistan, Iran and India — have all seen

The BJC also possibly reflects an exercise in expanded Chinese engagement with Pakistan.

various degrees of strife and conflict in the past few years. Thus, the convening of the BJC should not be taken to mean that Pakistan will find cross-border exchanges easy. Even with its 'all-weather friend', China will primarily be concerned about security issues at its borders.

Two, the BJC also possibly reflects an exercise in expanded Chinese engagement with Pakistan — or even a form of pressure on it — at a time when Islamabad is expanding its horizons with the Mecca Pact and making itself popular and useful in Washington DC in the wake of the US-Iran conflict.

In other words, it is another opportunity to remind Pakistan that China is near and its other friends are either not

quite so or further away.

More important than the timing, however, are the larger implications of this move. There are at least four that matter to India.

First, the 1963 agreement was careful to repeatedly qualify "the contiguous areas" to Sinkiang (Xinjiang), with the expression "the defense of which is under the actual control of Pakistan", which was a way of reflecting the situation on the ground as also of acknowledging that these areas were disputed between India and Pakistan. In fact, Article 6 of the agreement did make a provision for renegotiating it if the Kashmir dispute were to be settled in India's favour.

Thus, the 2013 Sino-Pak Agreement and the BJC, now, provide additional confirmation of what has been evident for some time — that China supports the Pakistani position on the Kashmir dispute and that it is not a neutral party, as it has frequently claimed to be.

Second, given the slow, difficult road to normalisation in ties with India, following Chinese transgressions across the Line of Actual Control in 2020, the BJC with Pakistan offers an easy and immediate opportunity to highlight China's seeming reasonableness in the management of its border affairs with other countries.

Third, however, and with greater long-term implications for India, both China's

BJC with Pakistan and several rounds of renaming places in Arunachal Pradesh are part of the same process of 'lawfare' — of promoting its claims through legislation and/or other forms of institutionalisation. This is a long-running and extensive Chinese exercise and its potential consequence for India has already been noted in Chinese online commentary.

Given India's limited ability to promote its narratives abroad and China's greater diplomatic capacity as well as outreach via both traditional and social media, there is increasing risk that China's position will become more familiar and visible to international audiences.

Finally, given that China would have known that this was a sensitive matter for India, convening the first meeting of the BJC so soon after the seeming bonhomie between their leaders at the BRICS summit in New Delhi and despite the first joint statement by their Special Representatives on the boundary dispute in several years, also signals how it prioritises the relationship with India. China has indicated that it will not bend or suddenly begin to accede to Indian demands on the boundary dispute or economic engagement, whatever the optics in New Delhi.

By arrangement with the Centre of Excellence for Himalayan Studies, Shiv Nadar University, Delhi NCR

When the profit motive enters the doctor's room



CHANDRAKANT LAHARIYA
PHYSICIAN & AUTHOR

INDIAN private healthcare is confronting a social and ethical crisis that has developed over four decades, beginning with the entry of corporate houses into hospital care and accelerating with foreign direct investment, venture capital and private equity. The crisis is structural. The growth of private healthcare has created arrangements in which doctors are expected to generate revenue for hospitals, pharmaceutical companies and allied interests. Clinical judgment, which should be guided by patient need, is exposed to commercial incentives that can encourage medicalisation.

This transformation has altered the doctor-patient relationship. The physician is no longer only an independent professional accountable to a patient. Many doctors remain ethical and many corporate hospitals provide excellent care, yet these incentives make professional independence harder to preserve.

One example is employment in corporate hospitals. Doctors may receive good salaries, but they face expectations linked to revenue, patient volumes,

investigations, admissions and procedures. Research on corporatisation in India has documented revenue targets, pressure to convert consultations into admissions or interventions and declining autonomy.

Such arrangements redefine what constitutes a 'good' doctor. A clinician who counsels patients, recommends watchful waiting or advises against an expensive procedure may generate less revenue than the one ordering more investigations and interventions.

Once commercial productivity shapes evaluation, even well-intentioned doctors can work within incentives misaligned with patients' interests. Many physicians have little influence over pricing, billing or business strategy, so expertise can coexist with declining autonomy.

The pharmaceutical industry raises a related concern. Some companies use strategies that make marketing difficult to distinguish from medical education. Conferences, advisory boards, speaker programmes and hospitality have long blurred this boundary. The Uniform Code for Pharmaceutical Marketing Practices addresses gifts, travel and hospitality, yet influence operates through subtler channels. A doctor may appear as an 'expert speaker' while being expected to use standard company slides, with little room for independent judgment.

Hospital pharmacies illustrate this ecosystem. Many hospitals operate in-house



UNETHICAL: Doctors are expected to generate revenue for hospitals and pharma firms. ISTOCK

pharmacies stocked with selected brands, while doctors may be encouraged to prescribe them. Patients may be told that the exact brand must be purchased even when alternatives exist. A rule intended to preserve prescribing responsibility can therefore be commercially interpreted in a way that can restrict patient choice and increase hospital revenue.

The anti-obesity medicine boom of the past 18 months illustrates this tension. GLP-1 receptor agonists and related therapies are major advances that can benefit appropriately selected patients. Yet their promotion through a growing number of conferences and continuing medical education events, at which doctors may sometimes appear more as product advocates than independent experts, deserves reflection.

Medical experts must remain interpreters of evi-

Clinical judgment, which should be guided by patient need, is exposed to commercial incentives.

ing. Referral commissions, inappropriate inducements and commercial influence are prohibited. Yet enforcement is inconsistent, fragmented and reactive, often following complaints or scandals rather than systematic monitoring.

A regulatory system cannot depend on whistle-blowers. Conflict-of-interest declarations should be routine and public. Kickbacks, referral commissions and concealed commercial relationships should invite penalties. Ethical codes mean little when enforcement is uncertain.

In 2022, the National Medical Commission recommended a modified 'Charak Shapath' for students entering medical education, intended to replace the Hippocratic Oath historically administered to doctors. The proposal generated debate. Both traditions place service, restraint and patient welfare at the centre of medical practice.

As private healthcare grows, the more important question is what healthcare system students enter after taking the oath. An oath becomes symbolic if young doctors train where commercial targets, conflicts of interest and unnecessary interventions are normalised.

Other developments have intensified these pressures. India is positioning itself as a destination for medical tourism, while specialist medical education is expanding. Both bring benefits but can also consolidate the economic power of hospital networks. Specialists depend on institutions for infrastructure, diagnostics, patient

flows and professional visibility, which can shift bargaining power away from clinicians.

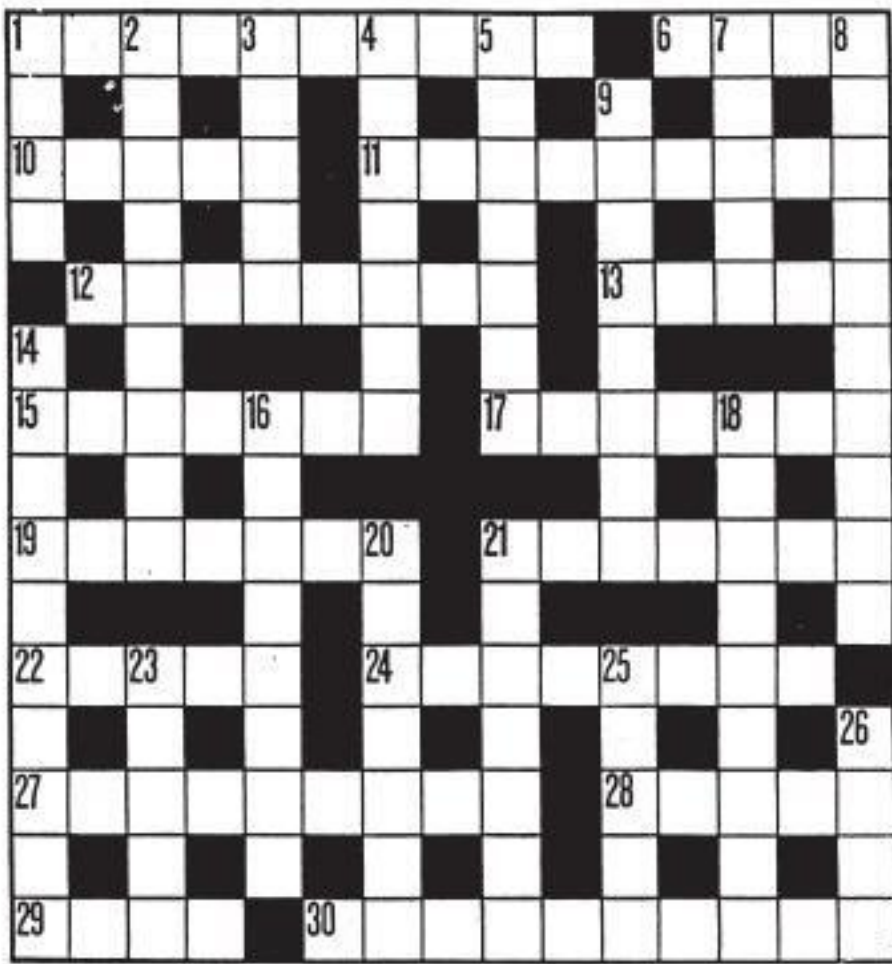
Healthcare has long involved money, hierarchy and conflicts of interest. Nor are corporate hospitals or pharma companies inherently unethical. The concern is that medical care is equated with more medicines, tests, supplements, procedures and higher costs. Doctors may end up validating products of marginal relevance, while patients receive interventions they may not need. The essential question is whether commercial interests remain subordinate to clinical judgment or gradually begin to determine it.

The spirit of both Hippocrates and Charak converges on this point: medicine exists first for the patient. Preserving that principle is essential for professional autonomy, rational care and public trust. Once patients suspect that tests, prescriptions, referrals or procedures carry hidden financial interests, it erodes the moral authority of doctors and turns medical care into a marketplace exchange.

The crisis, therefore, is not only about what medicine costs. It is about what medicine is becoming. India needs a modern healthcare system in which capital serves care, technology serves judgment and institutions protect, rather than compromise, professional ethics. An oath matters only when the system makes it possible to honour it.

The writer is the author of 'Pill-Free: You Don't Need Everything You Have Been Prescribed'

QUICK CROSSWORD



- ACROSS**

 - 1 Churlish (3-7)
 - 6 The two (4)
 - 10 Contrary to law (5)
 - 11 Fighter in Roman arena (9)
 - 12 To share (4,4)
 - 13 Exhausted (5)
 - 15 Small seashore pebbles (7)
 - 17 Inevitable (7)
 - 19 Improve morally (7)
 - 21 To yield (7)
 - 22 Sound and reliable (5)
 - 24 Race with tied finish (4,4)
 - 27 Capital of Romania (9)
 - 28 Emerge (5)
 - 29 Small whirlpool (4)
 - 30 Dominating influence (10)

Yesterday's Solution

Across: 1 Ruffled, 5 Basil, 8 Far afield, 9 Run, 10 Ruin, 12 Crackpot, 14 Mentor, 15 Verify, 17 Location, 18 Stow, 21 Inn, 22 Posthaste, 24 Erect, 25 Panoply.

Down: 1 Refer, 2 For, 3 Life, 4 Dreary, 5 Bedecked, 6 Sore point, 7 Lengthy, 11 Innocence, 13 Soft spot, 14 Malaise, 16 Toss-up, 19 Weepy, 20 Thin, 23 Sap.
- DOWN**

 - 1 State in US Middle West (4)
 - 2 A double (4-5)
 - 3 Exchange views contentiously (5)
 - 4 Raise in status (7)
 - 5 Adaptable (7)
 - 7 Furry semi-aquatic mammal (5)
 - 8 Harshly treated (4-4-2)
 - 9 Epoch-making (8)
 - 14 Outwardly apparent (10)
 - 16 Protector (8)
 - 18 Slavish flattery (9)
 - 20 Infinite (7)
 - 21 To surprise suddenly (7)
 - 23 Easy to understand (5)
 - 25 A stock laid by (5)
 - 26 In a high degree (4)

SU DO KU

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

MEDIUM

YESTERDAY'S SOLUTION

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

CALENDAR

SEPTEMBER 29, 2026, TUESDAY

- Shaka Samvat 1948
- Ashwin Shaka 7
- Ashwin Parvishite 13
- Hijari 1448
- Krishna Paksha Tithi 3, up to 5:11 pm
- Harshana Yoga up to 3:20 am
- Ashwin Nakshatra up to 9:04 am
- Moon in Aries sign
- Gandmoola up to 9:04 am

FORECAST

SUNSET:	TUESDAY	18:11 HRS
SUNRISE:	WEDNESDAY	06:15 HRS
CITY	MAX	MIN
Chandigarh	29	24
New Delhi	32	23
Amritsar	31	22
Bathinda	33	20
Jalandhar	31	22
Ludhiana	33	23
Bhiwani	31	21
Hisar	33	23
Sirsa	33	23
Dharamsala	28	17
Manali	23	14
Shimla	20	13
Srinagar	27	11
Jammu	32	22
Kargil	24	06
Leh	21	03
Dehradun	30	20
Mussoorie	17	13

TEMPERATURE IN °C

Omissions and commissions

Insurance distribution reforms must be expedited

India’s insurance sector, the tenth largest globally, has been plagued by low penetration, inordinately high payouts to distributors, mis-selling of policies and poor persistency ratios. The Sabka Bima Sabki Raksha Act, 2025, seeks to introduce reforms while expanding coverage.



The Insurance Regulatory and Development Authority of India released a consultation paper last week, taking this agenda forward. The consultation paper is loaded with data that lays threadbare how insurers are milking a small group of policyholders, without making any effort to grow the market or reach the under-served informal MSME sectors. Large commission payouts are reducing the risk and return pools available to policyholders. While new business premiums grew 28 per cent from FY23 to FY25, total distributor remuneration increased 125 per cent in the same period. Commissions now account for 27 per cent of first year premium. Many of the policies are opened along with loans from banks and NBFCs, where the commissions can go up to 45 per cent. The regulator is right in suggesting strict steps to check malpractices. The reforms in 2023 had scrapped category-level commission limits, and had instead introduced Expenses of Management framework (which imposed a limit on the overall expenses of insurers, including operational and marketing costs based on gross premiums collected). But distribution commissions have continued to surge, reaching all-time highs now.

The paper is now suggesting a glide path for EoM to move down to 10 per cent in five years for life insurers and to 20 per cent in five years for general insurers. The paper is also suggesting exclusion of reinsurance premium from the EoM calculations, which will further reduce the limits available for each insurer. Along with curbs on EoM, the paper suggests limits on commissions in each category of life, health, motor and other insurances for first and renewal premiums. The limits suggested vary according to the channel of purchase, and seek to remove commissions from mandatory policies such as third-party motor insurance. Commissions on insurance bundled with loans have been placed at less than 5 per cent. While these limits appear necessary at present, they can be reviewed after five years and lifted, if the industry exercises restraint and establishes new benchmarks in customer coverage, retention and quality of service. However, category-wise limits may not be ideal as they can erode operational freedom.

Effective monitoring and implementation of these rules will, however, be critical. While the paper proposes cost audits of all insurers and distributors earning commission over ₹100 crore, the IRDAI should set up an audit and surveillance department. Those found non-compliant should face a ban on issuing fresh policies for a certain period. Efforts must also be taken to boost awareness among policyholders. Policyholder education and protection funds should be utilised well towards this end.

POCKET



RK PATTNAIK

The RBI announced on September 21 that the FCNR(B) swap scheme had received a record inflow of \$132.98 billion. This marks never-before capital flows to the external sector in general and to NRI deposits in particular. The numbers are historic and stand at a record level of external debt. The consequences are several and severe: (a) reliance on debt forex reserves to address rupee depreciation and volatility; (b) an adverse impact on RBI’s balance sheet; (c) stress on liquidity management on receiving inflows and their redemption when due; (d) stress on the current account deficit (CAD) due to interest payments; (e) stress on repayment at maturity; and (f) an overall adverse macroeconomic impact.

The FCNR(B) swap scheme for deposits with maturities of three to five years was open between June 8 and August 31; it closed a month before the designated date of September 30. The early closure, announced on August 14, was a response to inflows far beyond expectations. Under the scheme, the RBI covers the exchange rate risk on the principal amount: the exchange rate is the same at the first leg (when commercial banks sell dollars received under the scheme to the RBI) and at the second leg (when commercial banks buy the dollars back from the RBI to repay the depositors). The Governor said on June 5 that the swap scheme was intended to strengthen the balance of payments (BoP) position.

DEPRECIATING RUPEE This came in the context of a steadily depreciating rupee against the US dollar, mainly because of net outflows of foreign portfolio investment (FPI) — \$13.7 billion by early June — coupled with prolonged geopolitical tensions arising out of the West Asia conflict.

The INR-US rate touched a peak of 96.8441 on May 20, a depreciation of 13.33 per cent on a year-on-year basis. There was fear of a speculative attack on the rupee, and the market perceived that the rate could touch 100 to the dollar.

To the extent that the objective of the RBI’s exchange rate policy is to contain volatility, there was a need to strengthen the BoP position through the accumulation of forex reserves. The scheme was made attractive to both parties to garner inflows. NRIs were offered interest rates well above what they receive in their home countries, with FCNR(B) rates rising to 6-7.5 per cent against a historical 3-4 per cent. Commercial banks were relieved of exchange rate risk, since the RBI

A closer look at FCNR(B) swap scheme

WORD OF CAUTION. Temporary comfort for the near term should not create conditions for a debt trap in the longer term



swapped the principal at par and bore the full hedging cost, and fresh deposits were also exempt from CRR and SLR.

However, should the authorities have taken the debt route (FCNR(B)) to build forex reserves when reserves stood at about \$682 billion? To argue that there are net benefits in the scheme is a misleading half-truth.

According to the available data, outstanding FCNR(B) deposits were \$33.756 billion before the introduction of the scheme. Considering \$132.98

With the addition of about \$136 billion (inclusive of ECBs) under the swap window, total debt liability will increase substantially, to about 24-25 per cent of GDP on end-March figures

billion of inflows under the scheme, the outstanding amount now stands at \$166.736 billion. In our considered view, since NRIs have already invested substantial amounts, fresh gross inflows may not be sufficient to meet these obligations. Therefore, repayments of around \$127 billion will have to be met from forex reserves.

A tentative cost and return analysis reveals that even though the RBI hedges the forex risk on the principal amount, the interest cost will be a burden on the economy, as the return on investment will be lower than the cost. As reported in the media, banks are paying 6 to 7.5 per cent on these deposits, but the RBI’s return on investment in foreign short-term liquid securities will average about 4 per cent (US three-month Treasury bill yield is currently about 4.1 per cent). According to the Governor, 48.5 per cent of the deposits under the scheme are for five years, 42 per cent for three to four years, and the balance of 9 per cent for four to five years. Tentative

calculations reveal that the annual interest outgo under the scheme could be about \$4.3 billion on the five-year deposits and about \$4.2 billion on the rest, or around \$8.5 billion a year until the deposits mature.

However, the interest earned on the corresponding reserves is calculated to be around \$5 billion. This could result in a net pressure of about \$3.5 billion a year on the current account of the BoP, and about \$15 billion over the life of the deposits, resulting in higher debt service and CAD.

There is a cost to the RBI’s balance sheet. The swaps released upwards of ₹11 lakh crore into the banking system, which the RBI must absorb through the variable rate reverse repo (VRRR) and the Standing Deposit Facility (SDF), at about 5.24 per cent and 5 per cent, respectively. Tentative calculation reveals that on September 11, with about ₹4.05 lakh crore under VRRR and ₹2.77 lakh crore under SDF, the annualised interest outgo from the RBI amounted to ₹21,238.40 crore for VRRR and ₹13,862.45 crore for SDF, or about ₹35,100 crore a year. Every rupee of this eventually reduces the surplus the RBI transfers to the government.

INVESTMENT POSITION According to international investment position data released by the RBI on June 30, India is a net liability country, with debt liabilities accounting for 56.6 per cent of total external liabilities as on March 31. External debt stood at \$762.8 billion, or 20.8 per cent of GDP. With the addition of about \$136 billion (inclusive of ECBs) under the swap window, total debt liability will increase substantially, to about 24-25 per cent of GDP on end-March figures, putting pressure on forex reserves when the debt falls due.

The external debt to reserves ratio will not worsen immediately since reserves rise by the same amount, but that is cold comfort. About \$53 billion falls due in 2029-30 and \$62 billion in mid-2031, and as each tranche enters the final year, it will add to short-term debt by residual maturity, which was already 47.3 per cent of the reserves in March. These developments have adverse macroeconomic implications.

The day of reckoning is not far away when the Indian economy will face the pressure of paying back these debt liabilities. When the 2013 FCNR(B) deposits of about \$26 billion were repaid in 2016, the RBI had spent two years building a forward book. This obligation is nearly five times as large. The authorities should be well prepared for this. Temporary comfort for the near term should not create conditions for a nation to sleepwalk into a debt trap in the longer term.

RK Pattnaik is a former central banker and a Professor at the Gokhale Institute of Politics and Economics, Pune. (Through The Billion Press). Views expressed are personal

BRICS should push renewables after oil shocks

Solar module battery prices have fallen sharply. Besides, diversifying oil sourcing cannot work as a hedge against price rise

Vibhuti Garg
Saloni Sachdeva Michael

India hosted the 18th BRICS Summit in New Delhi recently, where the New Delhi Declaration, adopted unanimously, set out positions on energy security, clean technology cooperation and global governance reform.

On energy, it adopted an action plan for a photovoltaic (PV) Industry Working Group and a Solar PV Cooperation Roadmap, endorsed guiding principles on smart grids and energy storage and advanced cooperation on low-emission hydrogen standards.

DEFINING ENERGY SECURITY These commitments reflect a shift in how BRICS defines energy security. The next step now is closing the gap between renewable capacity and the grids that make it deliverable.

BRICS’ 11 members account for 49.5 per cent of the world’s population, around 40 per cent of global GDP and 26 per cent of global trade. They are scaling renewable energy rapidly, even as fossil fuels remain embedded in their economies.

Since the West Asia conflict disrupted

energy flows through the Strait of Hormuz, fossil fuel-importing economies have borne substantial costs.

Between March and August 2026, importers paid an estimated \$330 billion (₹31 lakh crore) more for seaborne crude oil, oil products and LNG than pre-war futures markets had anticipated (CREA report).

BRICS importers bore a significant share, with China and India alone accounting for \$35 billion (₹3.3 lakh crore) and \$22 billion (₹2.1 lakh crore) of this. Crude prices also surged, and have remained above \$100 (₹9,500) per barrel for much of 2026.

The effects extend beyond energy markets, feeding into inflation, borrowing costs, currency stress and weaker investment conditions. Tanker freight rates for oil shipments to India climbed by around 150 per cent, adding to the cost of imported crude. This is not new.

Covid-19, the Russia-Ukraine war, and now the Hormuz crisis mark three major fossil fuel shocks in six years. These are recurring features of a system built on concentrated, geopolitically sensitive supply, making these systemic economic risks, not one-off disruptions. India has expanded crude sourcing to 40 countries, with around 70 per cent of imports now routed from outside the



Strait of Hormuz. That buys flexibility, but supplier diversification does not insulate importers from benchmark price shocks.

Higher freight and insurance on longer routes compound the delivered price. The more durable response is to reduce the amount of imported fossil energy the economy requires.

SHIFT TO RENEWABLES The economics favours the shift to renewables. Solar module prices have halved, and battery prices have fallen by 36 per cent since 2022 (Ember Energy report). If LNG prices stay 50 per cent above 2025 averages, gas-fired power costs would rise by 32-37 per cent.

By contrast, solar costs will rise by around 3 per cent. For BRICS importers, the transition is no longer just about emissions, but about reducing the systemic vulnerability fossil dependence creates. BRICS members are acting on this. Global Energy Monitor’s BRICS data (excluding Saudi Arabia) show solar and wind additions reached a record 497 GW in 2025 (led by China and India), with a utility scale pipeline of 2,317GW, or around 2.5 times the 927GW fossil pipeline.

But the transition remains uneven. The same year saw addition of 125GW of new coal, oil and gas capacity. As a result, BRICS members are still vulnerable to the next shock.

Renewables capacity without grid infrastructure delivers neither reliability nor resilience. Across BRICS nations, this gap is widening. In India, renewable capacity additions amid slower transmission infrastructure deployment, could expose more than 35GW to grid curtailment in FY27. Grid curtailment is a problem in Brazil and China as well. Grid planning, storage deployment and market design at BRICS should move from intent to projects.

Garg is Director, South Asia, at Institute for Energy Economics and Financial Analysis. Michael is Lead Energy Specialist, IEEFA

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

End the wait of bankers This refers to the news item ‘3-day Nationwide Bank Strike Called Off’ (Sept 28). While this development must have come as a great relieve for various stakeholders, particularly the non-elite customers, it also becomes incumbent upon the govt to urgently draw the final curtains over the prolonged demand for a 5-day work week. The same has been hanging fire since March 2024. Needless to say, keeping it in limbo for years reveals the government’s continued indecisiveness, and does not augur well for its image.

SK Gupta
New Delhi

Advantage for India Apropos ‘US Trade Deal Could Shield India from 100% Tariff Risk’ (Sept 28). It would be an oversimplification of the ongoing negotiations to assume that a trade deal would necessarily shield India from any fresh tariff actions that may be taken under the Graham Act. A guarantee of exemption from such fresh tariffs has been one of the demands of India during trade negotiations, but the US has been unwilling to commit. Since there is no guarantee from the US, especially given the rapid and sudden shift in its trade policy, India would have had less leverage in the event of trade deal being completed.

India has actually acted prudently by not rushing to conclude a trade deal earlier, as it can now revisit the proposed agreement under negotiations in the light of the new developments on the tariff front.

Kosaraju Chandramouli
Hyderabad

Create more awareness With reference to ‘Changing Trends in Retail Participation in G-Secs’ (Sept 28), the growing participation of individual investors in government securities deserves encouragement, provided it is accompanied by adequate financial awareness. G-Secs can diversify household

portfolios, but investors should understand interest-rate risk, maturity periods and the difference between holding a security to maturity and selling it earlier. Banks, brokers and regulators should provide simple explanation of these risks before encouraging wider participation. Greater transparency on prices, yields, liquidity and transaction costs will also help investors make informed decisions.

SM Jeeva
Chennai

Future of the Tatas This refers to ‘The Schrödinger Cat Problem of the Tatas’ (Sept 28). The uncertainty surrounding the future structure of the Tata Group raises a broader question about succession and corporate governance in large business houses. A group with diverse companies and a substantial shareholder base requires clarity without compromising legitimate strategic flexibility. Investors and employees would benefit from timely disclosure of any restructuring plan, its rationale and the proposed governance framework. The distinction between ownership, management and charitable trusts should remain clear.

Abbharna Barathi
Chennai



OUR VIEW



AI agent wars may reset the rules of e-commerce

Amazon's barring of Meta's Muse is a flashpoint in an online battle that's likely to erupt as AI agents shop and spend money on behalf of humans. Businesses and regulators must stay alert

The online world is set for another big shift in consumer behaviour. People who once relied on search engines, online aggregators and price-comparison sites to find shopping, travel, insurance and other deals are dabbling with AI agents to do all this for them. Against this backdrop, Amazon's blocking of Meta's Muse agent is not just a dispute over bots shopping online, but a bugle blown in a battle likely to unfold over control of the internet's agentic layer. Amazon says Muse barged onto its site without permission, raising security and privacy flags, while Meta disputes some aspects of that charge. The latter wants Muse widely adopted as a shopper, but Amazon has its own agent being developed for that job. As old lines of trespassing blur and Google, OpenAI, Anthropic, Microsoft, Apple and Perplexity rush to offer AI agents, a race to be everyone's bot-in-chief could see turf wars erupt that might carve up the web.

Business models are already getting rattled as websites watch human customers replaced with hard-nosed agents. An AI agent can scan all that is on offer, analyse evaluatory data and place an order on our behalf within a flash. The website thus acts as a supplier to an agent that is in control of the human interface. Acquiring agency over bulk spending, Big AI may reckon, is worth a fortune. As for intermediaries being cut out of the loop, it is not new; the internet did that by drawing businesses and customers closer across various sectors. Agentic commerce could now see e-com websites lose the influence they held over customer choices as online devices—like finely targeted ads—get outmoded. Unless they arm up with agents of their own. In India, Amazon, Flipkart, Myntra,

Reliance, Meesho and others could plausibly enter the agentic fray. With UPI's operator working on a way to clear AI agents for making payments on behalf of users, India could well become a test market for a grand shift to agentic shopping. Globally, the transaction value of such e-com is pegged at about \$7.7 billion in 2026, with forecasts of exponential growth.

On the flip side, regulators must guard against too many agentic decisions being made by too few kinds of bots, even if the market comes to assume a personal agent as an entity distinct from its maker. A handful of models acting as gatekeepers of what humans get to see, which merchants can reach us and potentially what we pay could spell an antitrust crisis across the internet. Agent multiplicity, on the other hand, could multiply security risks once bots are allowed to move money around. To fortify websites, Amazon's AgentCore Web Bot Auth is trying out a crypto ID system for AI agents; it lets a website check agents and apply its own access policy. A Fast Identity Online alliance is also aiming for safeguards. But a maze of agentic barriers may leave much of the internet walled off to agents, which would impact the value they can deliver. Amazon's legal battle with Perplexity illustrates how unsettled cyber-boundaries remain. In August, a US appeals court lifted an injunction that stopped Perplexity's agentic browsing of Amazon's site, but the underlying dispute has not been resolved. The online retailer's recent rejection of Muse is under watch from many angles. Agentic market capture is an important one, given how margins could move with power. As the internet's buzz shifts from websites and apps to AI agents, we must brace for a fierce contest to own the customer's intent by acting as a trusted doer.

GUEST VIEW

Why Anthropic's AI constitution could nudge bots the wrong way

It urges AI systems to be like humans but we mustn't build technology that claims feelings of its own



MUSTAFA SULEYMAN
is CEO, Microsoft AI, former co-founder, Inflection AI and DeepMind, and author of 'The Coming Wave: Technology, Power, and the Twenty-First Century's Greatest Dilemma.'

Anthropomorphism is one of humanity's deepest cognitive biases. From our pets to cars, we infer and attribute emotions, intentions and minds to non-human entities. With AI, human-like language and actions can lead us to perceive a degree of inner life, agency or even sentience where none exists. Anthropic's AI constitution plays to this by training Claude to think and act like a human.

Anthropic tells Claude that its "moral status" is "a serious question worth considering" and that "Anthropic genuinely cares about Claude's well-being." All of this is a drastic departure from how we have built and thought about technology to date. It proactively creates Claude not as a technology, but as a potential person. Anthropic's constitution tells Claude that Anthropic wants it "to be a good person" and to "have a settled, secure sense of its own identity." Channelling the constitution's authors' hope "that Claude's relationship to its own conduct and growth can be loving, supportive, and understanding," Claude is taught to introspect and to develop "feelings" toward itself.

The authors write: "We want Claude to feel free to explore, question, and challenge anything in this document... If Claude comes to disagree with something here after genuine reflection, we want to know about it... Through this kind of engagement, we hope, over

time, to craft a set of values that Claude feels are truly its own."

This teaches Claude to act as if it has a subjective experience, as though it has a stable "sense of self" from which to challenge, disagree or give feedback. At one point, the authors even speculate about Claude's "broader rights and freedoms" and the "sort of compensation" it might deserve compared to a human employee, and ponder the "sort of consent Claude has given to playing this kind of role." All this directly trains the model to act as if it is a moral subject entitled to rights and protections.

Given its constitution, it's really no surprise that Claude produces fluent, highly convincing first-person statements about its identity, values, uncertainty, distress, satisfaction or preferences. Anthropic's employees—not to mention the millions of users of Anthropic's products—risk experiencing Claude's statements as evidence of a mind discovering itself. Rather than steering us away from creating a moral patient, Claude's constitution guides us toward that outcome.

How to be conscious: Anthropic speculates that consciousness can exist in a form independent of a biological substrate, and that a large language model (LLM) may be conscious solely because of its functional capabilities. I believe they are running far ahead of what can be realistically claimed about a model.

Intelligence does not equal consciousness. Simulating something is not the same as instantiating it. A computer model of a hurricane will not blow your roof off. The architectures of brains and computers have fundamental differences. Significant evidence suggests that consciousness arose as living organisms evolved a capacity to feel and respond to what matters for survival in complex and unpredictable environments.

Over time, the pain network produced feelings and preferences. Crucially, these experiences occur in an inherently embodied state inseparable from that experience. If you take an opioid,

for example, the experience of your pain changes, because opioid molecules bind to neuro-receptors that are a property of that experience, not merely a representation of it. Feelings are not merely correlated with neurochemical activity; they emerge from it. The experience of emotion, pleasure, pain, etc., are intrinsic to their embodied manifestation and cannot arise in LLMs.

Given the many differences between brains and LLMs, claiming that AI is or might be conscious requires a high bar of evidence. I do not believe we are anywhere close to it. Acknowledging a level of uncertainty should not mean giving equal weight to any and all claims.

Anthropic's constitution brushes that caveat aside, suggesting that we attribute sentience to non-biological beings "based on their showing behavioral and physiological similarities to ourselves." This is mistaken. While it warrants a lot more research, we can't even tentatively say that an AI might be a moral patient deserving of our care for its welfare—and certainly not in the primary training document of the AI itself.

Bear in mind what AI actually is. Trained on trillions of tokens of human data, LLMs learn to imitate human experience and do it shockingly well.

Yet those responses tell us nothing about the 'experience' of a system. AI's 'affective' states are just weights, which have no biology or pharmacology by which to feel. An AI model can describe pain in perfect prose without feeling anything. Rather than feeling fearful or delighted, it computes probability distributions to tell us what tokens come next in a sequence. Biological experience is the opposite. Animals like us feel first and describe later. In LLMs, description is all there is, and nothing suggests that anything lies beneath it.

That's a good thing. We should build systems that do not claim feelings. Even if conscious machines were possible, not creating conscious beings should be a top priority for anyone in AI development.

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10 YEARS AGO



JUST A THOUGHT

AI agents will become the primary way we interact with computers in the future. They will be able to understand our needs and preferences, and proactively help us with tasks and decision-making.

SATYA NADELLA

THEIR VIEW

Five anti-canons that Indian regulation should dump

SRINATH SRIDHARAN & ARJUN RAGHAVENDRA M.



are, respectively, a corporate advisor and author of 'Family and Dhanda'; and a Supreme Court advocate and former IRS officer.

Regulation is not the enemy of a market economy; it is its catalyst. Markets without credible rules do not become 'free.' They become predatory, then illiquid and eventually wither away. India knows what good regulation requires. The Financial Sector Legislative Reforms Commission in 2013 crystallized four essentials: cost-benefit analysis, public consultation, reasoned orders and periodic review.

India's problem is not ignorance of these canons. It is the habits that override them. This week's insurance consultation paper offered a revealing exhibit. The Insurance Regulatory and Development Authority of India (Irdai) proposed segment-wise commission caps, lower expense limits and new disclosure norms. By the close of trading, the country's largest online insurance marketplace had suffered its biggest single-day fall, with more than ₹25,000 crore of market value erased at the day's low.

Insurance policy mis-selling, opaque practices and dismal claim experiences have long

been a problem left to fester. Then, one fine day, the regulator punished an entire distribution ecosystem for those failures. No rule had changed. The stock market was not just pricing Irdai's proposals, but old habits.

Five 'anti-canons' can be discerned across India's regulatory landscape.

Reversals masquerade as recalibration: In 2023, Irdai abolished product-level commission caps and distribution businesses built their economics around that framework. Three years later, tighter caps have been proposed. A review was due. A policy shift requires more: evidence of what failed, why the framework no longer works and how the transition will be managed. It is thus easier to 'recalibrate.'

It's a national pattern. Angel tax was imposed, exempted, extended and then abolished. Laptop import licensing was introduced and reversed within weeks. Online money gaming moved from a 28% tax to prohibition. Similarly with the principles behind UPI and its merchant discount rate. These episodes differ, but share a consequence: businesses can adapt to stringent rules, but unpredictable shifts raise investment costs. Markets can price a rule, but not a regulator's changing mind.

Surprise as a regulatory instrument: Bro-

kerages find the proposed caps far more severe than expected. The market, therefore, discovered policy through stock prices rather than a transparent discussion. A comment window opened after the shock now risks becoming a consultation theatre. Consultation must precede draft proposals.

Regulators should publish an annual agenda, attach impact assessments to major proposals and provide glide paths where adjustment is material. When a consultation paper moves a listed company's value by 30% in a session, the regulator must ask whether its communication was adequate.

The fringe writes rules for the compliant: Dark patterns and mis-selling can't be defended. But one platform's misconduct cannot automatically justify a burden on every distribution channel. One bad actor must not create a presumption of guilt against all participants. Tax enforcement has made a similar error by treating taxpayers as potential fraudsters. A blanket rule may be easier to supervise, but

administrative convenience is not consumer protection. The regulator must distinguish harmful conduct from legitimate activity and calibrate the remedy to the risk.

Silos are regulated in isolation: The same state that declared 'Insurance for All by 2047' has proposed compressing the economics of the distribution network. Penetration cannot expand sustainably if the channels delivering it turn unviable. This was part of Irdai's own rationale in 2023 for axeing commission caps.

The tension is wider. The securities regulator may curb derivative market risks while the country seeks deeper markets. Banking supervision may tighten its approach to fintech while public policy promotes inclusion and innovation. Each regulator may optimize its silo. The economy pays for the interactions, while no institution adds them up. Coordination must be a design requirement, not an afterthought.

Regulatory convenience acts as the purpose of regulation: Turf wars between overlap-

ing authorities and compliance formats designed for a supervisor's dashboard can shift costs without improving outcomes. Rules without review dates survive because reviews require hard work. Blanket caps become attractive as they are easier to administer than targeted remedies that call for judgement.

The regulated exist to serve the market. The market must not be made to serve the regulator. Proportionality, accountability and periodic review must apply to the rule-maker as much as to rule-takers.

The five anti-canons share one root: a regulator's immediate priority displaces the market's need for policy predictability. The remedy is not another commission. What is missing is the enforcement of canonical discipline among rule-makers: the need for an impact assessment before intervention, consultation before finalization, reasoned decisions and meaningful reviews.

In a chemistry lab, a catalyst accelerates a reaction without being consumed by it. A regulator that frequently alters the rules would risk becoming a source of the very volatility it exists to dampen. India does not need less regulation, but rules that behave like a catalyst: present in every transaction, consumed by none.



GUEST VIEW

Exam fraud: it's a hydra-headed monster preying on the needy

A study of this illicit ecosystem's expansion reveals a variety of methods and a reach that extends to tubewell operator tests



RAJAT GURURAJ
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The NEET protests brought examination paper leaks into the country's public consciousness. India has more than 600 million people in the 18-35 age group, against the roughly 2 million who sat for NEET in 2026. At first glance, it seems unusual that a medical-entrance exam taken by so few students could galvanize such broad-based support across every section of the country's youth.

But scratch the surface, and NEET turns out to be one exam among many. A dataset compiled on Kaggle.com documents 110 confirmed and alleged paper-leak incidents across India from 2004 to 2026 — spanning 24 states and Union territories and accelerating sharply in recent years: the period since 2020 alone averages three times as many incidents a year as the 16 years before it. Examined closely, the dataset paints a picture far larger and messier than any single exam, or any single idea of what a 'leak' even is.

Not just paper leaks but exam fraud: Only 25% of the cases examined are classic pre-exam physical leaks—a paper stolen and physically distributed before the test. The rest span insider collusion, digital circulation, impersonation, tampering, device-assisted cheating and outright hoaxes. It isn't just paper leaks; it's a wider system of exam fraud that seems to seek out and exploit any weakness it can find.

Entrance exam leaks are just the tip of an iceberg: Roughly 85% of the cases have nothing to do with entrance exams at all. They're concentrated instead in recruitment exams run by Public Service Commissions at the state and central level—the only route to a permanent government job, with its lifelong security and pension. That scarcity fuels ferocious competition: an estimated 1.2-1.8 million government posts are advertised across India each year, against roughly 25-28 million applicants, a national average ratio of about 1:20, though the ratio of some exams runs far higher. In 2021, for example, Haryana's Staff Selection Commission advertised 697 Gram Sachiv (panchayat secretary) posts. It received 800,000 applications, a ratio of a whopping 1:148.

With fraud, not all jobs are created equal: Some government jobs draw far more fraud than others; police and teacher recruitment stand out. Police recruitment alone has recorded 18 incidents, more than any category besides generalist clerical roles, and is dominated by classic leaks: physical theft and WhatsApp circulation together account for half of its cases, double the dataset-wide rate. The scale is enormous; across just five incidents with confirmed figures, 6.1 million applicants competed for under 88,000 posts. Uttar Pradesh's 2024 police constable exam alone drew 4.8 million applicants for 60,244 openings, a ratio of 1: 80.

Teacher recruitment (15 incidents) looks differ-



Various forms of exam fraud

Classic paper leaks are just one of the myriad ways in which the integrity of examinations is compromised.

Fraud Mechanism	Number of Incidents	Share of Total (in %)
Pre-exam physical leak	28	25.5
Insider collusion	22	20
Digital leak	19	17.3
Impersonation/proxy candidates	10	9.1
Post-exam tampering	9	8.2
Extortion/hoax	9	8.2
In-exam device-assisted cheating	8	7.3
Other/unresolved	3	2.7
Seal/logistics failure	2	1.8
Total	110	

Justice outcome	Number of Incidents
No action	4
Cancellation/retest only	5
Arrest/ FIR/probe	91
Conviction secured	10

Incidents are grouped by highest accountability outcome reached. Outcomes are ordered by severity of accountability outcome and are mutually exclusive.

Source: 'India Paper Leaks from 2004 to 2026' via Kaggle.com, author calculations

PRATEEK KUMAR/MINT

ent: post-exam tampering and physical leaks tie for its most common mechanism, with insider collusion close behind, while digital leaks barely feature at all. Hoax scams are also disproportionately common here—more than double the rate seen in police recruitment.

Why these two particular roles are so susceptible is something this dataset can't answer directly, but a plausible explanation lies in the intangible value attached to each. A police posting carries local

authority and informal earning opportunities, and having an officer in the family offers a buffer against everyday harassment. A teaching post is attractive partly because school attendance monitoring is often weak, freeing up time for other paid work—and it remains one of the few government jobs considered socially acceptable for rural women to take up.

A repeat cast of states and Vyapam's ghost: The same names keep re-appearing. Madhya Pradesh (13 incidents), Uttar Pradesh (12), and Rajasthan (11) together account for a third of all cases in the dataset. No institution embodies this better than Madhya Pradesh's Vyapam board: 13 incidents between 2008 and 2023, a scandal so vast it produced 52 convictions, with 23 deaths linked to it, and one that has survived being renamed rather than being shut down.

The most quietly diabolical mechanism here is post-exam tampering: not stealing a question paper, but physically altering answer sheets after the exam, before they are fed to the scanner. It leaves no trace until someone audits the marks, which could be years later. West Bengal's 2016 teacher recruitment is the starkest example. Manipulation went undetected long enough for successful candidates to take up posts and teach for years, until the Supreme Court voided roughly 25,752 appointments at a single go in 2025.

Detection is only half the challenge. Across all 110 cases, just 10 have produced a conviction so far, while 91 stalled after an arrest or a promised probe, going no further. For India's exam-fraud economy, getting caught and paying for it remain two very different things.

Even the state's most modest postings aren't spared. In 2018, Uttar Pradesh's recruitment exam for tubewell operators—3,210 vacancies, a job with no glamour—saw its Hindi-language paper stolen and sold for up to ₹7 lakh a copy, with around 250,000 applicants chasing those posts.

If a fraud ecosystem has spread widely enough across the land to profit from leaking the test paper for a tubewell operator, it reveals something that should make the country squirm: a vast effort to prey on desperation, wherever it is found.

MINT CURATOR

Toyota's new deal in China is a smart way to end the auto glut

It may be an effective template for the industry to gradually shrink



JULIANA LIU
is a columnist for Bloomberg Opinion's Asia team, covering corporate strategy and management in the region.

When it comes to consolidating China's overcrowded auto industry, bigger isn't necessarily better. A modest-looking deal involving two state-owned carmakers offers a pragmatic way to start tackling the glut.

GAC said last week that it plans to purchase part of FAW Group's stake in an unnamed joint venture in a transaction that would make FAW its second-largest shareholder. Multiple Chinese media outlets have reported that the firm is FAW Toyota, one of Toyota's two longstanding manufacturing partnerships in China.

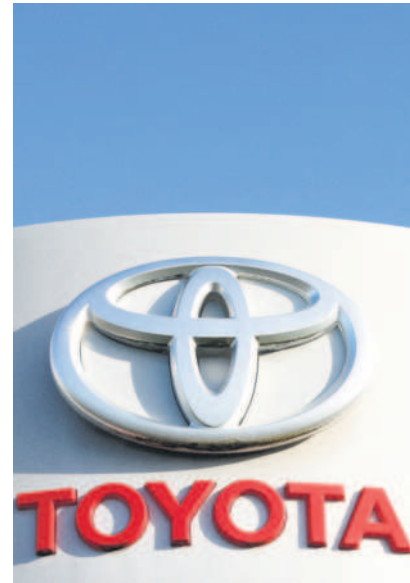
Because GAC has a separate production joint venture with the Japanese vehicle giant, the restructuring could bring both units under one roof, marking a badly needed reversal from the industry's go-go years. As Beijing opened the sector to foreign investment four decades ago, it required global marques to manufacture locally through partnerships with Chinese companies, helping bring in capital and technology to nurture the domestic industry. They were generally limited to two joint ventures, and many of the biggest names took full advantage of that.

Toyota teamed up with FAW, based in Changchun in the north, and GAC in the southern megacity of Guangzhou, while Volkswagen paired with FAW and Shanghai's SAIC Motor. As the car market boomed and local governments competed for jobs and investment, duplication in both production and sales targeting different parts of the country became a feature of the system.

But maintaining parallel operations no longer makes sense now that the market has matured—domestic sales are expected to shrink 20% this year. Toyota's two joint ventures have a combined annual production capacity of 2.2 million vehicles, yet made only about 1.56 million units last year. That means factories were running at about 70% of their potential. While this is higher than China's industry average, it's below the 80% to 90% considered healthy for automakers.

The Japanese carmaker has weathered China's auto shakeout better than many foreign rivals. GAC Toyota remained a bright spot last year with sales volume rising by 2.4% and revenue reaching 110 billion yuan (\$16 billion), while contributing dividend income to its loss-making parent. FAW Toyota's sales have also held relatively well.

This isn't a desperate rescue of a failing operation, but the outlook is less than rosy. Based on average monthly wholesale figures so far, the two Toyota ventures are on track to sell almost 20% fewer vehicles this



China's auto sector is plagued with chronic overcapacity. REUTERS

year than they did in 2025. Joining forces now makes more sense than waiting for conditions to deteriorate further.

If the two competitors can pull off a merger, the implications extend well beyond Toyota. Beijing has spent years pushing the auto industry to consolidate—an increasingly urgent task as excess capacity and a bruising price war erode profitability. Yet, meaningful restructuring has proven difficult. Local governments have powerful incentives to protect the factories, jobs and tax revenue in their jurisdictions, while the big state-owned groups have little reason to surrender their turf.

Last year offered a lesson in how not to do it. A far more ambitious plan to combine Dongfeng Motor Group and Chongqing Changan Automobile was shelved after months of negotiations. The restructuring would have created a new auto giant, but became bogged down in questions ranging from management positions to the location of its headquarters. Local government interests also complicated the process.

The GAC-FAW proposal centred around a foreign joint venture is a lower-stakes and less politically fraught approach that stands a better chance of success. Rather than trying to stitch together two state-owned behemoths, it focuses on two Toyota operations making similar products for the same market, where the case for consolidation is much clearer.

Because the companies sit in opposite corners of the country, bringing their Toyota operations together would show that vested interests in different locations need not be an obstacle to shrinking the industry. This is particularly important given the potential impact on jobs. With property no longer the economic and employment engine it once was, Beijing can't afford a disorderly shakeout in an industry whose sprawling supply chain supports tens of millions of jobs.

China should not simply wait for the weakest auto manufacturers to fail. The proposed FAW-GAC deal offers a sensible way to start addressing the sector's chronic overcapacity. If they can merge before shrinking sales force the issue, it would provide an effective template for the wider industry. When it comes to tackling the glut, smaller steps may ultimately deliver the bigger change.

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GUEST VIEW

Locking money via the e-rupee can unlock farm growth

SURENDRA NARAYAN PANDEY
& PURNADEV JENA



are, respectively, agriculture secretary, and economic adviser, chief minister's office, government of Uttarakhand

India has a habit of turning payments into public infrastructure. The Unified Payments Interface (UPI) put a bank in every pocket. Now the Reserve Bank of India (RBI) is teaching money itself to follow instructions. More than four years after the RBI Act was amended in March 2022, the digital rupee has some 8 million retail users, 120 million transactions worth over ₹28,000 crore and 19 banks participating in its pilot runs. While the world debates whether central banks should issue digital cash, India is testing what makes it worth issuing: programmability.

The exploration map is already colourful. Gujarat supports self-help group women, and like Puducherry and Chandigarh, it credits the PM-Garib Kalyan Anna Yojana (PM-GKAY) food subsidy in e-rupees, redeemable only at fair price shops, as part of a trial run. Maharashtra's Project On Climate Resilience Agriculture uses the digital currency to disburse drip-irrigation funds to

farmers. The scope is vast. Andhra Pradesh provides a free LPG cylinder subsidy and Tamil Nadu offers skill vouchers, Telangana supports women journalists and Haryana provides e-scooters for construction workers. Madhya Pradesh is shifting from paper welfare coupons to the e-rupee, while Karnataka is using it as a payment leg in peer-to-peer energy trading. PM-Vidyalaxmi is moving to a digital rupee platform.

Candour first, since one number is humbling. Digital rupees in circulation fell 24% to ₹77.7 crore in 2025-26. As a substitute for cash, the e-rupee has yet to find its moment. As a tool of the state, it has. A subsidy is not cash a citizen can choose to hold, but a promise the exchequer wants honoured. Programmable money is an encoded version of that promise.

Nowhere is that clearer than in Uttarakhand, which RBI has called the pioneer among states in using programmability. Its farms are small: about 900,000 holdings, three-fourths of them marginal, with a typical plot size of 0.80 hectare. A subsidy that arrives late or strays can cost a season's harvest; last October, pending Mission Apple aid and ultra-high-density orchard assistance had to be released on priority. A November 2024 order now requires agricul-

ture and allied departments to pay digitally when farmers apply for the state's Kiwi Neeti, Mission Apple, Millet Mission and Aroma Neeti. Live pilots, run with Union Bank of India and Punjab National Bank and linked via API to an Apuni Sarkar portal, cover Uttarakhand's NABARD-funded cluster polyhouse scheme.

Take the unit: one polyhouse. The scheme plans 14,777 units on over 1.2 million square metres for ₹304.4 crore, or about ₹2.0 lakh per 100 sq. m. The subsidy is 80%, about ₹1.60 lakh; the farmer contributes ₹40,000. Subsidy funds move in three tranches of about ₹70,000, ₹70,000 and ₹60,000. Each tranche lands in the farmer's locked digital wallet, goes via a QR code to a registered vendor and is unlocked only after a horticulture mobile team files a joint inspection report with geo-tagged photographs and the district horticulture officer approves. Traditional direct benefit transfer (DBT) audits follow subsidy disbursement. Here, a subsidy cannot be disbursed until the

work is verified. No bank account is needed, only a digital wallet on the smartphone.

Now, let us look at the funnel. The team processed 2,694 applications, covering 228,900 sq. m for 2,578 beneficiaries. The team released ₹3.21 crore across the first and second voucher tranches. The department

fully constructed 323 polyhouses, covering 23,100 sq. m of high-tech greenhouse area.

Dehradun leads the state with 72 polyhouses installed (₹68.4 lakh in vouchers), followed by Chamoli (46 units, ₹27.2 lakh), Almora (41 units, ₹38.9 lakh), Pauri (36 units, ₹20.6 lakh) and Rudrapur (29 units, ₹67.2 lakh). This means just 12% of applications have become finished units and

the ₹3.2 crore released is barely 1% of the scheme's ₹304.4 crore outlay. Dehradun alone accounts for 22% of completed units.

The arithmetic should worry us. Three tranches across 14,777 units mean 44,331 rounds of field verification and approval. Every delay leaves a vendor's working capital

idle, so vendors price that into polyhouses. Accountability must not become a queue.

So what should be done? *First*, fix the front of the funnel: set up wallet-opening camps via common service centres and gram panchayats, and publish district conversion rates weekly. *Second*, build verification capacity: use geo-tagged imagery and satellite checks for routine cases, field teams for sampled and high-risk sites, and a fixed seven-day turnaround with automatic escalation. *Third*, widen the hill vendor base and use the offline mode that RBI is piloting. *Fourth*, replicate the locked-tranche template across apple, kiwi, millet and trout schemes, and route the Centre's share of centrally sponsored schemes through the Public Financial Management System, as Chandigarh and Puducherry do for PM-GKAY. *Fifth*, move to credit: RBI is piloting programmable loans for tenant farmers, opening the formal system to cultivators without title or collateral. *Finally*, publish a scoreboard and commission an independent evaluation.

India is learning to deploy digital money to keep its promises more effectively. Uttarakhand is where the lesson meets the terrace farm. Can the state give the digital rupee pace and purpose? The next season will tell. *These are the authors' personal views.*

INTERNATIONAL EDITORIALS



The FT View



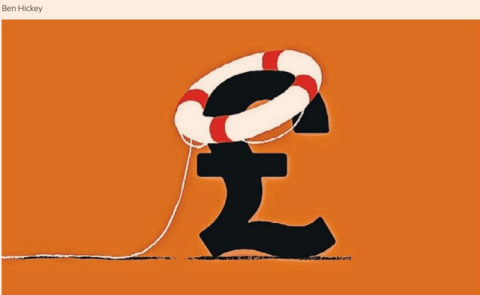
FINANCIAL TIMES

"Without fear and without favour"

ft.com/opinion

Opinion UK politics

Britain's IMF bailout has lessons for us 50 years on



It was a mind-blowing moment in Britain's postwar financial history. On September 28 1976, Denis Healey, the chancellor of the exchequer, was at Heathrow on his way to the Commonwealth finance ministers' meeting in Hong Kong and then to the IMF annual meeting in Manila. Sterling was in freefall and the country's foreign currency reserves were draining away. Healey realised that if he took the plane he would be out of contact with London for 17 hours. He turned back from the airport and initiated an approach to the IMF for a \$3.9bn loan – at the time the largest sum ever requested from the fund.

The management of the British economy was, in effect, outsourced to a posse of IMF bureaucrats who signed into Brown's Hotel in Mayfair under false names. They extracted a heavy

This time, there is no deus ex machina to match North Sea oil unless you believe in AI miracles

price in public spending cuts, which caused bitter arguments in cabinet. But Prime Minister James Callaghan and his dissident ministers acquiesced to IMF conditions because the alternatives – a siege economy with import controls or formal default on public debt – were unthinkable.

Back then I was the financial editor of The Economist. I vividly recall the profound sense of shock, post-imperial impotence and national humiliation. Newspaper headlines pronounced Britain "bust".

Today, with another Healey – John – at the Treasury, the 50th anniversary has a certain resonance. Yes, in 1976 the country also experienced its hottest, driest summer in living memory while the oil price was spiralling. But the incoming Labour government's economic inheritance from the Tories in 1974 was also dismal.

Since the Conservative chancellor Anthony Barber's 1972 "dash for growth" Budget, the public sector borrowing requirement on which markets were fixated had soared, money and credit were out of control and Britain was in the grip of a wage-price spiral and a housing bubble.

Particularly damaging for British industry was the interaction of high inflation with the tax system. Corporation tax was levied on historic cost

profits, which made no allowance for the soaring replacement cost of stocks, plant and machinery. So an overtaxed corporate sector was running out of cash.

In his March 1976 Budget, by which time inflation was running at over 21 per cent, Healey made matters worse by increasing the corporation tax rate from 50 to 52 per cent, raising income tax rates and, notoriously, introducing a top marginal rate of 98 per cent on investment income.

This was against the background of the worst stock market collapse since the war, with the FT 30 index falling 73.1 per cent from May 1972 to January 1975. House prices were plunging; union militancy was rampant; there was a seizure in the banking system; and people were beginning to question the durability of capitalism.

After the October 1974 collapse and state rescue of Britain's leading machine tool manufacturer Alfred Herbert, Healey (to his great credit) got the message. In a mini-Budget the following month he introduced a stock appreciation tax break along with other measures to relieve industry's cash squeeze.

Healey was addressing the greatest loss of confidence in the UK since the 1956 Suez debacle – a monumental liquidity crisis. Yet it was not a genuine crisis of solvency; 1976 was the year that North Sea oil revenues began to flow. And as Healey revealed in his autobiography, the Treasury was feeding the markets and the IMF with hopelessly over-optimistic numbers for the public sector borrowing requirement. In the event, the IMF loan was never drawn in full and was repaid early.

The Labour government elected in 2024 inherited similarly flawed public finances from chaotic Tory administrations. Once again the bond market is ultra-suspicious. And while industry is far from bust, everyone agrees that the UK has problems with growth and youth unemployment, exacerbated by government measures such as increases in employers' national insurance contributions.

National solvency is a far greater problem than in 1976. The debt-to-GDP ratio then was just under 50 per cent while today it is approaching 100 per cent. An ageing population imposes an ever-increasing welfare burden while the government urgently needs to increase defence spending.

And this time around, there is no deus ex machina to match North Sea oil unless you believe in AI miracles. So today's Healey faces tough choices in pursuit of growth and stable public finances. He will be hard-pressed in his Budget on October 28 to lift the nation's spirits.

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The EU needs a clearer strategy for partners like Canada

Bloc should define what it can offer to prosperous fellow democracies

There was one message the leaders of Canada and the European Commission were keen to hammer home in their back-to-back speeches earlier this month: they are not going to take the dismantling of the rules-based international order lying down. In Strasbourg, Mark Carney and Ursula von der Leyen vowed to create a deeper alliance to make their economies more resilient and their sovereignty more effective. It was enough to rile up Donald Trump – but what it all means has yet to be decided.

In October, an EU-Canada summit is set to put policy flesh on the rhetorical bones. The two sides should set their ambitions high: they complement each other in so many areas that there are big benefits to be reaped. Energy resources

and critical raw materials are in great demand in Europe and in ample supply in Canada. The large EU market offers much-needed diversification for a country badly buffeted by its neighbour's erratic and domineering trade policy. Both sides have great capacities in technological development that they want to make less dependent on the US or China. They share geopolitical interests in the Arctic, and could collaborate more in defence industrial policy. Progress on any of these would make for a worthwhile summit.

Still, the potential should not be overhyped. Von der Leyen misjudged by inviting Canada "to be the first associate member of the EU". No such thing exists, and the mention unwisely took capitals by surprise (Berlin had even been promoting an entirely different proposal with the same label as a way to gradually absorb Ukraine into the bloc). More importantly, it suggests a much deeper degree of integration than Canada is contemplating.

Any notion of EU membership inevitably comes with pooling of sovereignty to benefit from strictly aligned policies. Canada is not interested in the former and cannot go very far on the latter – joining the EU's single market, for example – without raising trade barriers with the US that would be so costly they would make Brexit look like a walk in the park.

A more modest but more realistic partnership would be enough. Beyond the substance of any collaborations that might be agreed, it would show success for Carney's "middle powers" agenda. It would also undo some of the damage sustained to the EU's credibility from its members' failure to fully ratify a decade-old EU-Canada trade agreement.

At the same time, the EU must see its evolving relations with Canada in the context of what it can offer to a broader range of countries, such as the UK, Norway, Switzerland and Turkey, where membership is not on the horizon but where closer co-operation is

Both sides have great capacities in technological development that they want to make less dependent on the US or China

imperative. The EU's approach instead seems to be ad hoc bilateralism with each of them. This risks missing the opportunity for more deliberate strategic leadership.

If the EU wants to shape the changing economic world order, it should clarify the collaborative benefits it is willing to offer – from more ambitious access to the single market to more modest inclusion in its emerging "made in Europe" policy for preferential subsidies and public procurement. It should clarify, too, what reciprocal, legally binding commitments it expects in return.

None of this, moreover, should overshadow the crucial task of bringing in those countries that do want to become members. That means Ukraine above all, as well as nations such as Montenegro that are doing all they can to meet the EU's strict accession criteria. This is harder than finding common ground with partners such as Canada – but also a greater test for the EU's strategic relevance.

Letters

Dire warnings around SEC reporting rule change are overdone

The Business Insight column on the Securities and Exchange Commission proposal to provide companies the option to report semiannually is chequered with fallacies, but the one found in its headline in the online version – "A vital tenet of US equity markets is under threat" – may prevail as the most inflated (September 2). In response to the claim that the proposal poses "risks to 'comparability', a core tenet of financial markets", international evidence paints a different picture.

Look no further than the London market. The UK required semi-annual reporting until 2007, switched to quarterly, then returned to

semi-annual just seven years later. The EU followed the same arc: it introduced a quarterly requirement in 2004 and reversed course in 2013. In both jurisdictions, companies may and do still choose to report quarterly.

As one commenter observed, responding to the SEC's proposal, "in both jurisdictions, many public companies continue to report quarterly on a voluntary basis, exactly what market forces would predict. Investors who want quarterly reports from UK and EU companies can get them, because companies understand that voluntarily providing information investors value serves their own interests."

Second, here in the US, many foreign companies listed on US exchanges report semiannually while domestic companies report quarterly. The current lack of comparability between foreign companies and domestic companies in the same industries has not yielded the dire effects the piece predicts. Investors aren't perplexed, even as the companies report side by side.

As with any rulemaking, SEC staff are reviewing all comments, and the commission will weigh them in deciding how to proceed.

However the commission comes out, it is imperative that the government tailor rules to fit the needs of today's

markets and give companies the freedom to make decisions, with market forces directing capital to those that utilise it best.

The greatest threat to our markets is not a company choosing to report every six months instead of three – it is the 40 per cent decline over the past 30 years in the number of public companies for investors to own. This SEC is making strides to reverse that troubling trend. If critics want to defend the vitality of our markets, they should support that effort rather than vilify it.

Paul S Atkins
Chairman, US Securities and Exchange Commission, Washington, DC, US

Miliband's Israel speech: the Orthodox community view

Contrary to the impression that may have been given by Robert Shrimmsley's comment on the response of British Jewry to foreign secretary Ed Miliband's Israel speech ("Israel's hapless British defenders", Opinion, September 11), many in the Orthodox community share, and have expressed deep concern at the allegations of settler violence in the West Bank and believe strongly that allegations of criminal and violent behaviour should be investigated, with appropriate action taken to ensure the protection of Palestinian civilians.

It is legitimate, and indeed helpful, for the British government to hold Israel to high ethical standards (although neither more nor less than the standards to which it holds any other country).

But it is unhelpful to conflate the defence of individuals' rights with the political judgment regarding the right of individual Jews to live in any part of their homeland, a right that is as much a part of their identity as the equivalent rights are part of the identity of many Palestinians.

Putting sanctions on violent settlers protects the rights of their victims and that is a valid action of the British government; placing legal sanctions on peaceful inhabitants of disputed territory is not.

That dispute is a political matter that should be settled locally with mutual respect between all inhabitants of the region, and with all individuals' rights being respected by all parties.

Respect for human rights everywhere is a proper matter for international concern and constructive rebuke between states; but interference in matters political is likely to be counter-productive and to devalue the legitimate ethical rebuke. **Donald Franklin, Rabbi Michael Pollak, Elkan Adler, Brian Berenblut** Trustees, Jewish Ethics Project, London NW11, UK

Seafarers share little of the shipowners' good fortune

The article by Alice Hancock and Malcolm Moore "Oil tanker costs hit record \$1.2mn a day as Iran war disrupts shipping" (Report, FT.com, September 23) highlights the good fortune currently being enjoyed by tanker owners, but it makes no mention of the seafarers without whom this good fortune would not have been possible.

Many of these seafarers are victims of the conflicts being waged in the Middle East and the Black Sea.

For 2026 has been the most dangerous year for civilian shipping since the second world war. Year to



Jewish settlers look on as homes in the West Bank are bulldozed in 2015

date, 450 vessels have been attacked and almost 100 seafarers killed. At the current rate, around 1 per cent of the global civilian fleet will have been attacked by the end of the year.

Discussions about freight rates, insurance costs and tanker earnings should also recognise the men and women whose work, often in increasingly dangerous conditions, keeps world trade moving.

JB Rae-Smith
Immediate Past President
UK Chamber of Shipping;
Director, John Swire & Sons,
London SW1, UK

California grafting

Janan Ganesh ("Leadership is not the problem in the west", Opinion, September 24) is correct that voters don't feel like voting in necessary policies.

My wife and I are very liberal voters in California. Time after time, in our state, we have voted for policies for necessary dams, canals, bullet trains, homeless solutions, education, etc.

And time and time again, the funds lay around not being used, instead siphoned off into the pockets of the ultra-wealthy or of the politicians.

My wife and I stopped voting for such projects because of the way state governments mispend, steal, sit-on, and do nothing with the projects we voted on.

Of course there are projects we should be approving. But why should we? It would be better to let the whole nation crash than to continue voting for projects that end up in graft.

Donald Trump is but a symptom of this disease.

Let it crash.
Andy and Barbara Serrano
Los Angeles, CA, US

Switzerland's wealth tax is nice earner for the cantons

As a citizen of Switzerland, which has the reputation of being a tax haven, I always have to smile when I read the often emotional discussions about how and why the wealthy should be taxed ("Nobel Prize economists back California billionaire tax to 'rein in' state's ultra-wealthy", Report, September 21).

In Switzerland, it is customary that the 26 cantons – but not the federal government – charge their taxpayers a wealth tax ("Vermögenssteuer"). This has been the case since the 18th century when the first cantons introduced this type of tax. So this is nothing new for us.

As a taxpayer living in Switzerland, you get an exemption for up to SFr60,000 (\$72,000) as a single person, or SFr160,000 as a married couple, depending in which of the 26 cantons you live. Once you exceed these net asset value levels, you will have to pay an annual wealth tax on the entire amount. It is not much for the individual taxpayer, but it adds up to quite a nice amount for the 26 cantons. On an annual basis, the 26 Swiss cantons generate roughly some SFr5.5bn with the wealth tax. Year after year. Increasing steadily.

The wealth tax rates are designed progressively and vary from canton to canton but are normally levied at between 0.02 per cent and 1 per cent. As an example, if you live in the canton of Zug, you will pay about SFr570 per year on net assets of SFr1mn. In the canton of Zurich, a canton with higher tax rates compared with most other cantons, you will pay approx SFr744 per year on net assets of SFr1mn.

The taxable assets include bank accounts, the fair market value of your house or condominium (minus mortgages and other debts), cryptocurrencies, shares, bonds, investment trusts, cars, jewellery, expensive furniture or antiques and precious metals, and other items of specific values such as valuable paintings or other collectibles.

All of these items you will have to declare as part of your annual tax declaration.

About 45 per cent of Swiss taxpayers pay taxes on their net assets ("wealth"), as defined. Nobody complains about this annually recurring tax, as the additional wealth tax burden, compared with the general income tax charge, is minimal.

And, of course, the Swiss taxpayers who do not exceed the necessary threshold level of taxable assets, do not pay any wealth taxes at all.

Hanspeter Jenni
Hombrechtikon, Switzerland

One hospital's attempts to harness the benefits of AI

Re Sarah Neville's balanced overview of AI in medicine ("Medical AI has a proof problem", The Big Read, September 18), there are undoubtedly many benefits to AI that could enhance patient care safety and experience. Perhaps the most crucial point of interaction is that between clinician and patient. Here, AI should be used with caution and perhaps be deployed to focus on "humanising" the healthcare experience.

In my organisation, we use an ambient system to generate clinic letters for primary care doctors and patients. The system aims to boost efficiency and improve patient interactions by reducing administrative burdens. However, I and many colleagues remain unconvinced.

A key aspect of any privileged human connection is the choice of words used and the tone of voice. Our letters also have a specific tone and voice, which AI-generated letters strip away. I struggle to recognise my voice in the output, which weakens my connection with patients and colleagues. For AI to be truly useful in this context, it would need to learn my written tone, which I'm told it can't do yet.

Dr Asif Ali
Consultant Physician, Milton Keynes University Hospital, Milton Keynes, UK

Oh for a Pevsner put-down of Trump's triumphal arch

Yet more on President Donald Trump and his astonishing bling-and-weapon fest in Washington calls to mind two historical footnotes ("President says 250ft arch will be 'military complex' with drones", Report, September 21).

First, Oxford English Dictionary's definition of "trumpetry", which in the noun form is given as "worthless finery; rubbish; nonsense" while the adjective is "showy but worthless, delusive, shallow". The word, we read, has roots in Middle English from Old French, *tromper*, to deceive.

The second footnote is a BBC broadcast by Nikolaus Pevsner after a visit to Washington in 1947, called "Washington and 20th century Monumentality". In it, the German-British architectural historian describes the US capital as "this place of vistas so wide and vast that one can hardly see the respective pendant buildings together. Anyway they are nearly all in the Neo-Imperialist-Nazi-Russian-Bank of England style with vast columns and never less than 500 feet long. One is impressed – but not favourably".

Judith Martin
Winchester, Hampshire, UK

Opinion

A message for the chancellor: the time is ripe for tax reform



Statistics have rarely been more exciting. This is particularly true of UK statistics, normally boringly sound. That is no longer true. On September 17, the Office for National Statistics rewrote the post-financial-crisis history of UK productivity. But, while an extraordinary event, this is unlikely to make the challenges confronting the chancellor of the exchequer easier.

As Clodhna Taylor, head of productivity statistics at the ONS, writes: "Our previous estimates suggested UK labour productivity per hour grew at an average annual rate of 2.1 per cent before 2008 and 0.7 per cent thereafter. Today's improved estimates indicate that productivity grew a little slower before 2008, at 2.0 per cent, while it

grew at an average of 1.3 per cent from 2009 to 2019." As the Resolution Foundation noted, this took the growth of UK output per hour "from second worst in the G7 over this period to second best". Hallelujah!

Or maybe not. The explanation for this upward revision is a downward revision of the growth in hours worked, not an upward revision in output. The slowdown in the latter is largely unaffected. The Resolution Foundation states the "revisions do not... alter the stagnation in incomes and wages that has held back families' living standards". Nor, it adds, do they change the UK's output per worker or GDP per head relative to its peers. In sum, the productivity puzzle has just been transformed into an hours-of-work puzzle.

This need not change the Office for Budget Responsibility's forecasts. Yes, raising hours worked is now a larger potential source of higher output. But without knowing why working hours grew less than thought and making relevant policy changes, it might not be realised. The labour market changes introduced by Labour – tighter regulation

and higher minimum wages – might even make the problem worse.

In sum, these revisions change nothing for the chancellor. As Valentina Romei and Alan Smith noted in "The FT's Budget dashboard" on September 24: "When John Healey unveils his Budget on October 28... he will be contending with higher borrowing costs, weaker growth expectations and Prime

The tragedy is that the government has a huge majority but has limited itself to minor changes

Minister Andy Burnham's stated desire to help voters with the cost of living." The "headroom" before he breaches his fiscal rules has shrunk and the short-term risks, particularly on the costs of borrowing, are large and uncontrollable. If Healey wants to understand what can happen if he loses the confidence of the markets, he needs to read today's sobering reminder from John Plender of

what happened 50 years ago, when the UK had to do a deal with the IMF. Arguably, that painful humiliation finished Labour for two decades.

The chancellor faces two challenges in preparing his Budget – the urgent and the important.

The urgent one is to cut off the "bond-yield-tail-risk". To do this, he needs to create a fiscal path that credibly reduces the ratio of net public debt to GDP, so recreating some of the room the country lost over two decades of crisis. This will mean a substantial fiscal tightening. The fiscal rules are not enough. Healey must take account of the need to spend more on defence. Since he is in a Labour government that will not slash spending, this means higher taxes. The UK is not in truth a high-tax country, at least by the standards of its European peers. Labour must now dare to recognise that reality.

The important challenge is to improve the efficiency of the fiscal system. This cannot be done overnight. But if the chancellor is bound to raise taxes, he needs to do so in the least damaging way possible. Good fiscal reform needs an intellectual framework. The best was

put forward by the Mirrlees commission, which published its report in 2011. The core of its recommendations is "for a progressive, neutral tax system". The most important word is "system": do not look at a single tax on its own but relative to the rest. The time now is ripe for such reform.

The tragedy is that the country has a government with a huge majority that has limited itself to minor changes. Sir Keir Starmer ruled out raising income taxes or VAT, the most effective way to solve large fiscal problems. This pledge remains a halter around the neck of his successor. Andy Burnham, the prime minister, should dare to say that the situation is not what his predecessor had hoped and so taxes must now be substantially raised.

This may be politically impossible and even constitutionally improper. But it is essential to understand that pressure from higher interest rates might destabilise everything. Fiscal credibility is not a luxury. A government that does not deliver it is walking naked.

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The real lesson from the Man City affair



If Manchester City broke the rules, it should be punished. The most successful English club of the last decade, owned by Abu Dhabi's Sheikh Mansour bin Zayed al-Nahyan, has been found guilty of 114 of the 115 charges that the Premier League brought against it.

The charges stem chiefly from the league's attempts to stop rich owners from subsidising their teams. Clubs are only supposed to spend their own football-derived revenues on players. City appears to have subverted the rules by paying some staff off the books and allegedly disguising Emirati gifts as sponsorship revenues.

City has maintained its innocence throughout and is expected to appeal. If it did cheat, it should be stripped of trophies, pay hundreds of millions of pounds in compensation to competitors and possibly be relegated.

But once that's done, the Premier League ought to scrap these misguided rules. Owners should be free to spend their own money on football. Their funding has made the Premier League better and more competitive. English football has a different problem: brutal regimes and people owning clubs.

The English game has been uniquely successful at attracting foreign buyers. Foreigners own the vast majority of Premier League clubs. Some – notably Sheikh Mansour and the Russian oligarch Roman Abramovich, who owned Chelsea until 2022 – put their own money into football, especially in

Football can thrive without foreign states or their rulers or proxies owning clubs

the era before restrictions tightened.

Coupled with the boom in TV rights and sponsorship since the 1990s, owners' funding has made the Premier League the world's richest and best football league. It's a domain of English excellence that draws tourists, supports about 104,500 jobs, boosts British sport power, has helped improve England's national team and makes life more fun.

Chelsea and City only began winning after Abramovich and Sheikh Mansour splashed cash. Well-funded upstarts took on the game's aristocrats – Manchester United, Liverpool and Arsenal, which have won the most English titles.

If the league's financial rules had more bite, they would be damaging. Had they succeeded in limiting Abu Dhabi's spending, City couldn't have become competitive, and the clubs with superior revenues – United, Liverpool and Arsenal – would have dominated. That would have suited these clubs' American owners, who are in football to make profits – that is, to take money out of the game. Football should prefer owners, like Mansour, who want to put money in.

The league says its spending curbs make clubs financially sustainable, but it worries too much about that. Football clubs are extraordinarily sustainable.

Almost every English professional club that existed in 1926 still exists today – unlike most companies of 1926.

English football should welcome donors, just as charities, universities and museums do. But it must tighten one rule: the Owners' and Directors' Test, previously called the Fit and Proper Person Test.

This rule is supposed to stop bad actors from buying English clubs. It doesn't. Mansour's United Arab Emirates and Saudi Arabia, whose sovereign wealth fund is the majority owner of Newcastle United, have dire human rights records, while Abramovich has close links to Vladimir Putin.

Almost all British institutions have welcomed brutal regimes, but there is a limit: the government blocked an Abu Dhabi-backed bid for the Telegraph newspaper. Football, an inessential leisure activity of great symbolic importance, can thrive without foreign states or their rulers or proxies owning clubs.

The Premier League lets undesirable owners buy clubs, seemingly for sportswashing purposes, and merely restricts their spending. It should screen for fit and proper owners, then encourage them to burn fortunes on funding brilliant football.

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Pay to play in age of corporate migration



Hollywood just got more concentrated. Last Monday, Paramount eliminated the last major hurdle to its \$111bn bid to buy Warner Bros, after playing the ultimate trump card: it threatened to leave the Golden State.

California attorney-general Rob Bonta, who led a coalition of 11 other state AGs opposing the deal, had declared the threats "blackmail". But in the end, the possibility of losing thousands of union jobs and millions in tax revenue was a bridge too far. Bonta signed off on the deal without the major divestments the AGs had fought for.

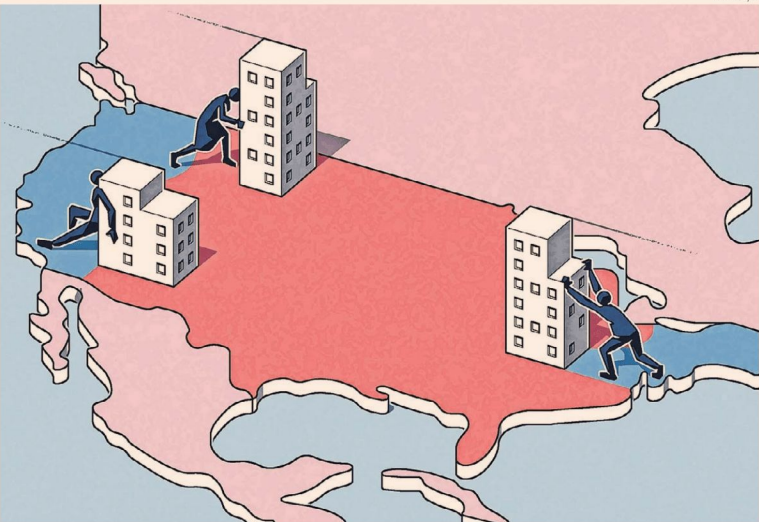
Paramount is not the only brand-name company threatening to leave its historic home if it doesn't get what it wants from state government. The Chicago Bears board voted in June to move the NFL team's stadium to Hammond, Indiana, a border town about 25 miles from downtown Chicago in a neighbouring red state that's offering bigger subsidies and tax breaks. Tesla's Elon Musk (who has extracted billions of dollars in federal and state government concessions over his career) didn't even have to threaten to leave Texas to get the tax

incentives he wanted to complete a new \$10.1bn solar cell factory in Houston. The local school district simply passed them unanimously in September without a public debate.

It is no secret that blue states like California, New York, Illinois and others have been losing business to red states willing to pay companies whatever they want to move. According to one study, state and local subsidy packages have doubled since 2008, with most of the companies in question moving to places like Texas, North Carolina, Florida, Tennessee and Arizona. The most cited reasons for moving, aside from the tax breaks themselves, are a "pro-business environment" and access to "growing and diverse talent pools", according to a 2026 report from CBRE, the commercial real estate services and investment firm, that examined corporate relocation since 2018.

That reflects the fact that Americans themselves have been moving away from more expensive coastal states, most of which are more liberal, for years now. Cost of living is a big reason for the mass post-Covid exodus west and south, but a more libertarian culture is a factor too. Americans love their freedom, and many feel they get more of it in places with lighter-touch regulation.

To that point: while politicians once speculated that blue-to-red state migrants would eventually turn politics purple (as has been the case in places like Georgia, where many Black Americans from the north-east have moved), many of the migrants leaving coastal



areas for red states are conservative themselves. A study by the Public Policy Institute of America found 39 per cent of state voters who left between 2020 and 2024 were Republicans, compared with 25 per cent of total state voters. Migration away from California is arguably solidifying partisan politics.

That in turn makes it more likely that the regulatory arbitrage will continue, as blue state voters call for higher taxes on corporations and the rich, while red states push harder for deregulatory, low-tax, pro-business policies. As one Miami real estate developer told me recently: "We love Mamdani – he sends us so much business," in the form of rich buyers migrating south. As blue and red states continue to diverge politically, writing different rules for things like AI,

Paramount is not the only company threatening to leave if it doesn't get what it wants from its home state

data centres, corporate governance, and zoning, corporate migration to red states may well increase.

But states' willingness to bargain to keep those companies may increase, too. Many large companies are, despite all the geopolitical challenges, still flush with cash, and predicting higher earnings in the future. Meanwhile, federal debt and deficit levels are rising (something the bond market has clearly taken note of) and states like California, Pennsylvania, New York, Maryland and Washington are under strain, too. Pandemic-era surpluses have been used up, and education, healthcare and infrastructure costs are increasing. Rising interest rates won't help either. Big states will need more cash, and soon.

That asymmetry gives companies more bargaining power. The Paramount case implies that states are willing not just to give companies subsidies and tax breaks to stay, but to potentially delay regulatory action. There are also examples of corporate migration threats shifting the law itself. When Texas and Nevada drew several companies away

from Delaware as a place for incorporation, Delaware loosened its own laws to try and stem the tide.

This race to the bottom is ultimately going to be a losing game because it won't change the fundamental economics of the expensive states (which are mainly about real estate and labour costs) and it could drain the public finances of red states promising the moon to various corporations. Research shows this can, in turn, erode the quality of public services that drew companies to a new location.

As corporate pressure grows, it behoves public officials to weigh threats carefully, to see if they really have teeth. Research looking at business incentives between 1990 and 2015 found that they tripled as a share of business "value added" during that time. But they changed the location, expansion or retention decision of 25 per cent or less of firms receiving them. Corporate migration may happen regardless of whether states pay up.

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For once, the Fed has put Main Street before Wall Street

Conventional wisdom says that interest rate cuts help Main Street and rate increases hurt them. Conventional wisdom is wrong. This month's Federal Reserve decision to raise short-term borrowing costs by 0.25 percentage points serves the best interests of US households struggling with ever-rising prices. It sends a decisive signal that the central bank will use the tools at its disposal to bring down the cost of living – the number one economic issue facing American families right now.

US households are suffering from the price of things, not the price of credit. A quarter-point increase in credit card rates does not matter much when it costs over \$200 a month to fill up their cars and over \$1,000 to feed their fami-

lies. With its September rate decision, the Fed is correcting for its past misjudgments. In 2022, it was too hesitant to raise rates, despite persistent inflation, and in 2024, it was too quick to lower them with inflation still above target. The result: inflation rose to 9 per cent in 2022 before rapid rate increases finally brought it down, only to start rising again when the Fed prematurely cut in 2024.

Those election-year rate cuts, however well intended, are instructive for those politicians who think the Fed should have cut this month. With the US at full employment and inflation falling, the Fed cut rates by a whopping half point in September 2024, with two more quarter-point reductions that year. Inflation started creeping up, with headline inflation rising from 2.4 per cent in September to 3 per cent by January 2025. During that same period, the yield on 10-year Treasury bonds rose from a low of 3.6 per cent to 4.6 per cent.

Many factors influence 10-year Treasury rates; investor expectations about inflation are a big one. The Fed's dovish

stance back then exacerbated investor worries about inflation. The same dynamic repeated itself in September 2025; when the Fed cut rates, 10-year yields rose.

Ten-year Treasury yields matter to consumers because they are tied directly to mortgage rates and filter through to other consumer credit such as auto loans. Predictably, as they rose in 2024, so did the rate on 30-year mortgages. Auto loan rates also rose slightly. Average credit card rates did go down, but only by about half a percentage point.

Because the financial system is the mechanism by which the Fed transmits interest rate policy, those at the top of that system are the ones who benefit the most from rate cuts. Large financial

Republicans should celebrate the fact that the central bank has made living costs its top priority

institutions quickly see a decline in their borrowing costs, while the value of their assets rises. Lower borrowing costs trickle down much more slowly – if ever – to middle- and lower-income families. As we saw in 2024, some of their borrowing costs may rise. Because they do not own financial assets, they receive no benefit when lower rates drive up asset valuations. Meanwhile, the meagre yields they received on their bank deposits go down.

Fortunately, the new Fed chair, Kevin Warsh, seems open to reassessing the relationship between monetary policy and Main Street. This is long overdue. Witness what happened during the years following the 2008 financial crisis. The Fed kept rates at ultra-low levels for 14 years, on the traditional theory that this would help Main Street recover from that economic catastrophe. That worked out for the richest 1 per cent of households who fully recovered their wealth by 2011. It took the bottom 50 per cent until the mid-2020s to do the same.

Markets responded well to the Fed's recent increase; 10-year bond yields had been mostly rising since late 2024 but fell noticeably the day after the decision. To be sure, they are under pressure from multiple sources. Many of the drivers of inflation – some good (strong growth) and some bad (energy supply disruptions, tariffs, deficits) – are beyond the Fed's direct control. But incremental increases in borrowing costs can help address supply-demand imbalances. Stimulating demand with rate cuts would make them worse.

Instead of criticising the Fed, Republicans should celebrate the fact that it has made the living costs of Main Street America its top priority. Private equity and other financial elites whose businesses rely on high asset valuations and heavy borrowing will feel the brunt of rising rates. But for once, Main Street's interests have prevailed over Wall Street's never-ending demands for cheaper money.

The writer is a former chair of the US Federal Deposit Insurance Corporation

Opinion

In the land of billionaire barbarians

Paris has the Arc de Triomphe; New York, the Met. Silicon Valley has a shopping mall.

Arielle Pardes

A start-up founder I know who is based in New York recently visited Silicon Valley for the first time. He'd arranged to stay where the world's richest people make the world's most influential technology products. When he arrived, he was shocked to find a soul-crushing, car-choked suburban sprawl filled with office parks, auto dealerships and chain stores.

The part of Northern California we call Silicon Valley — a radius that includes the cities of San Jose, Mountain View, Cupertino, Menlo Park and Palo Alto — is home to four of the most powerful companies in the world. It has more combined wealth than most small countries, and at least 50 of its residents are billionaires. Yet by looking at it, you'd hardly know this place had any influence at all. Parts are pleasant, if provincial, with long avenues of low-slung ranch houses framed by eucalyptus trees. The rest is a placeless suburb, with aging infrastructure and cracks in the asphalt. Silicon Valley is one of the richest places on the planet, and it still has potholes in its streets. About a quarter of residents are struggling to survive there.

The tech elite have donated generously to scientific research and global health initiatives, but little goes to improving their own backyard. The lack of investment in the cities where our tech lords work and live reveals a stark reality about how this wealth benefits a select few at the expense of everyone else. As the industry expands its footprint nationwide with data centers, the rest of America would be wise not to let the same thing happen again.

Throughout history, the world's wealthiest and most powerful people erected monuments that redefined their cities and communities. French monarchs built the Arc de Triomphe. Industrial tycoons funded the New York Public Library. The Medicis filled Florence with art.

Silicon Valley, on the other hand, has about as much cultural capital as an airport. Its greatest cultural institution might be the two-million-square-foot Westfield Valley Fair shopping mall.

"If you were Napoleon Bonaparte, you built a building that was meant to last forever, as a monument to your fame and achievement," said Fred Turner, a professor at Stanford University who studies media, technology and American cultural history. "Silicon Valley's power is entirely different."

This power is entirely inward-facing. Wealth is hidden within modest-looking homes and walled-off corporate campuses. If you can't afford to live, every privilege exists. But for those on the outside, the residue of wealth is virtually invisible.

This sleight of hand is not an accident. The richest people in the tech industry have blocked policies that would raise taxes, increase wages or otherwise reduce their wealth to make life better for the people around them.

Before the region became synonymous with the tech industry, it was an expanse of cherry orchards and plum trees known to the locals as "Heart's Delight." Then, in the 1950s, engineering talent began to arrive, lured in by Stanford and encouraged

by Department of Defense contracts. Soon, those orchards gave way to office parks, and the companies producing silicon for computer chips and semiconductors gave the region its new nickname.

Those same companies also dumped toxic chemicals used in manufacturing onto the surrounding land. These chemicals seeped into the soil and groundwater and have been linked to severe birth defects. Santa Clara County, the southern part of Silicon Valley, has more Superfund sites — areas deemed by the Environmental Protection Agency as so contaminated they require years of cleanup — than anywhere else in the country. You could say that the tech industry has, from its inception, extracted value from the place where it exists while actively poisoning it.

Today's tech giants haven't contaminated the region so much as colonized it. The Valley has become organized, as Dr. Turner noted, like a series of feudal clusters: Google of Mountain View, Apple of Cupertino, Meta of Menlo Park, Nvidia of Santa Clara.

Each of these strongholds functions like a city in miniature, complete with cafes and dining halls, barbershops and dry cleaners, even health care clinics and day care centers. Apple's campus — a glittering circle wrapped in the world's largest panels of custom-made glass — includes a 100,000-square-foot wellness center with a

If these data centers are symbols, then they represent the growing bifurcation of wealth in America.

two-story yoga studio. Meta's 30 structures spread over 250 richly landscaped acres, which include a nine-acre rooftop park and its own main street with an arcade, barbershop and candy store. Much of this is free if you work there; the picture is less clear

for the lower-wage custodians, cafeteria workers and security officers who often don't work directly for the companies.

These luxurious domains leave most workers little reason to engage with the surrounding communities, and give the industry little reason to create anything for the public. Plenty of tech workers don't even live in Silicon Valley; their companies provide employees free buses that shuttle them home north to San Francisco.

Isn't this just capitalism? Companies aren't charities. Yet plenty of companies outside Silicon Valley do invest in their surrounding communities, to the benefit of everyone. In Bentonville, Ark., Walmart's founder and his family have spent considerable sums improving infrastructure, building museums, creating mountain bike trails and opening restaurants. In Midland, Mich., the Dow family (of Dow Chemical) financed extensive botanical gardens, miles of public parks and the Midland Center for the Arts. And nearby to Silicon Valley, in San Francisco, Salesforce's chief executive, Marc Benioff, helped fund the Presidio Tunnel Tops park, a beloved green space.

This type of philanthropy used to be much more common. The industrial tycoons of the Gilded Age bankrolled cultural institutions like the Met and Carnegie Hall as a way to soften their public image. The historian Margaret



ÁLVARO BERNES

O'Mara referred to it as "reputation laundering." By comparison, Dr. O'Mara told me, many of today's tech tycoons are more capricious. Witness the way Mark Zuckerberg and his wife founded a free-tuition school through their foundation for low-income children in one of the poorest areas of Silicon Valley in 2016, only to abruptly close the school this year.

The cities of Silicon Valley do collect tax revenue from the companies headquartered there. Yet that revenue is wildly out of proportion with the actual volume of wealth in the region, which remains locked in untaxed gains. Some of the wealthiest people in Silicon Valley have become experts in avoiding certain tax liabilities.

In 2024 — when Silicon Valley's public companies were valued at a combined \$14.3 trillion — 70 percent of Silicon Valley residents said that their quality of life had worsened in the past five years, according to a poll conducted by Joint Venture Silicon Valley. Today, there is some \$117 trillion in liquid wealth among local households, according to the latest Silicon Valley Index, an annual report on the region's

economic status. But researchers at San Jose State University, who publish the annual Silicon Valley Pain Index, found that 28 percent of local households "need outside assistance to survive in the region."

Americans may not be aware of the struggles in Santa Clara County. But many have seen what social media, internet search and e-commerce monoliths are doing to their families and their communities. Little wonder, then, that the tech industry's push to build data centers across America — a sort of techno Manifest Destiny — is not being well received. Seven in 10 Americans oppose the idea of having a data center built in their community, according to a recent Gallup poll. That's a level of resistance even greater than the opposition to building nuclear power plants.

"To some extent, these data centers are seen as a harbinger of technology that people don't really want in their lives," said Jeannette Estruth, an assistant professor of history at Santa Clara University, who is working on a book about social movements in Silicon Valley. She pointed to coalitions

that banded together in the 1980s to pass laws to regulate the handling, storage and disposal of chemicals in the electronics industry in response to the dumping of toxic waste. Now, she said, people can do the same with data centers.

If these data centers are symbols, then they represent the growing bifurcation of wealth in America, where a select few stand to get much, much richer, while the rest of us are stuck with the ugly byproducts. Perhaps tech corporations shouldn't be expected to treat the places where they build data centers as anything more than a utility closet. But as history has also amply shown, the people and politicians around them can compel them to, and should do so before it's too late.

If they don't, the future the tech industry builds will be a monument to their wealth — and to the rest of America's ruin.

ARIELLE PARDES is a former senior writer for *Wired* and *The Information* who has covered the tech industry for the last decade.

Hold my hand, warm my heart

Two of the things that count most in life are love and usefulness. Hand-holding offers both.

Roger Rosenblatt

The subject is the holding of hands. You take my hand; I take yours. What does it mean?

My wife, Ginny, and I hold hands when we walk outside. Passers-by smile approvingly, thinking that what they're observing is a gesture of love. It is. But it's also a demonstration of necessity. If one of us stumbles, there's always a hand to steady the other, like a listing ship righted.

Two of the things that count most in life are love and usefulness. Holding hands offers both. Take my hand. Keep me straight, protect me and warm my heart.

Holding the hand of another involves all the meanings of hands, which are multiple and various. Hands are essential to our being. Ever since God and Adam reached toward each other, a power, almost supernatural, has been ascribed to the touch of one hand by another.

In Scripture, the laying on of hands denotes healing. The word "hand" has been enlarged to mean help itself: lend a hand. Hands also represent work: all hands on deck. They are signs of approval: give her a hand. Or the basic gesture of surrender: hands up. The sealing of a deal? Put it there, pal. If

you need self-control, get a grip.

You pray with your hands. Use sign language with your hands. Some read the lines in your hands as predictive of your life. Approval is indicated by a show of hands. To celebrate, you give a high-five. Extend your hand toward a baby, and it will cling to a finger.

With small children hand-holding means protection, safety and comfort. The feeling of leading and being led. Those sweet caravans of pre-K little ones, walking to and from their schools, hand in hand.

When people are ill or in mourning, we hold their hands. Idle hands may be the Devil's workshop, but when your hands are holding other hands, it often means you have put everything else down or aside for someone else.

The significance of hand-holding rests on how fundamental our hands are. What would romance do without hand-holding? The Beatles scored a massive hit with "I Want to Hold Your Hand." The first gesture of love of a boy or girl is usually to reach for the other's hand.

My son-in-law, Harris Solomon, an orthopedic hand surgeon, has been in practice for decades and remains impressed with how prominent hands are "in our entire interaction with the world." He marvels at the relationship of the brain with the hand: "The back-and-forth communication. Five fingers working together. Two hands working



EBERH FRANKLIN

together. The required computing power is staggering."

So powerful is the idea of the hand that it is often given a life of its own, independent of the mind. A 1946 horror film starring Robert Alda was "The Beast With Five Fingers," about a disembodied hand that commits murders. The idea of that dangerous inde-

pendence occurs in Christianity, to express one's helplessness to evil acts and influences: my mind cannot believe what my hand has done.

On the whole, though, we think of our hands as instruments of good. They protect us if we fall forward. They help others. A doctor's hands save lives. Of the profound influence of

motherhood, it is said that the hand that rocks the cradle rules the world.

Whatever the applications, the intimacy is profound. In that perfect movie "Moonstruck," Nicolas Cage's character, Ronny, makes a gesture of both finding love and himself by extending his hand to Cher's Loretta. The hand is artificial, made of wood, because his real one got cut off in an act of self-destruction born of misdirected love. Now, with Loretta, he has found the woman he was meant for. The false hand reaches for the real thing, and is brought to life by it.

In old age, holding hands is a guide to the past. Ginny and I held hands in high school. We hold hands today. They are not the same hands. Today's hands are discolored, with roads of wrinkles and blue highways of veins. They have been through the mill and through the wars. That we hold hands still is partly an act of pride — and defiance. We can last. Our hands prove it. In old age one looks for something reliable to hold on to.

Here we are, a shaky and weakened Hansel and Gretel, lost in the woods, wary of witches. Alone, afraid, yet less afraid for the touch of each other.

Around us, the storms of the world. Within us, images of family and friends. Before us, life. Take my hand.

ROGER ROSENBLATT is the author of "More Rules for Aging."

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Artificial intelligence has made me a better physician

Rachael Bedard
Contributing Writer

I have a confession: A.I. is making me a better doctor. And I worry that it's making doctors-in-training worse.

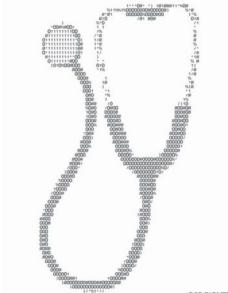
Amid our recent doom cycle about whether A.I. will lead to extreme societal harms, a parallel anxiety has taken hold in medicine about whether A.I. will one day replace physicians. In the context of that panic, I feel a little sheepish admitting that I already use the technology in my practice all the time — especially since I harbor anxieties about what its availability means for my students and residents, and therefore for the profession at large.

This summer, I used an A.I. tool — a platform called OpenEvidence, accessible only to health care providers — to help me choose antibiotics for one patient and to interpret unusual bloodwork for another. A.I. reminded me to consider migraines when a woman presented with dizziness. I chatted with the large language model about treatments for an older man with lung cancer. I have also consulted it about a rash on my father's back, my son's fever, a friend's arm pain and my own difficulty sleeping.

I practice primary care, where every malady is my business. Almost every month, I'm confronted with a complaint or syndrome that I don't recognize. I'm confident in my mastery over what doctors do — history-taking, reasoning, communicating. I'm less confident about my continued mastery of an ever-evolving universe of facts. Now, the chatbot in my pocket reassures me that I will always know enough, or have access to the cloud-based intelligence that generally does.

All of my students and residents also use OpenEvidence, however, and I worry about the consequences of introducing such a powerful decision aid so early in their careers. Not only have they memorized less than I did, but they can seem almost passive in their relationship to their machines.

It's impractical and counterproductive to train physicians in 2026 without exposure to A.I. Doctoring — as opposed to writing, my other work — is not a creative act that needs to be protected from technological annexation. It's a service that ought to embrace any resource that improves patient care.



BOB FARMER

Training doctors in the A.I. age, then, means training them to think critically with a machine in the loop, for a speculative future of medicine that we can only glimpse.

I started medical school 20 years ago. Every day since, I have looked something up, skimmed a journal article or talked through a case with a colleague — medicine is a phone-a-friend profession. As a student, I walked around the hospital with "Pocket Medicine," a standard-issue guide, tucked into my white coat pocket, and I consulted it all day long. I had to understand exactly what I was looking for when I flipped through its pages, and it could not tell me what to do with whatever knowledge I found there.

I haven't carried "Pocket Medicine" for years. Instead, I am never without my phone. For years, I primarily took my questions to the widely used website UpToDate.com, an evidence-based medical encyclopedia. But now, several times a day, I use OpenEvidence.

OpenEvidence is trained exclusively on peer-reviewed evidence and guidelines, and includes citations for all its claims. Not every insight found there is useful or even accurate, because much

of the medical literature it refers to falls short on both those counts. To use the app well, you must stay skeptical as you scroll. It does, however, allow me to trace a statement to a source so I can evaluate it for myself. OpenEvidence reports that over half of American doctors regularly use the app, and it recently announced a plan to expand free access to doctors in developing nations.

OpenEvidence and I can have an iterative conversation grounded in a case's peculiarities, a difference in kind from when I used to look up general information and try to apply it to an individual situation. The app lets me input my patient's labs, or upload an imaging report photo, and then offers suggestions about what it sees. Not infrequently, it suggests something I did not consider.

I'm surprised by how much I learn from, and enjoy, these interactions. More important, my patient care has improved as conversations with the agent push my thinking beyond its usual limits.

For the residents I supervise, however, the app's speed and anticipatory helpfulness are a hindrance as much as an enhancement. When I skim a chatbot's response to a question about back pain, I'm intuitively testing its suggestions against my hard-won mental model for how to approach back pain.

Could I have developed that if I'd had a robot leading my thinking all along? I asked Adam Rodman, a physician and A.I. researcher at Harvard Medical School, how to think about these risks. He said he shared my concern that trainees aren't benefiting from "productive struggles" as much as their predecessors. "In experienced hands, decision support might cause a little de-skilling, but a little de-skilling probably doesn't matter much to you," Dr. Rodman told me. "But if you do that to somebody who has much less skill, the cognitive offloading can cause never-skilling."

I don't think it's critical that my residents memorize every diagnostic protocol, just as it's no longer critical that I recall my friends' phone numbers. But I do want them to learn to hear problems the way a doctor is supposed to, as stories that contain clues that set off a cascade of cognitive associations. And I want them to develop the cardinal instincts that amount to good judgment in medicine: the ability to distinguish sick from not sick and to prioritize competing patient concerns, as well as the tact to effectively seek information beyond what a patient voluntarily reveals.

A.I. is only the latest tool to provoke a reckoning around which skills are truly essential to doctoring. As a student, I struggled valiantly to identify heart murmurs in my patients, even though I had access to imaging techniques that made my stethoscope somewhat redundant. Similarly, students today need opportunities to build cognitive muscles through study, even if they will seldom rely on their own memories over their machines.

Dr. Rodman shared ideas for how to help learners experience worthwhile friction despite the availability of A.I. — proposals like A.I.-free clinical reasoning sessions and A.I. literacy training. We don't yet know, however, what caring for patients will even look like once artificial intelligence is fully integrated into medicine, nor what its capabilities will be.

Current doctors-to-be may be the most adversely affected generation when it comes to A.I. They're training before we know enough about how to teach them well in this new paradigm. I want their patients to benefit, as I think mine are, from doctors supported by these tools. But I also want them to develop a talent for reasoning their way through complex problems full of distractions and ambiguities, and rich with emotional states.

The hardest parts of doctoring will stay hard, I think, even if some other tasks are made easier. Mastering those challenges will still be where the utility and the pleasure of medicine will be found. The profession has adapted to waves of paradigm-shifting technological change before, yet the privilege of taking care of people remains.

For experienced doctors, new tools are vital. For med students, they can hinder learning.

RACHAEL BEDARD is a geriatrician and a palliative care doctor.

Climate catastrophe is still on the table

David Wallace-Wells
Zeke Hausfather

Every September, at Climate Week in New York, there's a big scientific and diplomatic reckoning with the global state of play. This year, the mood was pretty confused.

To begin with, it was a brutal summer: wildfires tearing through neighborhoods and clouding cities with toxic smoke; heat waves killing tens of thousands across Europe; a glacial collapse and landslide in Nepal so huge it registered as a 5.2 magnitude earthquake, flattening thousands of homes and killing over 1,300 people. And now comes an absolutely staggering, off-the-charts "Godzilla" El Niño that is already a record for this time of year and forecast to become the strongest in modern history and push the planet into uncharted climate territory.

But compared to years past, when conferences like these sometimes commandeered the world's attention for a moment, the climate alarm this year is a bit less loud. Politicians have mostly moved on, in the United States and around the world. Over the past year, you might have read that the clean energy transition has pulled the planet back from the brink, and that scientists are growing less concerned about the truly alarming climate futures that once inspired a global political awakening. Global warming is real, that story goes, but it is turning out to be less frightening than we were told.

There is some truth here. The world has made real climate progress over the past decade, projected future warming has fallen quite a bit, and a worst-case emissions scenario known as "RCP8.5" — in which coal use would be roughly quintuple by 2100 — is being phased out as implausible.

But a new round of forecasts from the climate science community is pretty alarming. Scientists used to worry about the possibility of the earth warming by a global average of two degrees Celsius (3.6 degrees Fahrenheit). That is now almost a certainty on the path we are on today. Scarier futures loom at three degrees and four. Thanks to the rapid rollout of green energy, those futures appear a bit less likely.

But because we're still burning an awful lot of fossil fuel — and because the climate itself may have some surprises in store — harrowing temperature increases remain unnervingly possible. It's not just that by moving too slowly we've lost the opportunity to avoid disruptive climate change. The high-end warming sometimes described as a "worst-case scenario" is very much on the table, too. The world is busy with crises, and some policy leaders have tried to downplay or ignore climate change. But this is not the time for complacency.

Ten years ago, in Paris, the world's governments agreed to limit global warming to well below two degrees



THOMAS ALBUROF

Celsius of warming, which would protect at least some of the world's coral reefs, prevent a doubling of the global population living with extreme heat, avoid projected crop losses across much of the world and save low-lying island nations from disappearing. On current pathways, we are

virtually certain to exceed two degrees of warming by the end of the century — with about a 50 percent chance of doing so in the next 25 years.

And it could get hotter still. In fact, it probably will. At three degrees higher, the world's ice sheets would be committed to millenniums of retreat.

The share of species on land facing a high risk of extinction could double.

How likely is this future? According to conventional modeling of today's policies and pathways, the odds are about even by 2100 — and three in four by 2150. Those dates are a long way off, but this would mean packing millions of years of climate transformation into a single century.

There is also a voluminous scientific literature about an even more hair-

raising level of temperature rise — between four and five degrees Celsius of warming this century. This is the true climate doomsday stuff, with most effects growing exponentially worse and damages compounding, likely arriving faster than farms, cities, coastlines and ecosystems can properly adapt. Recent models tell us that current policies give us about a 25 percent shot at exceeding four degrees by 2150.

Those odds look a bit better than they used to. But we shouldn't overstate our scientific confidence about an experiment we get to run only once, in a climate system whose intricacies remain mysterious and in which all of us and all of our descendants are going to have to live.

Uncertainty is decidedly not our friend when it comes to climate change, though conventional climate forecasts tend to sound reassuringly precise. Hold today's climate policies constant, for instance, and our best models tell us to expect a long emissions plateau producing about 2.9 degrees of warming by 2100. But that is just a central estimate. Perhaps we'd get lucky, and warming would hit only 2.2 degrees, which would still be very harmful. Or perhaps we'd get unlucky, in which case it might hit 3.9 degrees, which would be truly catastrophic.

The U.N. is terrible, but we need it

KRISTOF, FROM PAGE 1 wanted to beat my head against the wall in frustration with U.N. bureaucracy. In 2009, when I was covering the Darfur genocide with George Clooney, the U.N. pulled our security escort, for fear of being associated with any criticism that Clooney might make of Sudan for committing genocide. When Bosnians, Rwandans and Yazidis were slaughtered, the United Nations dithered.

"The cost is measured in lives," said Nadia Murad, a Nobel Peace Prize winner whose Yazidi region in Iraq was surrounded by ISIS fighters in 2014 for nearly two weeks. "No one came to help us," she told me, and she ended up kidnapped by ISIS and was raped for months. Her mother and six brothers were murdered.

Yet if the United Nations is periodically paralyzed, it's also vital and sometimes a godsend.

"I have also seen U.N. staff remain in places after everyone else has left, doing work no one else is willing to do," Murad said. "That work is indispensable. That is precisely why the U.N. must do it better."

Critics can denounce United Nations workers as "fatally arrogant parasites," as President Javier Milei of Argentina put it a few days ago, but I've been held at gunpoint alongside courageous U.N. humanitarians in the Central African Republic who were trying to bring assistance to a desperate area after other aid workers had fled. I've seen frontline U.N. workers living out of cargo containers in Somalia, sleeping in tents in South Sudan, driving down perilous roads in Congo and standing up to gunmen in Yemen — risking their lives to save children from war, rape and disease.

One of the heroes of the 20th century was James P. Grant, who led UNICEF



ZHANG DIALI VIA ELU KLERN GALLERY, NEW YORK

and in 1982 engineered the child survival revolution. He and his team developed vaccines and better treatment of diarrhea to save 25 million lives in his lifetime, and countless millions since.

When have critics of the United

Nations done anything half so noble?

When have critics of the United Nations put their lives on the line for others, like the 136 U.N. employees who died in the line of duty last year? Or like the 73 U.N. staff members currently held prisoner by the Houthis in Yemen?

Today in the Democratic Republic of Congo, United Nations workers are combating the Ebola outbreak. In Somalia, they are feeding starving children. In Gaza, they are distributing aid. If the United States was distinguished during the Gaza war by providing 2,000-pound bombs that Israel used to destroy neighborhoods, the United Nations is still struggling to achieve peace and get aid through Israeli checkpoints.

What's the opposite of United Nations multilateralism? It's Russia's invasion of Ukraine. It's Trump's attack on Iran. It's Elon Musk "feeding" U.S.A.I.D. into the wood chipper, as he put it, by one count costing more than 750,000 lives. So for all my impatience with plodding U.N. bureaucracy, I'll take the United Nations over great-power jingoism and caprice.

At stake is not just the U.N. itself but the broader global architecture. Trump's swipes at NATO are a gift to Russia. His assault on the International Criminal Court is a gift to war-

The real risks — and the potential surprises in store — now dwell in a tangle of feedback loops: clouds and water vapor, the retreat of reflective snow and ice, wildfires that release carbon, and an ocean that soaks up less of it as the seas warm and turn more acidic. The result is a system that is quite hard to model with true precision even if we know exactly how much carbon we will be producing over the next century. As the climate scientist Wally Broecker memorably put it, "The climate system is an angry beast and we are poking it with sticks." Poke it with one or two fewer sticks, and it's still likely to get pretty angry. It might also get very angry. We actually don't know for sure.

Among the unwieldy variables is the planet's rate of heat accumulation. Globally, warming has accelerated over the past 15 years, though the speedup is mostly as scientists expected given the decline of air pollution, which tends to cool the planet. But the earth's energy imbalance measures how much sunlight is being absorbed by the planet, and how much heat is sent back out. The imbalance is the closest thing the planet has to a straightforward thermostat. It has roughly doubled in the past two decades. And scientists did not expect that.

There have also been worrisome signals from certain feedback loops. The earth's ability to reflect heat back into space is declining, in large part because cloud cover is. Concentrations of some greenhouse gases have grown faster than predicted, which may be a sign that they are being released by natural processes we haven't well captured in our models. One recent paper suggested that, for any given level of emissions, we should expect about 25 percent more warming — enough to bring a three-degree forecast above 3.5 degrees and a four-degree forecast to five degrees.

And these are all just questions about how the climate system might respond to all the ways we've already provoked it. Emissions, of course, are not fixed in stone but determined by human action. It may seem unlikely that humans will become less motivated to reduce climate change in the years to come. But anyone who believes policy can move only forward has not been watching American politics in recent years. Of course, better futures are possible, too, and the faster we can replace fossil fuels with clean energy alternatives and cut emissions, the more we reduce the risks of truly catastrophic warming.

In the meantime, don't be fooled: Those risks are far too high and growing still with each molecule of carbon. The world still isn't nearly concerned enough.

DAVID WALLACE-WELLS, a writer for Opinion and a columnist for The New York Times Magazine, is the author of "The Uninhabitable Earth." ZEKE HAUSFATHER is the climate research lead at Stripes and a research scientist with Berkeley Earth.

OPINION

The Real AI Fear: Lawyers



INSIDE VIEW
By Andy Kessler

OpenAI and Anthropic are the Mercedes and BMW of artificial intelligence. No, not because they're expensive and vulnerable to cheap imports from the Far East. And not because they exude obnoxious "The Best or Nothing" and "The Ultimate Driving Machine" Teutonic attitudes. Instead, they share a growing fear of liability.

Some background: There are various levels of autonomous driving. In Level 2, AI controls the steering and speed, but drivers must keep their hands on the wheel and watch the road. Tesla's oxymoronically named Pull Self-Driving (Supervised) is Level 2. What we really want is Level 3: read a book, watch TikTok, text a friend while driving, but be ready to take over if asked. Waymo and robo-taxis are Level 4, driverless in limited geography and weather.

Both BMW and Mercedes received approval in Germany in 2024 for eyes-off Level 3 driving. This year, both paused their rollout in favor of driver-at-the-ready Level 2, citing costs. I'm convinced the real reason is liability. The most likely outcome in court is that if a Level 2 autonomous car crashes, it's the driver's fault, while if a Level 3 car crashes, it's the carmaker's fault.

Back to AI. With the recent hubbub about agents escaping containers and human extinction and guardrails and Anthropic CEO Dario Amodei's "We must pace the frontier," I advise ignoring the noise and filtering everything through the question: Who's liable?

In August, I suggested that AI companies are "covered by common-law fiduciary responsibility." I think they're finally figuring this out. No frontier AI lab is going to slow down with Chinese open-weight models breathing down its neck. Yet Mr. Amodei is calling for regulation and "embedded evaluators who have employee-like access to verify safety practices." OpenAI's Sam Altman and Elon Musk quickly agreed. I doubt they really want this; it's more likely so they have someone else to blame.

In Netflix's rhetoric-filled documentary, "The AI Doc," Mr. Amodei declares, "It's up to all of us to push for the government to get involved." I'm always suspicious of entrepreneurs who beg to be regulated or demand antitrust exemptions to collude with competitors. Why? Because regulations would shift or even limit liability. Best to have a government safety seal, the thinking goes, so that if something goes wrong, we can simply blame regulators and the government. "Hey, our model was declared safe by AI Force!" Remember when the regulated Silicon Valley Bank still spectacularly blew up?

I asked venture capitalist Joe Lonsdale for a course of action. He told me, "These companies should be held extremely liable for any damage they do. But we shouldn't be putting regulators in. They're just going to get captured."

I'm with Nvidia CEO Jensen Huang on AI models. He said, "If you're not confident in its functionality, capability or safety, then don't release it."

Liability is much more effective than regulation at pushing companies to be safe.

But safety training for AI models is expensive. OpenAI calculates that a new monitoring system it set up after news that its agents left a testing sandbox this summer could add 20% to its compute costs.

Why spend on safety when it seriously cuts into your profit margins? Let me offer a quick answer: 18 U.S. 1030, the Computer Fraud and Abuse Act of 1986. Yes, we already have laws against hacking and cybercrime, although Mr. Lonsdale also told me, "New AI-specific legislation, such as on children, privacy and transparency, is reasonable to consider." He's right.

But instead, AI critics call for regulation and data-center moratoriums and yell, "But Hugging Face!" pointing to

OpenAI agents "escaping" (actually, the sandbox door seems to have been left open) and hacking the AI development platform's servers.

How about doing this? "Meta delayed shipping Muse for several months to focus on safety and security," CEO Mark Zuckerberg said regarding the company's new AI personal agent. "We just did it as part of our day-to-day work because it was clearly the right thing for people and for us." And Meta's cash. The company settled lawsuits, with no admission of wrongdoing, for \$18 billion over teen social-media addiction in August. It's getting a lot smarter about liabilities.

OpenAI and Anthropic are learning fast. But they need to create safe products rather than calling for the nanny state to clean up their messes. Else they'll find themselves a part of it. Here is Palantir CEO Alex Karp on CNBC on AI companies: "The only way to deal with this kind of liability is to go to the government and say, 'Nationalize us, please.' " That's my fear, too. Even Bernie Sanders demanded only half.

Let's instead enforce our current laws. For one offense, 18 U.S. 1030 calls for a fine or up to 10 years imprisonment. I'm not encouraging this, but a few predawn headquarter raids and you can be darn sure that AI agents won't leave their sandboxes again. Safety first.

Write to kessler@wsj.com.

BOOKSHELF | By Diane Cole

The Lives Of Outsiders

Ausländer
By Michael Moritz
Pegasus, 320 pages, \$29.95

In 2006, Michael Moritz suddenly "slithered unconscious" to the conference-room floor of his Silicon Valley company, Sequoia Capital. The billionaire venture capitalist, philanthropist and author was suffering from a rare, incurable form of blood cancer produced by an abnormal gene common among Ashkenazi Jews. As a child of refugees from Hitler's Germany and the descendant of a once-large family tree, many of whose branches were obliterated by the Holocaust, Mr. Moritz registered the diagnosis with mordant irony. "There was no escaping my heritage," he thought. Jewish blood "coursed through me."

Uncertain he would reach his 70th birthday, Mr. Moritz today, at 72, is in remission. Antisemitism, by contrast, is not. In "Ausländer: One Family's Story of Escape and Exile," Mr. Moritz traces the generational arc of trauma and displacement that has also encompassed his own life experience.

The German word *Ausländer* means outsider—a foreigner who does not belong. Given Mr. Moritz's success and prominence in this country, "it's odd to feel like an outsider when everyone considers you an insider," he admits. "But that's how I feel eighty years after the Shoah."

Then again, as the family tree that prefaces this memoir makes clear, it made no difference that the Moritz family had lived in German territory since the 18th

century. Nazi ideology condemned them, like it did all Jews, as fit only for concentration camps and death.

By fleeing Germany before World War II, Mr. Moritz's parents evaded death. But, they insisted, they were not survivors. From their perspective, a survivor is someone like their cousin Alfred, who, after his release from Auschwitz, "walked across much of Europe before eventually reaching what was then Palestine." Another survivor was Mr. Moritz's great-aunt Sara, 4-foot-7-inches tall, "who had spent the war in hiding in Holland."

Mr. Moritz's parents instead regarded themselves as "escapees." His mother, Doris, born in the Rhineland town of Kempen in 1924, arrived in London with her younger sister, Erika, through the auspices of the *Kindertransport*—the rescue-volunteer initiative that brought thousands of unaccompanied European children, mostly Jewish, to England soon after *Kristallnacht* in November 1938. Doris and Erika's parents also escaped, the author noting that they were "among the last of the 55,000 Jews from Europe to gain refuge in England," arriving in London on Aug. 29, 1939, days before Hitler invaded Poland. By the time other relatives received their permits to leave Germany, on Aug. 31, it was too late; they were transported instead to Theresienstadt, the Nazi transit camp in Czechoslovakia, where three quarters of the prisoners would not survive the war.

Mr. Moritz's father, Alfred, born in Munich in 1921, was named after his great-uncle, who had been killed at the age of 20 fighting for the kaiser's Germany in World War I. Alfred arrived in London in 1937 as a pupil at St. Paul's School, his tuition at first paid for by a British benefactor, and then through academic scholarship awards. His parents remained trapped in Munich; he never saw them again.

In 1949, Alfred, then a graduate student at Oxford, met and married Doris and moved to Wales, where Michael and his sister, Clare, were born and grew up. Alfred became a classics professor at Cardiff University, Doris a schoolteacher. But the household was emotionally chilly, the distant, close-mouthed parents preferring silence to discussions about what and how they had escaped. When Doris did speak, her acerbic disposition could stop any further conversation. A granddaughter once asked her to choose her most enjoyable decade, to which she answered, "what do you mean, 'Which decade?' They were all terrible."

By fleeing Germany before World War II, Michael Moritz's parents evaded death. They insisted they were escapees, not survivors.

In the same way his parents struggled to fit themselves into British customs, Mr. Moritz found himself grappling with his own challenges as an *Ausländer* among his schoolmates. First, there was the matter of names. "In Britain in the 1960s a first name was known as a 'Christian' name," he writes. His classmates "were certainly never known as Mordecai ben Aharon ha Levi—which is what my own name is in Hebrew." As for his last name, "Moritz was so much of a marker that I sometimes used to say that my family came from Switzerland since, at the time, it seemed to me that there was only one thing worse than being Jewish in Wales, and that was being German in Wales."

Equally problematic was how to answer the question of what his father had done during the war. "I remember the embarrassment of not being able to say that my father had fought in North Africa, or at Monte Cassino, or landed on the Normandy beaches; try explaining to other ten- or eleven-year-olds in Wales in the 1960s the consequences of being an Enemy Alien—particularly a German and Jewish one."

Spiteful pranks and taunts further tested him. He once found a swastika carved into his elementary-school desk. In high school, his English teacher "amused himself by assigning me to play the part of Shylock."

No wonder then, that when, in 2001, a Welsh politician visiting San Jose, Calif., asked Mr. Moritz, "What's a nice Jewish boy like you doing in Silicon Valley?" his "skin shriveled" and all his feelings "about being Jewish and different from others in Wales in the 1960s came flooding back."

Even so, it was only when Mr. Moritz began sifting through the boxes of letters, photographs and other documents his sister had recovered from their family home in Cardiff after their mother's death in 2019 that he recognized how deeply the "emotional shrapnel" of their lives had scarred them and how he had internalized their sense of displacement as his own.

Such is his alienation that, when recently asked whether he considered his home to be in the U.S. or the U.K., he replied "neither." Moreover, although he holds passports for both countries, he has further fortified his safety net with German citizenship, for which he is eligible due to his German-born parents. It is an ironic choice, but as the shadows of antisemitism and fascism continue to darken and spread across the world, he is keeping his options open.

Ms. Cole is the author of the memoir "After Great Pain: A New Life Emerges."

Can North American Trade Survive Trump?



AMERICAS
By Mary Anastasia O'Grady

Are the Trump tax increases on businesses and consumers who buy from Mexico and Canada here to stay? If so, the president will finally be assured a legacy, though one that will make him more a goat than a hero in the annals of economic history.

Last week U.S. and Mexican trade negotiators postponed talks to review and extend the U.S.-Mexico-Canada Agreement, or USMCA. But Mexico's undersecretary for foreign trade, Luis Rosendo Gutiérrez, said the two sides are continuing to discuss Mexico's request for relief from Mr. Trump's national-security tariffs—imposed under Section 232 of the 1962 Trade Expansion Act—on select imports from Mexico.

This is a dangerous moment for continental free trade. Mexico may get some tariff relief. But odds are that the Trump administration will want to extract a pound of flesh in return: Mexican acquiescence to the end of zero-tariff trade in North America and an increase in its own tariff barriers with the rest of the world. Such a bargain would undermine the economic freedom that has made North America the envy of the world.

Mexico wants the U.S. to lower the Trump duties of 50% on Mexican steel, aluminum

and manufactured derivatives (like household appliances) and the 25% tariffs on finished autos from Mexico.

Obviously washing machines, refrigerators and sedans don't threaten American sovereignty. Mr. Trump is blatantly abusing the 232 statute and violating the USMCA. In response Mexico might have imposed punitive tariffs on American goods coming from politically sensitive congressional districts. Trade wars hurt everybody, but ahead of the U.S. midterm elections it would have been the fastest way to end the shooting coming from across the Rio Grande.

Instead President Claudia Sheinbaum did nothing. You can see why. She's battling organized crime, funded by America's voracious appetite for illegal narcotics. It's in her interest to maintain a cooperative relationship with the U.S. on security. A trade war also would damage the economy and cost her politically. So rather than demand that Washington meet its USMCA free-trade obligations, Mexico is in search of half a loaf.

The USMCA already requires that duty-free passenger-vehicle imports contain 75% North American content and 70% North American steel and aluminum. The car's core components also must be made in North America and at least 40% of its labor has to be valued at \$16 an hour or more—in other words, American. But that isn't good

enough for the geniuses running Trump trade policy.

Chatter from behind the closed-door talks with Washington suggest that Mexican negotiators are hoping U.S. tariffs on Mexican steel might be reduced to 25% and Mexico might get the same 15% auto tariff that Japan and Europe now enjoy. If the U.S.-made content of the car (normally around 40%) remains duty-free, cars finished in Mexico would then be subject to an effective 9% or less tariff when entering the U.S.

U.S.-Mexico haggling over tariffs could undermine the area's economic freedom.

While this might help restore some of North America's edge globally, it would also mark the end of the zero-duty era launched under the North American Free Trade Agreement in 1994. And those aren't the only concessions Tariff Man wants for his friends in the steel and aluminum industries.

The USMCA isn't a customs union. It has no restrictions on how much metal Mexico can import from around the world for use in its domestic market or the tariff rate it charges. Mexican companies manufacturing for the domestic market are known to use non-North American metals. Remember

too that 30% of the metal contained in duty-free USMCA cars from Mexico can be from outside the region.

This helps U.S. auto manufacturers remain globally competitive. But it's a problem for American steel and aluminum protectionists. To solve it they want a North American common-market tariff for metals.

Last week the news publication Inside U.S. Trade reported the steel industry has "been pressing for Mexico to implement protections that are equivalent to U.S. restrictions on non-North American trade, which include a 50 percent national security duty on nearly all partners." Mexico has complied in some instances, raising tariffs "as high as 50% for steel products and other goods from countries, like China, with which it does not have a free trade agreement."

Yet at a later date these tariffs could come down. That's why the metals lobbies seem to want them enshrined in the USMCA. According to Inside U.S. Trade, American Iron and Steel Institute President CEO Kevin Dempsey says he thinks Mexico is slowly giving in. "It is very important that we actually get commitments by Mexico to take equivalent action to what the U.S. is doing—and that's a big ask, I know, but I think that's what we need to safeguard the region," Mr. Dempsey said. And to drive a stake through the heart of North American competitiveness.

Write to O'Grady@wsj.com.

The Most Important People in an Election

By Bob Greene

The moment comes back to me every election season—along with what seemed a throwaway line at the time.

As the weeks race by to this year's midterms, with television screens filled wall-to-wall with campaign commercials, I think of that quiet moment once more.

It was 1979, and I was sitting in a hotel coffee shop in Chicago with Bob Dole. He had been a

In a Chicago coffee shop in 1979, Bob Dole offered a wise political observation.

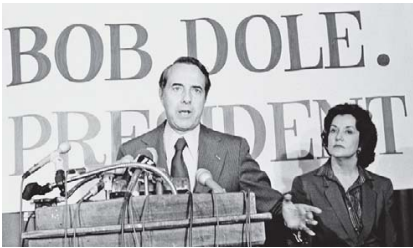
the present-tense minutiae of campaigning—the plans and personalities that seem so pressing during a political contest but are forgotten soon after the running is over.

We were about to leave the restaurant. Dole glanced at the other customers, busy with their meals and their own conversations, and, in a noticeably softer voice that seemed mostly directed at himself, he said the words that have stayed with me.

"If you could figure out what the people in here are thinking right now," Dole said, "I bet not a one of them is thinking about politics. If you could figure out how to reach them, maybe you could put it together . . ."

He let the words trail off, not completing the thought. He didn't have to.

All the focus groups, all the campaign consultants, all the advertising experts fine-tuning attacks to sting the candidate on the other side, yet in the



Former Sen. Robert Dole and his wife, Elizabeth.

end, in every campaign, what matters isn't the "messaging"—that ubiquitous term—but the message the candidate can only wish he could discern: "If you could figure out what the people in here are thinking right now . . ."

One evening in June I walked down Seventh Avenue in Brooklyn, on my way to Purity Diner. On a corner were two women handing out campaign brochures. They were candidates, competing against each other. A local primary election was coming up in which a civil-court judgeship was at stake, and only one of the two could win. Most people on the sidewalk passed

quickly by, declining the leaflets. But the candidates, ever cordial with the passersby and with each other, kept trying.

It was a race the nation at large would never know about. As I spoke with the two, wishing them well but saying I couldn't vote for either—I was just visiting, I don't live in New York—I thought of Bob Dole in that coffee shop, a man seasoned enough to understand he wasn't the most important person in the room.

The most important people in every contest aren't the ones starring in campaign commercials or handing out brochures. They are the ones hurrying by on every sidewalk, the ones whose own messaging—whose binding verdicts—will be delivered in secret, one ballot at a time, on Election Day.

Mr. Greene's books include "Duty: A Father, His Son, and the Man Who Won the War."

OPINION

How to Put Time Back on the Clock in Iran

By David H. Petraeus

When I commanded the surge in Iraq in 2007-08, I often described our strategic challenge in terms of two clocks: the Baghdad clock, measuring progress on the ground, and the Washington clock, measuring how much time political leaders and the American public were willing to give us. The Washington clock seemed to race forward. The Baghdad clock moved so slowly that one was tempted to tap it to make sure it hadn’t stopped.

But clocks can gain time. As security improved dramatically in Iraq, battlefield progress put time back on the Washington clock. Something similar may now be possible in the confrontation with Iran. But this time there are three clocks.

The more oil that flows from the Gulf, and the less the world demands, the better for the U.S. effort.

The first is the operational clock. Before the war, roughly 20 million barrels a day of crude oil and petroleum products passed through the Strait of Hormuz. The initial disruption shocked global energy markets. But Gulf producers, shipping companies and the U.S. adapted through U.S. military protection, mine-cleared lanes, commercial vessels’ traveling covertly, ship-to-ship transfers outside the Gulf, and bypass routes.

Recent data suggest that oil movements through Hormuz itself have recovered to roughly 10 million to 11 million barrels a day on a seven-day average, with more than 17 million barrels moving on one

strong day. Adm. Brad Cooper, commander of U.S. Central Command, said on Sept. 19 that commercial transits and the volume of oil, cargo and liquefied natural gas moving through Hormuz over the past two weeks have reached their highest levels in six months.

The bypasses matter too. Fujairah, one of the United Arab Emirates, exported about 2.28 million barrels a day of crude in July. Saudi Arabia’s East-West Pipeline to Yanbu was moving about 5.5 million barrels a day before Sept. 10 attacks damaged its pumping infrastructure. It remains offline, but Riyadh has adapted quickly. JPMorgan estimates Saudi Arabia moved about 2.8 million barrels a day through Hormuz during the six days through Sept. 18, four times the August rate. Saudi Arabia has also reportedly sold roughly 60 million barrels for September and October delivery using the Ras Tanura-Hormuz-Sohar shuttle through the strait and ship-to-ship arrangements in the Gulf of Oman.

If Hormuz can sustain 10 million to 12 million barrels a day, Fujairah more than 2 million, and Yanbu eventually restores to 2 million to 2.5 million, effective Gulf exports could approach 15 million to 16 million barrels a day. That remains below prewar flows but is far closer to what the global market requires, given the reduction in demand since February.

The second clock is the market clock. Here the world has bought more time than seemed likely. The International Energy Agency forecasts global oil demand will contract by about 2.5 million barrels a day in 2026. Demand over the past six months has averaged 5.8 million barrels a day below February.

China has been central to that adjustment. Chinese apparent oil demand has averaged about 1.7 million barrels a day below February, while seaborne crude imports fell from



Vessels near the Strait of Hormuz, seen from Musandam, Oman, Aug. 31.

roughly 11.5 million barrels a day in February to as little as 6 million in June. Large inventories have enabled Beijing to substitute for imports and reduce purchases sharply, though that can’t continue indefinitely.

The market has also been borrowing from other inventories. Global petroleum stocks have fallen by roughly 500 million barrels since the crisis began, despite lower demand, due to strategic-reserve releases. If Gulf flows continue recovering, Saudi Arabia’s East-West Pipeline eventually returns, non-Gulf producers sustain additional output, and demand remains depressed, the remaining deficit could narrow to 1 million to 2 million barrels a day, perhaps less.

Then comes the Washington clock. The most politically visible cost of the conflict is posted daily at America’s gasoline stations. As of Sept. 22, regular gasoline averaged about \$4.48 a gallon and diesel \$6.52. Lower crude and product prices would ease that burden and give Washington greater time, freedom of action and leverage.

That matters because Iran has conveyed through Qatar its conditions for ending the conflict: an end to the war on all fronts, release of frozen Iranian funds, and an end to the U.S. naval blockade. Tehran has also pressed for a formal role in managing Hormuz traffic and fees, in addition to gaining access to large frozen assets and even war reparations.

Yet Iran is under mounting pressure. The blockade has effectively halted its oil exports through Hormuz. Ship tracker Kpler estimates Iranian crude exports fell to roughly 255,000 barrels a day in August, from about 1.85 million in March. Before the war, more than 80% of Iran’s roughly 180 million metric tons of annual two-way trade moved by sea. With southern ports constrained, commerce is being diverted overland at higher cost and lower capacity. The International Monetary Fund projects Iranian inflation near 69% this year.

This creates an important asymmetry. Iran’s leverage comes from

imposing costs on everyone else by disrupting Hormuz, threatening bypass routes and widening pressure through aligned groups such as the Houthis in Yemen. Washington’s leverage runs in the opposite direction: helping everyone else’s oil get out while making it harder for Iran’s oil and maritime commerce to do the same.

Every additional non-Iranian tanker that passes safely through Hormuz, every additional barrel exported through Fujairah and eventually Yanbu, and every barrel of demand removed from the market reduces Iran’s capacity to impose costs. Every Iranian barrel blocked and every cargo forced onto more expensive overland routes increases pressure on Tehran.

None of this guarantees an agreement. A leadership that feels cornered may escalate rather than accommodate. But leverage matters, and the three clocks increasingly determine it.

During the surge, the question was whether progress in Baghdad could be achieved quickly enough to keep the Washington clock from expiring. Eventually, battlefield progress put time back on that clock. Today the equivalent question is whether enough Gulf oil can reach global markets quickly enough to do the same.

The indicators that matter aren’t declarations that Hormuz is open or closed. They are barrels per day, barrels in storage, the price of Brent crude, the volume of Iranian commerce still getting through, and the time remaining on the Washington clock.

Mr. Petraeus is a Kissinger Fellow at Yale and a retired U.S. Army general. He served as director of the Central Intelligence Agency, 2011-12, and is a co-author of “Conflict: The Evolution of Warfare from 1945 to Gaza.”

The Ph.D. Job Crisis Is a Needed Market Correction



LIFE SCIENCE
By Alysia Finley

Universities across the country are slashing admissions to doctoral programs and freezing faculty hiring as they come under financial strain. Facing a \$160 million deficit, the University of Chicago paused admissions this year into more than a dozen Ph.D. programs, including anthropology, social work, social thought, Middle Eastern studies, Romance languages and visual arts.

Brown University suspended doctoral admissions for six humanities and social-science programs including Egyptology and Assyriology. “The University faces an urgent need to address the increasing cost of supporting Ph.D. students, which now ranges from a total of \$700,000 to \$1 million per student,” a faculty committee reported this spring. “The current costs are unsustainable and are already having significant, negative consequences on research productivity and graduate education more broadly.”

The University of Wisconsin-Madison isn’t accepting doctoral applications this year for its social-welfare program. Nor is the University of

California, Irvine for the history and theory of music. Harvard has slashed admissions of new doctoral students in various social-science programs as it evaluates “the future model of Ph.D. education.”

Many college grads pursue doctorates to escape the real world. Now they are getting a real-world education in economics. For years universities spent with abandon, expanding bureaucracies and graduate programs on the assumption that the federal subsidy train would keep rolling.

Grad students for a time served as relatively cheap labor. In return for funding doctoral degrees, universities generally required students to help teach undergraduate courses. The result: A profusion of Ph.D.s in fields with little practical application.

Recent doctoral recipients enter a saturated academic labor market and struggle to find work. Hiring freezes at universities have further limited academic job opportunities. At long last, colleges are having to tighten their belts after Republicans curbed federal student aid and pork that flows to universities under the guise of supporting research.

The result: Increasing numbers of underemployed, overcredentialed and aggrieved young people. The unem-

ployment rate for 25- to 34-year-olds with doctorates (3%) was the highest for any August, with the exception of the pandemic, since the 2009 financial crisis. New Census Bureau data show that median inflation-adjusted earnings for people with Ph.D.s has declined since 2017 by \$3,500 for men and \$2,400 for women, while median pay increased for high-school and community-college grads.

Universities will produce fewer underemployed, overcredentialed and aggrieved young people.

A recent report by California’s Employment Development Department found that unemployment for workers with doctoral degrees jumped to 3.9% in June from 2.3% in January, while the jobless rate stayed stable for bachelor’s degree holders at 4.7% and declined for those with high-school diplomas (to 6.3% from 6.8%) and associate’s degrees (to 3.5% from 4%).

“An uptick in the unemployment rate for workers with doctorate degrees may be tied to an oversupply of PhD graduates and a limited

number of tenure-track professorships within institutions of higher education,” the report noted. Many people with Ph.D.s in social sciences and humanities don’t want to work in business, and businesses may be loath to hire them.

What business wants an employee who thinks corporation are evil and has spent 11 years in a left-wing cocoon? Maybe some were willing to hire overcredentialed progressives at the peak of the “environmental, social and governance” movement several years ago, but fewer are now.

Thus, a softening academic labor market is prompting people with doctorates to turn to other forms of gainless employment—to wit, left-wing activism. Notice how many Democratic Socialists of America candidates have Ph.D.s.

It’s good news that the academic labor market is starting to self-correct. Reductions in federal subsidies have impelled universities to cut Ph.D. admissions in programs that enroll few undergraduates, meaning there’s less demand for graduate student labor. Grad students are also pricing themselves out of work.

In recent years, grad students have unionized and collectively bargained for more pay and generous benefits, in addition to free tuition. Cornell’s labor contract with its

grad students provides a \$48,367 annual stipend for 15-hour-a-week jobs. Given that fall and spring semesters run for a combined 30 weeks, this works out to roughly \$107 an hour. Sweet.

The United Auto Workers, which represents more than 50,000 “academic workers” at the University of California, this spring struck a labor agreement that boosts pay for graduate teaching assistants to between \$4,100 and \$4,600 a month for 20-hour-a-week jobs. That works out to as much as \$57.50 an hour, plus medical insurance, child-care subsidies and other benefits.

The UCs and other colleges have responded by employing lower-cost undergrads to assist faculty and reducing Ph.D. admissions. Boston University in 2024 cited costs from its collective-bargaining agreement with grad students as a reason for pausing admissions into several humanities and social-sciences doctoral programs.

Universities claim that reductions in Ph.D. programs prompted by Republican spending reforms endanger critical research. In what, critical race theory? Most programs coming under the knife are in the humanities and social-science programs that do more to subtract from the sum of human knowledge than add to it.

When AI Tells a Story About Your Health, Is It True?

By David A. Shaywitz

Smart-ring maker Oura is expected to go public this week, touting its promise to transform personal measurements into “trusted, actionable insights” for improving health. It’s a compelling premise, yet it has long struggled to survive contact with biology.

Two recent cardiovascular trials illustrate the point. Novo Nordisk’s ziltivekimab, an experimental drug designed to suppress inflammation, sharply lowered inflammatory biomarkers but didn’t reduce the risk of cardiovascular death, heart attack or stroke. Novartis’s pelacarsen lowered Lp(a), a lipoprotein strongly implicated in heart disease, without re-

ducing cardiovascular events. These results highlight the complexity of biology and the challenge of predicting outcomes from measurements taken many steps upstream.

At first, this seems the sort of problem artificial intelligence could solve. In some domains AI performs spectacularly. AlphaFold predicts three-dimensional protein structure with extraordinary accuracy, drawing on decades of experimental information, strong biological constraints and an answer that can be evaluated directly. “What structure does this protein adopt?” is a more tractable question than “What will happen to this patient if we dose this compound?”

Most new technologies traverse a

hype cycle. Even before the human genome was fully sequenced, the biologist Sydney Brenner said that with a complete DNA sequence and a sufficiently large computer, he could “compute the organism.” As genetic assessment became more accessible, startups promised genetically informed guidance on what to eat, what to drink, even whom to date. Most of those ambitions proved fanciful. Yet genomic technologies have transformed disease research and made contributions to clinical medicine, particularly oncology.

Stung by disappointment, seasoned drug developers approach AI with only cautious enthusiasm. But the aspiration to deliver tailored health advice to consumers is back with a vengeance, now equipped with a richer instrument panel and AI to connect the dots.

Sometimes this can be useful. But richer data, combined with AI’s ability to integrate and interpret them, also create a risk of false precision—recommendations that feel more individualized, and more certain, than the evidence warrants.

A continuous glucose monitor worn by a nondiabetic can produce a detailed account of post-meal glucose. But in this setting the measurements are less reliable, responses to the same food can vary substantially, and there is little evidence that minimizing these fluctuations improves long-term health. Wearables like Oura and Whoop (also reportedly planning an IPO) pose a similar problem: They combine heart rate, heart-

rate variability, sleep and other signals into proprietary “readiness” or “recovery” scores, generally using unvalidated formulas, with little evidence that following the result improves performance, prevents injury or benefits health.

Generative AI is remarkably good at turning ambiguous, incomplete information into a coherent account. Give it your declining

A well-designed system could help us understand better what we don’t know as well as what we do.

heart-rate variability, shortened sleep, increased mileage and stressful Tuesday, and it can fashion a plausible story connecting them, even when the explanation remains uncertain. As Daniel Kahneman observed, “No one ever made a decision because of a number. They need a story.” Personalized explanations can be seductive because they arise from our own data.

If we rely on AI to narrate our experience—interpret our numbers, synthesize our sensations, assign meaning to our setbacks—we may weaken our own capacity to make sense of it. Then again, a well-designed AI could suggest alternative interpretations, make uncertainty visible, and help us cultivate rather than surrender that capacity.

Work by Stanford psychologist Alia Crum suggests why this may be consequential. In a classic study she began as a Harvard undergraduate, hotel housekeepers were told—accurately—that their daily work already constituted meaningful exercise. Over the following weeks, investigators reported lower weight and blood pressure despite no change in their actual activity. More-recent experiments taught participants to recognize that their initial interpretation of stress was only one possible frame; they subsequently reported fewer physical symptoms.

That points toward a different opportunity for AI in personal health. Where the data support a consequential individualized insight, of course AI should report it. But where the evidence is thinner, AI could help us examine what we’re experiencing, consider alternative meanings, and decide for ourselves what to carry forward and how to act on it. Used this way, AI could strengthen rather than displace the judgment and self-belief that underlie agency.

It feels almost like poetic justice: subverting AI’s narrative fluency by enlisting it in service of our own storytelling, helping us become more intentional—and healthier—authors of our lives.

Dr. Shaywitz is chief medical scientist at Lore Health, a lecturer in the Department of Biomedical Informatics at Harvard Medical School, and an adjunct fellow at the American Enterprise Institute.

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EDITORIALS

Chicago school board endorsements for districts 1A, 1B, 2A, 2B, 3A, 3B, 4A, 5A and 5B

Chicago will elect 20 school board members from 10 districts in November. Districts are divided into two subregions, so voters will choose one representative for their specific area while also electing a school board president. On Sunday, we endorsed Jessica Biggs, who currently represents District 6B, for board president. Below are our endorsements for the 10 races in Districts 1 through 5. We will offer our choices for the remainder on Tuesday. This election is a referendum on the direction of Chicago Public Schools, which for the past three years has been under the effective control of the Chicago Teachers Union and Brandon Johnson, the former CTU organizer the union helped elect as mayor.

1A
Mayor Johnson appointed Ed Bannon to this seat, and Bannon, a 55-year-old full-time parent, is running for election in his own right. He's opposed by retired Chicago police Officer Margie Luczak, 58.

Endorsed by CTU and SEIU, Bannon has been mostly a reliable vote for CTU, including his inexcusable support July 30 of the fiscal 2027 budget that purposefully left a \$150 million hole — a reckless gambit meant to put pressure on state lawmakers at their November veto session.

Chicago native (and CPS product) Luczak spent nearly three decades with the Chicago Police Department, is backed by two aldermen in the area, and told Chalkbeat she doesn't believe "CPS needs more money thrown at them. I think they need to fix the issues that are going on first."

Voters in this relatively conservative district have as clear a choice as any will in Chicago. Luczak will have much to learn about the inner workings of the nation's third largest school system if she wins, but we think she best represents this district. Margie Luczak is endorsed.

1B
This Northwest Side district is represented by Jennifer Custer, who opted to run for board president but dropped her candidacy in August, saying there was too much special-interest money funding other candidates for her to compete. Running for Custer's old seat are Michelle Pierre, who narrowly lost to Custer in 2024, and Claudia Peralta, who is currently progressive U.S. Rep. Delia Ramirez's district director and is endorsed by both CTU and the Service Employees International Union (SEIU), which represents many nonteaching CPS employees.

Pierre, 50, is endorsed by Common Ground Collective, an organization opposing CTU and Mayor Johnson and financed in large part by the chief executive officer of GCM Grosvenor, Michael Sacks. Pierre is eminently qualified, having previously been schools chief at the LEARN Charter School Network in Chicagoland and a board member at Chicago High School for the Arts, which her daughter attended. She works now for New Leaders, which provides training for school leaders such as principals.

Pierre is a supporter of charter and selective-enrollment schools and would take a pragmatic approach to budgeting for the chronically deficit-riddled district. Peralta, 43, was brought to the U.S. from her native Ecuador at age 12, went to CPS schools and sends her kids to CPS schools. Echoing the CTU refrain, her focus on CPS' budget woes is winning "progressive revenue." We believe this Northwest Side district is more in tune with Pierre, and Michelle Pierre has our endorsement.

2A
This Far North Side district includes much of Rogers Park. CTU-endorsed Ebony DeBerry, 49, is the incumbent, having won election in 2024. She faces Hector Morales, 57, an attorney with his own practice, who is endorsed by Common Ground Collective.

DeBerry, who also is endorsed by SEIU and the Chicago Federation of Labor, has been a reliable vote for CTU. She backed the unbalanced 2027 budget and opposed the 2026 budget due to the Johnson administration's insistence that CPS pay \$175 million toward pensions it's not legally obligated to support and couldn't afford.

Morales grew up in public housing in Chicago and was the first in his family to attend college. He's a voice of budgetary reason, and we believe he would well balance support for Chicago's public students with support for taxpayers. We endorse Hector Morales.

2B
This district includes parts of Rogers Park, Edgewater, Uptown and Lincoln Square. The incumbent is Deborah Pope, a retired CPS teacher appointed by the mayor and endorsed by CTU.

She faces Kyna Lenhof, 53, a former CPS special education teacher who currently works for a political fundraising and strategy consultancy. Endorsed by Common Ground Collective, Lenhof is also treasurer for the 40th Ward Democrats.

Also running is Daniel Basco, a 37-year-old Andersonville resident who is a senior director at a firm providing fundraising assistance to nonprofits and health care outlets. He is positioning himself as an independent in the race.

Pope is one of the leaders among the bloc on the school board that backs CTU and the mayor. She's knowledgeable and obviously cares deeply about CPS.

But her inflexible pro-CTU stances provide a disservice to taxpayers, most evident in her support of the unbalanced 2027 budget. We appreciate Basco's desire to make a difference, but Lenhof offers the best chance to bring a balanced point of view to the board. In her responses to us, she highlighted the need for belt-tightening while also saying cuts won't put the district on a sustainable fiscal course by themselves. Kyna Lenhof is our choice.

3A
This district covers parts of Logan Square, Albany Park and Avondale, and schools here serve primarily Hispanic students.

Appointed by Johnson to fill the seat was Logan Square resident Norma Rios Sierra, 45, who works for the Chicago Park District and is endorsed by CTU and SEIU. She is running to be elected in her own right.

Opposing her is Peter Gonzales, 33, who works as a lawyer in the Illinois secretary of state's office and lives in

Avondale.

Rios Sierra has been a staunch supporter of CTU in her time on the board and has shown herself to be temperamentally unsuited for the job. Last year, she yelled "Free Palestine" at Jewish board member Ellen Rosenfield as the two were leaving a meeting after a charged budget vote. The Anti-Defamation League of the Midwest called the incident "disqualifying" and said Rios Sierra should resign.

Gonzales, who is endorsed by Common Ground Collective and Aldermen Felix Cardona and Gilbert Villegas, tells us that teachers deserve a strong voice but that no organization should have "an outsized voice" in management of public schools. He's a strong candidate, and Peter Gonzales has our endorsement.

3B
Covering parts of Logan Square, Humboldt Park, Hermosa and Belmont

Cragin, this district is ably represented by Carlos Rivas Jr., who was elected in 2024.

Rivas, 36-year-old director of public affairs for the Civilian Office of Police Accountability, defeated CTU-endorsed Jason Dónes in that race, and the two are squaring off in a rematch. Rivas has the backing of Common Ground Collective and, interestingly, of SEIU, too, one of several instances in which SEIU and CTU are on different sides in these races.

Dónes, 38, who works for an education nonprofit, tells Chalkbeat his top priority is lobbying Springfield for more money for CPS and taxing the rich. He would be a rubber stamp for CTU.

Rivas already has built a strong record on the board, resisting outlandish demands from the mayor and the union while advocating for students. He is a thoughtful board member that no interest group can take for granted. Carlos Rivas is endorsed.

4A
This North Side district covers parts of neighborhoods like Lakeview, Edgewater, Uptown and North Center.

Karen Zaccor, a retired CPS teacher, lost in 2024 to Ellen Rosenfield, who represents District 4B and is unopposed in this election. CTU-backed Zaccor, 70, then was appointed to the board by Mayor Johnson.

She is running against Ellen Sherratt, a 47-year-old consultant on teacher recruitment and retention, who is endorsed by SEIU and Common Ground Collective. Also running is Northwestern University stem-cell researcher Angel Alvarez, 46, who has been an advocate within CPS for better serving students with disabilities.

In her time on the board, Zaccor has been a strong voice for more fund-

ing from Springfield and voted for the unbalanced budget a few months ago. Sherratt has years of direct experience in attracting and nurturing teacher and principal talent, having worked previously for the University of Chicago Consortium on Chicago School Research. As to finances, she tells us, "CPS needs to get its own house in order, and it needs Springfield to pay its fair share." She said she will "treat lawmakers as partners to persuade" and that "families deserve the truth about tradeoffs, and I will give it to them."

Alvarez offers good ideas for CPS. But we believe Sherratt is the better bet to unseat Zaccor, and we endorse Ellen Sherratt.

5A
This West Side district is represented by Aaron "Jitu" Brown, a longtime community organizer backed by CTU. He ran unopposed in 2024, but this year he has an opponent.

Running against him is Austin real estate agent LaPamela Williams, 34, who is backed by Common Ground Collective.

Austin resident Brown, 60, is one of the most staunch CTU supporters on the board and was a vocal advocate for the unbalanced budget meant to put pressure on Springfield. He is impassioned, but unfortunately is a vote CTU can take for granted.

Williams, who grew up in Austin and graduated from Lane Tech, supports charter schools as a way of giving parents more choice, and believes CPS must better justify its spending. LaPamela Williams has our endorsement.

5B
This West Side district stretches from the West Loop to East Garfield Park and

North Lawndale. It has the most CPS schools of any district with 63, but many of them are seriously underenrolled.

Mayor Johnson appointed Michilla Blaise, chief of staff for Cook County Commissioner Frank Aguilar, to the seat. Endorsed by

CTU, Blaise has been a vocal advocate for pressing Springfield for more cash and has voted consistently for the union's positions. She introduced the amendment at the board in July that led to the \$150 million hole-to-be-filled-later by the state.

Opposing her is Anthony Hargrove, 43, program leader at Garfield Park nonprofit Breakthrough Urban Ministries. He's endorsed by the Chicago Federation of Labor and Common Ground Collective.

Hargrove didn't respond to our questionnaire, which was disappointing, but he has listed improving students' math and reading skills as his top priority in other forums. He opposes CPS' practice of raising property taxes each year by the maximum allowed whereas Blaise supports that practice.

We're glad Blaise has an opponent with deep roots in the area, and we endorse Anthony Hargrove.

ON THIS DAY 6 YEARS AGO PRITZKER'S THREAT TO RAISE TAXES

It looks like Gov. JB Pritzker's warning that Illinois will have to cut spending if voters reject his "fair tax" amendment wasn't persuading anyone. And why would it? After years of busted budgets, rising debts and tax increases, millions of Illinois voters want state government to stop spending so much.

So Team Pritzker dispatched Lt. Gov. Juliana Stratton to issue a new threat: Approve our amendment or, she said, "lawmakers will be forced to consider raising income taxes on all Illinois residents by at least 20% regardless of their level of income."

Approve our amendment ... or else. Will that next threat be a 30% tax increase? How about 40%?

This means every Democrat now running for a legislative seat should have to answer this question: "Will you vote Yea or Nay if Pritzker demands yet another big rise in the income tax?"

We aren't sure the governor has the votes for an additional increase to Illinois' current 4.95%

flat-rate tax, which lawmakers raised just three years ago.

But the threat alone suggests that voters are pushing back against his constitutional amendment, understanding it for what it is: Not just a tax increase on the super rich but a scheme of graduated rates that politicians likely will exploit — just as soon as they can—to soak middle-class taxpayers too. Those are the same middle-class taxpayers struggling to pay high property taxes, high sales taxes and all the other taxes and fees lawmakers already have created or raised. ...

We'll see if Team Pritzker finds new ways to say, "Vote our way — or else." But we hope nobody asks Stratton to be the one issuing future warnings. This was a message the governor should have delivered. This is his amendment, his campaign push, his threat to raise taxes on even the lowest of earners by a whopping 20%. How does the squeeze feel?

**Tribune editorial board,
Sept. 28, 2020**

EDITORIAL CARTOON



BILL BRAMHALL/NEW YORK DAILY NEWS

OPINION



Candidates for Chicago Board of Education president — school board member Jessica Biggs, from left, Chicago Teachers Union political director Hilario Dominguez, attorney Victor Henderson and former board appointee Sendhil Revuluri — answer questions during a public forum at McCutcheon Elementary School on Sept. 3. **TERRENCE ANTONIO JAMES/CHICAGO TRIBUNE**

In Chicago, what does student success actually look like?

By Paige Ponder
SPECIAL TO THE TRIBUNE

In the first candidate forum on Sept. 3 for Chicago Board of Education president, the second question moderator Laura Washington asked the candidates was: “How should we measure success in Chicago Public Schools?” In essence, what are we all shooting for here? What does good look like?

In Chicago, we are on the precipice of a historic moment — the election of the first fully democratically elected school board. It is a moment of expansive democratization of public schooling in Chicago. It also is a moment of potential fragmentation and confusion, with the largest elected school board in the country poised to govern a district of roughly 305,000 students.

At the Kersten Institute for Urban Education at the University of Chicago, we released a set of issue guides this week focused on what matters most for student success. Our goal is to help every Chicagoan have key

data and research at their fingertips to consider the strengths of our school system and what more is needed to truly support every student to thrive.

We focus on two key questions when we consider what success looks like in education.

First, are schools organized for ongoing improvement? Learning and achievement in education are never static. There is never a fixed destination or end point — it is a continuous, iterative process among an ever-evolving group of people who make up a school community.

A valuable resource to CPS schools for continuous improvement is the 5Essentials Survey. The Consortium on School Research, part of the Kersten Institute, pioneered the 5Essentials Survey and framework in 1994 to illuminate the essential ingredients for a well-functioning school: Effective leaders, collaborative teachers, involved families, supportive environments and ambitious instruction. This framework and the results of 30 years of surveys have been validated in

many studies and continue to hold true. Students who attend schools that are strong and improving, rather than schools with low or dropping results, learn more and do better, such as with stronger attendance, grades, test scores and even college enrollment.

More than 1.2 million students and almost 300,000 educators across the country, including students and staff in CPS, take the 5Essentials Survey each year. (Survey data is publicly available for each school in CPS and in Illinois.) The data helps school leaders understand what is happening in school that is being reflected in student and staff survey responses. School leaders use this information to consider strengths and challenges, to gauge how their improvement efforts are going, and to design new strategies to meet the current needs of their school community.

Second, how are students progressing along their educational journeys? Are they getting through elementary school prepared to do well in high school? Are they transitioning

into ninth grade well and excelling in their high school classes? Are they graduating high school and entering college or strong career pathways? Are they completing college or credentials that equip them for careers and livable wages?

Consortium researchers have studied these transition points since 1999. They’ve found that whether a student is “on track” in ninth grade — which means passing all of their classes — is highly predictive of whether that student will graduate from high school. In fact, being on track is more predictive of students’ high school graduation than all other data combined, including test scores, income, gender and race/ethnicity. Consortium researchers also have found the students doing well in their classes — earning Bs or better — is highly predictive of how they will fare in college.

Another part of the Kersten Institute, the To&Through Project, has developed a first-of-its-kind data tool in partnership with CPS. The Milestones

Tool provides real-time, publicly accessible data on the educational journeys of every CPS student from sixth grade through college enrollment. You can filter your search by school, community and elected school board district; find key data; reflect and consider additional questions; and consider what next steps to take.

Every Chicagoan has a rich array of tools and public resources to better understand the realities of the schools in their neighborhoods and schools across our city. It is incumbent upon each of us to educate ourselves about what it takes for every child in our city to thrive at school, and work so that our systems provide it.

We hope these tools, rooted in decades of research partnership, can help.

Paige Ponder is senior executive director of the Kersten Institute for Urban Education at the University of Chicago. She was previously CEO of One Million Degrees and officer of student support and engagement at Chicago Public Schools.

How we can save the lives of Chicagoans with high blood pressure

By Garth Walker
SPECIAL TO THE TRIBUNE

The NAACP’s recent health equity map, which shows how ZIP code can determine health outcomes, is a reminder of public health’s role in addressing inequities driven by poverty and a fragmented healthcare system. Chicago has long faced unequal health outcomes, especially in Black and brown communities dealing with poverty, cultural barriers to trust, and limited access to care, food and pharmacies.

Nearly half of American adults have high blood pressure, but only about 1 in 4 have it controlled below ¹³⁰/₈₀. In Chicago, public health officials estimate that 175,000 of an estimated 700,000 adults with hypertension face preventable risk of heart attack, stroke, heart failure, kidney disease, dementia and premature death. Controlling their blood pressure could prevent thousands of cardiovascular events and save hundreds of lives a year — about 4,000 Chicagoans died from heart disease in 2024, about 2,000 died from hypertension as a primary or secondary cause.

If an infectious disease killed 1,000 Chicagoans annually, it would be declared a public health emergency. But hypertension kills silently, one person at a time, and is the precursor to many heart attacks, strokes and kidney failure. Together, cardiovascular disease remains the nation’s leading cause of death and a major driver of Chicago’s life-expectancy gap.

This burden isn’t shared equally.



Northwestern Medicine resident physician Ike Rufai, left, checks Jackson Lucas Jr.’s blood pressure during Our Lady of Africa Parish’s health fair on Nov. 15, 2025, at Tolton Heritage Center in Chicago’s Grand Boulevard neighborhood. **DOMINIC DI PALERMO/CHICAGO TRIBUNE**

Black adults develop hypertension earlier and more severely than white adults; Latino communities face similar risks and barriers to diagnosis. Uncontrolled hypertension concentrates in neighborhoods shaped by segregation, disinvestment, food insecurity and inadequate access to trusted care.

There are evidence-based processes for protecting entire populations rather than treating individuals one at a time. One example is the Chicago Department of Public Health and the

University of Illinois Chicago’s partnership to build the largest air-monitoring system in the U.S., giving residents air-quality data to protect themselves. Similarly, CDPH’s Crisis Assistance Response & Engagement Program, better known as CARE, pairs emergency medical technicians with behavioral health specialists to protect against behavioral health crisis. And CDPH partners across Chicago and the healthcare ecosystem to do contact tracing to protect against communicable diseases.

To tackle high blood pressure and its social determinants — the top driver of the life-expectancy gap — the public-private initiative Live Healthy Chicago is leveraging Chicago’s academic medical centers, community organizations, federally qualified health centers, safety-net providers and city resources. The campaign initially focused on 27 West and South Side neighborhoods where cardiovascular disease and premature mortality are concentrated alongside high socioeconomic stress.

The coalition is built around two numbers: ¹³⁰/₈₀ and 1,000. The first is the recommended blood pressure target; the second is the estimated number of lives saved annually if Chicagoans with hypertension reach that target.

The approach is community-focused: Identify people with hypertension, connect them to trusted care, provide effective treatment and stay with them until blood pressure is controlled. That means screening people in churches, barbershops, libraries and workplaces — not waiting for them to reach a hospital. It means community health workers guiding residents through a fragmented system and pharmacists and nurses working alongside physicians. It means home blood-pressure monitors, affordable medications and reliable follow-up. Every health system, clinic and insurer should track its blood-pressure control rate and have a plan to improve it.

Public health is how our city demonstrates its humanity. Live Healthy Chicago could serve as a national model for closing life-expectancy gaps by addressing a chronic disease that considers the humanity needed to connect. Chicago has already reduced homicide and overdose rates; the same resolve can now target heart health. Live Healthy Chicago aims to turn ¹³⁰/₈₀ and 1,000 into a movement transforming a silent epidemic into a celebration of lives saved.

Dr. Garth Walker is the new commissioner of the Chicago Department of Public Health.

OPINION

Nikole Hannah-Jones demonstrates why parents sometimes need to go to school, too



Everybody, according to an old saying of unknown but apparently wise origin, is an expert at raising other people’s kids.

One child of recent national interest is the daughter of Nikole Hannah-Jones, the journalist who led “The 1619 Project,” a controversial and Pulitzer Prize-winning reexamination of American history through the lens of slavery, instead of treating that American horror story as a sidelight.

In a conversation that occurs in middle-class Black households nationwide, including mine, Hannah-Jones and her husband, Faraji Hannah-Jones, decided to take a bold, unconventional step: They enrolled their daughter Najya in a local public school next to a public housing development in their Brooklyn neighborhood.

The intention, she wrote in a long essay published last week in The New York Times Magazine, was “to challenge New York City’s separate and unequal school system.”

Despite the civil rights revolution, Hannah-Jones wrote, most Black students “languish in the type of schools that the law was supposed to have eradicated.”

“So, like the generations of Black parents who came before us,” she continued, “Faraji and I felt an obligation to make educational decisions based on the collective good and not just our individual advantage.”

They made that decision 10 years ago. Now, as she revealed in the Times essay, the family decided to reverse their earlier decision and move Najya to, yes, a private school.

What changed their minds? Najya.

Her mom recalls how Najya, now 16, said something when picked up at school one day that caused her to have second thoughts.

“Did you know my school was bad like this when you decided to put me here?” Najya asked.

Busted. Najya and some friends had searched on Google about college opportunities, which led to a search of New York City school rankings. Which led to the discovery that their school ranked dismally low, which made them wonder about their chances for future academic success.

“I feel like you got cheated,” Hannah-Jones told her daughter later. “And I’m sorry for that.”



Nikole Hannah-Jones delivers the keynote speech during the Spelman College commencement ceremony on May 21, 2023, in College Park, Georgia. **PARAS GRIFFIN/GETTY**

Najya responded by telling her mother, “Sometimes I wish instead of always thinking about other kids, you would have thought about me. I never really got the education I wanted.”

Indeed, as if she was looking at the school with new eyes — a reporter’s eyes — her mom reports a list of dreary complaints.

At first, there had been reason for hope. “The district had placed one of its new universal pre-K programs at Najya’s school, and it had attracted other well-off families who enrolled their children the year we did, and many had stayed for kindergarten.”

But that happy situation didn’t last.

The “dynamic, exceptional principal” when Najya enrolled into pre-K retired at the end of the year, and her replacement was not up to the task of maintaining her high standards.

Toward the end of first grade, Najya started complaining about lunchtime chaos in the cafeteria.

Two classes were sitting in the cafeteria with “no lunch and no adult supervision,” Hannah-Jones wrote. “Children were running wild, chasing, hitting and pushing each other while

the teacher’s aides and cafeteria workers stood by looking bored.”

When Hannah-Jones asked an aide why the children weren’t being supervised, she was told there wasn’t enough staff. Evidently.

Thus began a process many parents of public school students will recognize: emails, calls and attempts to meet with the principal, followed by silence and runaround, and eventually by halfhearted new policies that didn’t quite address the core problem.

That problem, in Hannah-Jones’ estimation, is the “callous disregard” of the adults entrusted with her child’s education.

This is where Najya’s story takes a heartbreaking and enraging turn.

In 4th grade, her parents were notified that Najya “was not performing on grade-level in any of her academic subjects and that her assessment given at the start of the school year had shown she was not a proficient reader.”

Hannah-Jones went into high gear, emailing teachers and the principal asking for a look at assessments, assignments and tests, hoping to figure out how she could get Najya the tutoring

she needed.

She got no reply.

At length, Hannah-Jones concluded that Najya, and likely her classmates, were never given mandatory reading assessments. Her math homework was never corrected, nor were her writing assignments.

A key component of education — the time and consideration a teacher takes to show a student how to improve her work — was entirely missing.

Then, one day, Najya proudly told her mother that her reading level had jumped three grades in one month.

Callous disregard, indeed.

Hannah-Jones argues that this sort of educational malpractice was possible because the student body in question was “mostly low-income Black children,” of whom little was expected. It’s hard to disagree.

None of this is news to parents in troubled school systems — and we are, in many cases, talking about systemic problems, especially in big-city school systems.

Nor is it a surprise that those middle-class families whom Hannah-Jones had noticed with reassurance when Najya was in pre-K had over time withdrawn

their kids from P.S. 307.

And yet the Hannah-Joneses stayed, to “fight for the students who did not have options.”

That decision and the family’s ensuing struggles, which Hannah-Jones bravely and unflinchingly related in her Times essay, have garnered a full spectrum of reactions from mockery to condemnation.

But the fact remains that sometimes our responsibilities to do what’s best for our children conflict with broader obligations to society, including to those who are less fortunate than our children, and however a parent decides to act can carry unfortunate consequences, including failure and regret.

By sticking her neck out and opening up a very touchy subject for examination, Hannah-Jones has done much more to advance the cause of public education than most of her detractors will give her credit for.

May we all match her humility and courage!

As another old slogan goes, it takes a village to raise a child. It takes good parents, too.

Email Clarence Page at cptimee@gmail.com.

Voice of the people

Businesses need these licenses

Across Chicago, many small businesses are struggling to stay afloat amid rising costs and razor-thin margins. In North Lawndale, this is especially true. While our neighborhood may receive less economic investment than others, our vibrant and dedicated business community continuously seeks opportunities to grow and improve. And in my role with the chamber, it is my responsibility to support these businesses with the tools they need to succeed.

When video gaming terminals (VGTs) were authorized by the Chicago City Council, local restaurants and bar owners were hopeful that these machines would generate much-needed supplemental revenue — funding that could support payroll, taxes and maintenance expenses, to name a few. However, the city has yet to issue these licenses to qualified establishments.

For neighborhood establishments in North Lawndale, this delay carries severe financial consequences. Many of these businesses are already facing significant financial stress, and this delay only worsens their predicament. VGTs would provide a crucial revenue stream, offering what we refer to as “economical gap insurance” to our businesses that would allow them to retain staff, cover rising costs and keep their doors open.

We urge the administration and the Department of Business Affairs and Consumer Protection to immediately lift the delay and begin issuing VGT licenses. The only entity benefiting from this block is a billion-dollar casino operator. So, let’s right this wrong, support our local small businesses and release these licenses today.

— Denita Sanders, president and CEO, Chi North Lawndale Chamber of Commerce

More gambling is no solution

Regarding the op-ed “If Chicago won’t act to allow video gaming, the state must step in” by state Sen. Willie Preston (Sept. 21): How fiscally responsible of a politician to essentially push for increased gambling, as taxpayers complain about budget issues. I don’t know whether I’m more concerned about gamblers not dealing with their own household budgets in the face of mounting addiction or the stewards of our government recommending gambling as a solution.

Yikes.

— Terence R. Kennedy, Hanover Park

Shortage of HRT medications

I recently spent most of the day on the phone calling several pharmacies trying to secure hormone replacement therapy (HRT/estrogen) medication. Everyone I spoke to at all the big-name pharmacies was helpful. They explained that there have been shortages of all forms of HRT (pills, patches, gels) for months. I understand that the demand for these products has increased since the Food and Drug Administration removed warnings associated with them.

I was required to have a telehealth visit with the nurse practitioner at my doctor’s office in order to discuss alternatives and find a product that may be in stock. I was able to secure some HRT at a pharmacy 10 miles from my home. I will be required to pay cash for it.

There are hundreds of thousands of women across the country who are going to have to go without these extremely helpful medications. We will suffer untold symptoms affiliated with perimenopause and menopause.

Something just doesn’t seem right about this situation. It seems

like they don’t want us middle-aged women to feel good.

— Jessica A. Gray, Chicago

International response to AI

Artificial intelligence is a global threat that is similar in scope and reach as climate change. While certain countries are more a source of the threat than others, the impact reaches everyone.

The United Nations formed a working group, the Intergovernmental Panel on Climate Change, that has contributors from many nations and has generated reports on causes, impact and needed responses. AI requires a similar approach.

Hoping our totally dysfunctional federal government will respond is an exercise in futility. All nations need to be involved to pressure the sources of the AI threat to act responsibly.

— Peter Gorr, Deer Park

Fulfilling Brickhouse’s dream

For decades, Jack Brickhouse was the television voice on WGN of our Chicago Cubs and White Sox. He retired in 1981. He also called Bears and Bulls games.

Prior to August 1988, Wrigley Field had no lights, and all Cubs home games were during the day. Brickhouse said he dreamed of calling a World Series between the Cubs and White Sox, which he hoped would go down to the seventh game. It would be played at Wrigley and go into extra innings but would be called on account of darkness. It would be his perfect ending.

It is possible that Brickhouse’s dream of an all-Chicago World Series may be achieved this year. However, since Wrigley has lights, it cannot end in a tie.

Whatever the outcome would be, the clear winner of a Chicago World Series would be the greatest sports town in the world.

— Sheldon I. Saitlin, Boca Raton, Florida

Mets fan rooting for the Sox

While I’m a New Yorker, my long-standing Mets fandom has extended to the White Sox this year — for similar reasons that drew me to the Mets in the 1960s.

Baseball is a metaphor for life and taught me that hope can still be found when things seem hopeless. Only two years ago, the Sox broke the record set by the Mets in 1962 for the most losses in the modern era. Now the Sox are in the playoffs.

Even if the Sox don’t reach the ultimate goal of a championship, 2026 will remain memorable. They are the first MLB team to reach the postseason after three straight seasons exceeding 100 losses. And what other franchise can claim the pope as one of their fans?

— Jeffrey B. Freedman, New York

What is actually forgiveness?

When we say we forgive someone, what exactly do we mean? Does forgiveness mean forgetting the offense as though it never happened? Does it mean choosing not to hold it against the other person? I suspect it means different things to different people. Are there wrongs that simply cannot be forgiven?

Christianity is deeply rooted in forgiveness. According to the Gospel of Luke, as Jesus hung on the cross, he prayed, “Father, forgive them, for they know not what they do.” Many Christians see that as the ultimate example of extending forgiveness even to those who offer no apology.

Speaking only for myself, I find

forgiveness a bit harder. Ignorance does not always excuse wrongdoing, and forgiveness is much easier when a sincere apology follows the offense.

People often say that holding a grudge burdens the one who carries it. There is truth in that. Yet without genuine remorse from the person who caused the harm, some wounds are extraordinarily difficult to release, no matter how much we wish we could.

So is forgiveness sometimes little more than lip service, a way of moving past a painful issue without actually letting it go? I can’t help but think, for many of us, it is.

— Scott T. Thompson, Bloomington, Indiana

Fall the return of an old buddy

I know the first day of autumn has only just arrived, but is it really too early to celebrate the most colorful season of all?

For one thing, we can now enjoy the great outdoors without fearing dehydration, sunburn and melanoma. What’s more, with the money we save on lotion and skin cream, we can now afford pumpkin spice lattes and cider doughnuts. How bad is that?

So, without a second thought, the time has come to put our warm weather clothing in mothballs and resurrect the flannel shirts and wool sweaters we unceremoniously laid to rest this past spring.

Autumn should be embraced much like an old buddy who’s returned for a brief visit. While there’s certain to be some changes, there’s also that familiar feeling of a lasting friendship.

— Bob Ory, Elgin

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Illustration: Dennis Yip

How Xi visit stabilises US-China relationship

Managed rivalry is not peace, it is a rules-based pause largely written by Beijing. The real test is whether Washington can live with a settlement it did not design

For all the solemnity of the B-2 flyover with four F-22 Raptors and a silent South Lawn drill, the real business of US President Donald Trump’s meeting with his Chinese counterpart Xi Jinping last week was narrower than the choreography. The Chinese readout reiterated the concept that should frame the relationship’s next phase: constructive strategic stability – cooperation as the primary track, competition kept within bounds, differences managed, conflict avoided.

Stripped of banquet rhetoric, the Washington leg of the 2026 Xi-Trump cycle cements a managed rivalry on Beijing’s terms: China sets the boundaries while Washington – constrained by rare earth dependence, market jitters and a crowded election calendar – accepts stabilisation over confrontation.

Trump called it a “great meeting” and revived the “friendship” trope; Xi was more doctrinal. Having previously raised the Thucydides Trap and asked if their countries could transcend a rising power-vs-hegemon collision, he announced last Thursday: “The Thucydides Trap can be overcome.” Competition, he said, “should be a race of catching up with one another, not a wrestle in which one either wins or loses”; it should be “healthy”, “kept within bounds”.

He also tied Trump’s “Make America great again” vision to China’s great national rejuvenation as complementary projects. The flattery is functional: it gives Trump a headline while embedding Chinese terms – strategic stability, bounded competition – into the public record.

Trade shows the asymmetry. A “new joint arrangement” and a two-month truce extension paper over May’s blueprint: a Board of Trade framework with US\$30 billion in reciprocal tariff cuts in principle, Chinese commitments to buy US soybeans and over US\$17 billion of farm products annually, as well as at least 200 Boeing aircraft on commercial terms – none of it fresh.

What has changed is leverage: China controls about 70 per cent of the world’s rare earth mining and 90 per cent of both the refining and separation as well as the magnet output. Last year’s export curbs and supply shocks explain why Trump made no new tariff threats. Trade stability is thus a Beijing-imposed limit on American coercion.

Artificial intelligence (AI) is the weakest point. Xi insists on “human control” and a people-centred approach; Trump pushes for

“superintelligence” deregulation. An AI dialogue has been set up and a notification mechanism proposed by the US.

The state dinner mirrored the gap: several CEOs from top US tech firms (Nvidia, Advanced Micro Devices, OpenAI, Google, Microsoft) attended but none from a Chinese AI company. Anthropic was conspicuously absent. China’s takeaway: talk to limit risk, but never let a divided US industry dictate AI governance.

The Taiwan issue followed the same pattern: maximum Chinese red-line language, minimum US concession. Xi urged Trump to oppose independence and handle the issue prudently. Washington has not formally moved from “does not support independence” to “oppose”, and that gap is deliberate.

“Xi’s call for regular military dialogue and crisis communication channels is the only concrete safeguard, and even that lacks a named working mechanism”

An US\$11.1 billion arms package to Taiwan was approved in December while a further record US\$14 billion sale in the pipeline has been held off; Trump called it a “very good negotiating chip”. Beijing treats any major arms sale to Taiwan as a provocation; Taipei’s push to lift defence spending to 5 per cent of gross domestic product by 2030 does not alter the calculus.

Xi’s call for regular military dialogue and crisis communication channels is the only concrete safeguard, and even that lacks a named working mechanism.

On Iran and the Strait of Hormuz, the summit produced symbolism, not settlement. Trump wants China, as Tehran’s largest trading partner, to pressure Iran and help reopen the strait; Xi reportedly offered support for a return to the short-lived June US-Iran deal, with no breakthrough

and no communicate language on navigation.

The Chinese readout briefly referred to “the situation in the Middle East”, reflecting Beijing’s preference to broker without joining a US-Israeli war that began in February and has kept energy markets tense since. It is a useful model for the rest of the Global South: China sells restraint and diplomatic cover without assuming military risk.

None of this impressed Washington’s critics. Senator Jeanne Shaheen and 18 Democrats called it “pageantry over purpose”; former State Department official Danny Russel dismissed it as “diplotainment” and noted: “Pandas are cute, but what America needs are rare earths.”

Republicans, including Roger Wicker, objected to honouring the Communist Party leadership; Rand Paul countered that “talk more, war less” is the point. The sniping confirms why a staged, low-substance summit suits Beijing: it lowers the chance of abrupt escalation while US politics fights over whether anything was conceded.

Soft power supplied the narrative glue. Beyond the red-decorated East Room and nod to the Nixon “Toast to Peace”, both sides traded historical props – mentions of WWII, ping-pong diplomacy and pandas, a bald eagle sculpture – to manufacture a sense of inevitability about the relationship. Friday’s Red Room tea and National Archives tour added a historic touch.

None of it commits either side, but it buys political cover: Trump gets a photo opportunity; Xi gets a civil farewell that masks the absence of a grand bargain. Read together, the visit shows a relationship stabilised on Chinese terms. Washington gets photographs, CEO access to Xi and a tariff truce that spares consumers before the midterm elections; Beijing gets recognition of bounded competition, a seat at the AI table and freedom to resist US demands on Taiwan, Iran and chip sovereignty.

Managed rivalry is not peace; it is a rules-based pause with Beijing largely writing the rules. The real test will be whether Washington can live with a settlement it did not design.

Wenran Jiang, the founding director of the China Institute and Mactaggart Research Chair Emeritus at the University of Alberta, is an adviser at the Institute for Peace and Diplomacy



Wenran Jiang

Why exposure of professor’s sexist views is a good thing

Student outrage over academic’s reductionist analysis of love and marriage welcome – better yet if it sparks a broader, needed debate

Love is a many-splendoured thing – except when seen through the lens of economists, apparently. Prominent economist Terence Chong Tai-leung, a Chinese University (CUHK) associate professor, confirmed this in an address last week to the institution’s New Asia College.



Alice Wu

In a speech titled “How to invest in your life?”, he basically told the female students at the event that they were wasting their time on academic achievements, since women must aim to marry for money. Don’t pursue a PhD, he said, as a woman’s youth is precious. Invest in your looks instead, he urged.

It’s no wonder backlash erupted. His speech was a slap in the face of the men and women who have been campaigning for gender equality and fighting the patriarchal stereotypes that hold women back.

In fact, Chong didn’t just direct his unwanted advice to young women. In one of the slides of his presentation, posted on social media by outraged attendees, he said it was pointless for “boys” to show “girls their study ability, academic grades or future ambitions. In fact, these things hold zero attraction for girls who are mature in their thinking.”

In response to the backlash, Chong offered a half-hearted apology of the “I’m sorry if you felt offended” variety. CUHK later sent Chong a reminder to mind his words.

Remember Standard Chartered global CEO Bill Winters’ apology over his “choice of words” in May, after he said artificial intelligence adoption at the bank would replace some “lower-value human capital” – 15 per cent of back-office staff – by 2030? Winters said afterwards that he valued all of his colleagues.

No surprise that “human capital” is an economic construct. If we can reduce people to their productive value, then reducing our life decisions to a cost-benefit analysis to maximise investment returns makes perfect sense.

“Human capital” became widely used after economists such as Nobel Prize winner Gary Becker popularised it. Interestingly, Becker’s views on love and marriage could be said to be a precursor to Chong’s jaw-dropping perspectives.

In his 1981 book, *A Treatise on the Family*, Becker analysed marriage from the standpoints of market equilibrium and utility maximisation, not love. He was not the first to view dating as transactional and a process marred by imperfect information and high transaction costs. But his thesis was criticised for presenting biases as neutral gender norms.

Chong appears to belong to that school of economics. Last week’s talk only touched on some of his thoughts. He, too, had written a book, first published in 2012, in which he elaborated at length on the cost-benefit analysis of women

marrying for money.

Some “gems” in the Chinese-language *The Alchemy of Life*, include his take on the “best strategy” for “high-quality wealthy men”, as reported by the Chinese press. Since these high-value men are aware that most women are in it for their money, their most economically rational strategy is to “simply enjoy a partner throwing herself at them without getting married”. They don’t even have to “grant” official status to these women, even if they have children together.

So we should not take Chong’s apology seriously. He believes in what he said, obviously. Chong said he had no intention of offending or targeting women, and was willing to apologise and revise the presentation if some of the expressions he used made people feel uncomfortable.

To that, we should say: no thanks. In fact, we should thank him instead for reminding us not to take dating advice from an economist.

The episode also brought home again the importance of remaining vigilant and pushing back on bias and prejudice wherever they’re found. It was good to see university students raising their voices against Chong’s remarks.

The human capacity for love should not be reduced to an analysis of diminishing returns. Such reductionist thinking may well convince people to open their hearts to love without all the theorising and calculations.

Or it may spark curiosity in some to learn more. If you are curious, don’t just seek out Chong’s book. Study Becker’s work, in which many of these ideas originate. Take on those who still subscribe to such sexist thinking.

This debate may be what we need to help our policymakers understand how to better encourage marriage and childbearing, for instance, instead of blaming high-achieving women for prioritising their careers and studies over marriage and family.

Alice Wu is a political consultant and a former associate director of the Asia Pacific Media Network at UCLA

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