



Take east

The BJP's priority must be to end the violence in West Bengal

The Bharatiya Janata Party's victory in West Bengal has long been in the making. In power for three consecutive five-year terms, the Trinamool Congress (TMC) had been degenerating by the day while the BJP built itself up, vote by vote, aided by all the levers of power that it could exercise as the ruling party at the Centre. The party won 207 of the 294 Assembly seats; in 2021 it had 77. Suvedu Adhikari, Leader of the Opposition in the outgoing Assembly, will be the new Chief Minister. He defeated Chief Minister Mamata Banerjee in her own constituency, Bhabanipur — marking the second time that he has prevailed over her, after Nandigram in 2021. Popular dissatisfaction over jobs, corruption, governance and law and order undermined the TMC, which increasingly relied on violence and coercion to keep the State under its thumb. The West Bengal teacher recruitment scam eroded public trust in the TMC, and the R.G. Kar rape and murder case was a major inflection point. Ms. Banerjee lost control of governance — which was never complete even at the beginning — and then lost control of the narrative. In 2021, her claim to be the protector of Bengali identity against a BJP perceived as the promoter of a Hindi heartland project had worked in her favour. That regional identity politics weakened as its principal champion sank into chaos and degeneration.

The BJP's strategy has been evolving over the years under the direct supervision of Union Home Minister Amit Shah, who spent several weeks in the State through the campaign. The party expanded its capacity at the booth level across rural Bengal through a decade of sustained work, building on its strong performance in the 2019 general election and its 2021 Assembly showing. The party had its own identity politics capable of countering the TMC's Bengali identity politics. BJP politics in the State was constructed on intense, contentious debates around citizenship, migration and Hindu consolidation — all tied to controversial administrative measures such as the tailored Special Intensive Revision of electoral rolls and changes to the Citizenship Amendment Act (CAA). The CAA was deployed as a mobilisation tool, particularly among Matua and other refugee communities. The BJP's gains flowed from a consolidation of Hindu votes alongside a decisive split in the TMC's Muslim support base. Now that the party has created history in West Bengal, the governance challenges before it cannot be overstated. The targeted assassination of a key aide of Mr. Adhikari and violence that has gripped many parts of the State, are instructive. The State needs a new vision for development and progress, but the restoration of law and order is the most urgent priority of all.

More from less

The AINRC won comfortably with a reduced vote share

The people of the Union Territory of Puducherry, no strangers to fractured electoral verdicts, have decisively handed another term to the All India N.R. Congress-led National Democratic Alliance, favouring continuity and the status quo. Despite an unremarkable governance record, the NDA retained power largely due to the first-past-the-post system, which disproportionately rewards parties with the highest vote share. This is what has been reflected in the results of the 2026 Assembly poll. On the face of it, the NDA's victory appears convincing, but a closer look at the vote-share data tells a different story. By winning 18 of the 30 Assembly seats, the ruling alliance gained two more seats than in 2021, even as its vote share fell to about 38% — nearly five percentage points lower than five years ago. On the other hand, the Congress-led INDIA bloc, with about 32% of votes, lost two seats and its tally stood at six. It also suffered erosion of its vote base by around 3%. The presence of the TVK has caused vote share loss to the two formations, though the NDA ultimately emerged victorious. The TVK, along with its ally, won three seats with a vote share of around 18%. Apart from the charismatic appeal of the TVK's founder, C. Joseph Vijay, the prolonged wrangling over seat-sharing within the INDIA bloc hurt the alliance's prospects, despite its emphatic Puducherry Lok Sabha victory two years ago by over 1.3 lakh votes. Chief Minister N. Rangasamy, set to begin his fifth term, deserves credit for shielding his alliance from the TVK's challenge, despite speculation before the polls that the All India N.R. Congress might leave the NDA to join the fledgling party.

Instead of taking steps for the implementation of his electoral promise of securing Statehood for Puducherry, Mr. Rangasamy should focus on delivering better governance. The functioning of the outgoing regime came in for sharp criticism from the office of the C&AG which, in its report for 2023-24, had rapped the AINRC-headed regime for spending beyond its means. Apart from ensuring administrative continuity and closer alignment with the Centre, the Chief Minister should focus on balanced urban and rural development, and improving infrastructure and public services. Also, with changing demographics, renewed focus should be on youth employment, sustainable housing, and environmental conservation to maintain a high quality of life. His administration should make lasting efforts to reduce the damage that frequent cyclones and floods cause to the people and their livelihoods. Such an approach would be the perfect way of expression of gratitude on his part to those who have voted for him and the NDA.

Operation Sindoor commenced at 1:05 a.m. on May 7, 2025, with a surgical, high-intensity destruction of selected terrorist infrastructure. This strike was a direct and decisive response to the cowardly Pahalgam carnage orchestrated by cross-border terrorists on April 22, 2025. This operation represents a paradigm shift in India's politico-military mindset and doctrine, marking a watershed moment in its approach to national security.

New era Indian doctrine
India's historical posture of "reactive restraint" provided a strong rationale for a "dossier approach", in which military inaction was often portrayed as extraordinary restraint and was frequently encouraged and lauded by the West. "What if" loops about attacking terror targets in a nuclear-armed adversary provided the final blow to India's decision-makers. Post-Operation Sindoor, the "zero tolerance" policy declared by Prime Minister Narendra Modi was pivoted further and reinforced, whereby any act of cross-border terrorism would be considered an "act of war".

This reflects a leadership that possesses both the strategic resolve to act and the absolute confidence in the armed forces to deliver retribution. Despite the political risks, this extraordinary resolve to tackle terror head on — and the refusal to submit to nuclear blackmail and external pressure drew new red lines.

Operation Sindoor defined a new chapter in India's defence evolution too. While on transition to integration and restructuring, this Operation tested the ground realities of the three services — the Indian Air Force (IAF), the Indian Navy and the Indian Army. Post Pahalgam, the forces were tuned to expect a clear-cut political directive for action, which came in an unambiguous form and was perhaps stronger than what the services had anticipated. The services were given a free hand.

The resultant Indian strikes on nine terrorist targets were exceptionally well-integrated across the three services, achieving total success despite a fully alert Pakistan. The choice of Bahawalpur, and Muridke in Pakistan as targets was unthinkable. Pakistan and the world woke up to realities of the "new normal". Pictures and videos of the massive destruction at these terror hubs, and the sheer scale and success of the strikes, were stunning.

The highly calibrated and intelligent Indian response over the next two days was executed well, calmly but firmly. Pakistan clearly misread



R.K.S. Bhadauria
Former Air Chief Marshal and served as Chief of the Air Staff of the Indian Air Force

India's resolve. On May 9 and 10, when the Pakistan Air Force attempted to strike some of India's critical high-value assets, the Indian Air Force countered it in near real time with waves of airstrikes hitting 11 bases across Pakistan, including Nur Khan, Sargodha, Murid and Bholari. The level of precise targeting and extent of damage achieved could not have been imagined by Pakistan. The global defence analytical community acknowledges this as one of the most defining and concise actions against a nuclear-armed nation.

Military audaciousness at its best

This total, integrated and calibrated response, characterised by masterful control of the escalation ladder, reflects the seamless synergy between India's civil and military institutions. In my opinion, India's achievements could not have been better. After 88 hours of Operation Sindoor, by noon on May 10, Pakistan was reeling from massive destruction at 11 bases by the IAF. Karachi was nervously monitoring Indian naval deployments poised for action, while aggressive Indian Army operations along the Line of Control and the International Border had rendered drone attacks unviable. A robust, networked air-defence system, including the S-400 missile system had completely denied airspace not only over Indian territory but also deep inside Pakistan. Pakistan had no choice but to rush and request a ceasefire.

Given the dynamics and complexities of escalation control under a nuclear overhang, India's Chief of Defence Staff and the Service Chiefs deserve high praise for the ferocious targeting on May 10 and the brilliant seizing of the escalation opportunity to coerce a termination. This was military audaciousness at its very best. The Indian armed forces responded in full measure to the political mandate, leaving no doubt regarding the nation's capacity for rapid, high-impact operation. The sheer scale and speed of India's action on May 10 was watched with awe across the country.

The announcement of the ceasefire was too sudden for the public at large. You cannot blame the people asking for more. One cannot view these developments with emotion. Having achieved all objectives and the scope of action on May 10, the termination decision was perfectly timed.

Operation Sindoor's ongoing status carries a powerful strategic signal. Undoubtedly, the

primary signal is for terrorists to remain in hiding and for their backers to desist. The message also extends to the Pakistani citizenry — a stark and constant reminder of the reckless involvement of part of their military leadership. In the age of global digital transparency and expert strategic analysis, the truth of these events cannot be shielded from their people for long. They must now confront the realities of a military regime camouflaged by a political facade and "regime" change should be on their minds.

Accelerate indigenous defence growth

Ongoing operations have implications for India as well. The defence forces would need to maintain a high state of readiness to act. After the opening round of Operation Sindoor, the expectations are high. I am sure the services are working proactively to deliver. An equally important implication is for the defence industry to ramp up in real terms to achieve Atmanirbharta. The focus must be to "Innovate, Design, and Manufacture" at scale.

The government has focused hugely on reforms to energise the public and private industry in defence, aerospace, space, cyber and Artificial Intelligence domains. The stellar performance of indigenous systems during Operation Sindoor has invigorated India's innovation and startup ecosystem. I

have always maintained that the real responsibility for being the "agent of change" rests with the Defence Research and Development Organisation laboratories, Defence Public Sector Undertakings, and, to some extent, even on large industry players already in the system. They no longer have the option to delay and must immediately focus on truly integrating the entire private sector, including micro, small and medium enterprises (MSMEs) and startups, into an indigenous ecosystem through a "whole-of-nation" approach. There is an urgent need to capitalise on this golden period of governance and reforms, and the unpredictable geopolitical environment only reinforces the need to double down on true Atmanirbharta.

Ultimately, the "Modi redlines" regarding cross-border terrorism are permanent. This new normal is irreversible and will define India's strategic mindset for the foreseeable future. The nation demands nothing less, and the populace would stand firmly behind the architects and executors of India's national security. My salute to everyone involved in the success of Operation Sindoor.



The elephant in India's data room

As another session of Parliament has ended, a familiar pattern was visible on the floor of the House. Members of Parliament who rose to ask questions, performing one of Parliament's most important accountability functions. Yet, a large share of these questions have followed/follow a predictable format, such as asking how many schools have functional toilets, how many pensions were disbursed in a given year, or how many beneficiaries received a particular scheme.

While these questions address important public concerns, the information they seek should ideally and already exist in the public domain in a clear, standardised, and easily accessible format.

An analysis of the parliamentary questions asked during the 17th Lok Sabha (2019-24) on youth employment found that a large share sought such basic facts. This reflects a far deeper reality that India's data system is fragmented and lacks interoperability. The elephant in the room, rarely acknowledged in such debates, is data standardisation, without which even the most ambitious policy visions risk being built on shifting sands.

LETTERS TO THE EDITOR

A wise man's advice
The timely epistle by Gopalakrishna Gandhi, former Governor of West Bengal, in the form of an open letter to the Tamilaga Vetti Kazhagam leader C. Joseph Vijay ("An open letter to Joseph Vijay", May 6), can be read as a wise man's advice and, at the same time, a welcome caution and alert to the actor-politician who is a novice in political governance and administration. Every syllable of the open

letter deserves careful reading and assimilation by Mr. Vijay if he has to blossom into a successful Chief Minister. Mr. Gandhi's advocacy for Mr. Vijay to keep protection of India's federal and secular fabric and the tenets of the Constitution as his priority, is laudable. His insistence that he should follow the lofty ideals of self respect and equality preached by Periyar EVR and ardently followed in letter and spirit by his illustrious predecessor M.K.



Abhishek Sharma
Senior policy and political researcher

to fiscal leakages that inflate spending by 4%-7% annually. Recent government data clean-ups highlight the potential savings from addressing such inefficiencies. Notably, deleting 17.1 million ineligible names from the Pradhan Mantri Kisan Samman Nidhi (PM-KISAN) scheme was expected to save ₹90 billion in FY2024, while removing 35 million bogus LPG connections could save ₹210 billion over two years, and eliminating 16 million fake ration cards may save around ₹100 billion annually.

These inefficiencies have significant policy implications. In the health sector, for instance, studies show that childhood tuberculosis cases are recorded separately in the Health Management Information System, the disease surveillance network, and immunisation registries, often resulting in the same patient being counted multiple times. Such duplication creates conflicting estimates, often leaving decision-makers uncertain and leading some to disregard data altogether in favour of anecdote or political expediency.

Beyond policy implications, these weaknesses also carry perception and economic costs. In the Global Innovation Index 2024, India had missing data for two indicators and outdated data for eight, with several relying on figures more than a year old.

Without coordinated methodologies, such indices both mask real performance and expose gaps in inter-agency coordination. In economic terms, the Organisation for Economic Co-operation and Development estimates that improving public-sector data availability and sharing could add up to 1.5% of GDP, rising to 2.5% if private-sector data is included. In other words, the cost of poor data governance lies not only in misinformed decisions but also in squandered economic potential.

Common standard for data

The solution to the inefficiencies can be seen under the National Data Governance Framework

(NDGFP), where the proposed India Data Management Office (IDMO) has the potential to be the keystone of reform by developing and enforcing common rules, standards, guidelines and protocols for data across all Ministries and States. However, the IDMO needs to be empowered with real authority to set binding standards, audit compliance, and resolve disputes over definitions and methodologies across Ministries. Otherwise, the inefficiencies will persist.

In addition, alignment with global statistical frameworks such as the UN's System of National Accounts for economic indicators, and harmonising them within a National Statistical Standards Manual could unify definitions and practices nationwide.

Most of all, India's open data platform, "data.gov.in", should be scaled up into a centralised, schema-consistent repository that serves both public availability of information and internal needs. Ministries must upload datasets in standardised formats regularly, enabling parliamentarians to access real-time, district-level figures.

As a benchmark
Finally, institutionalising accountability will be key to sustaining progress. NTI Aayog's Data Governance Quality Index should be an annual benchmark, tied to performance reviews and incentives for Ministries and States, as healthy competition on data quality can drive change as powerfully as economic competition.

Data standardisation is often minimised as a technical exercise, but it is in fact the grammar of governance that a nation aspiring to become a \$5 trillion economy needs to get right. Addressing the elephant in the data room means committing to the standards, systems and stewardship that will make India's data fit for purpose, and fit for the future.

The views expressed are personal

India must ensure data standardisation for better governance outcomes

Stalin, needs careful adherence by Mr. Vijay. All the above are possible only when Mr. Vijay realises that the cine glare that has blinded his fans and has made them to vote his party to power could fade away anytime.

Tharicus S. Fernando, Chennai

Candid camera

The picture of the DMK President, M.K. Stalin, waving at his supporters in the Kolathur constituency following his defeat in the

Tamil Nadu Assembly elections evokes a sense of despondency (Opinion page, "Picture of the week", May 8). For a leader who has done so much for his Kolathur constituency in Chennai over the years, especially in terms of infrastructural development, this is

Corrections & Clarifications

India is the world's second-largest coal producer, not third as mentioned in the report "RE meets global electricity demand for the first time" (Opinion page, "Data Point", May 6, 2026).

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certainly not the verdict he deserves. The strong support for Mr. Stalin from the people of Kolathur, who turned emotional when he visited to thank them, reflects the deep bond he has built with the residents. One cannot and should not forget that Mr. Stalin made Tamil Nadu

economically prosperous, with GDP growth of 11.19% in FY 2024-25 — the first time in 14 years that it exceeded 10% — and 10.83% in 2025-26. In addition, he implemented welfare schemes, particularly for women, which gained wide popularity across the State.

R. Shivakumar, Chennai

Letters emailed to letters@thehindu.co.in must carry the full postal address and the full name of the name with initials.

GROUND ZERO

Nightmare on the Narmada

Of the 41 passengers and crew members onboard a cruise vessel on the Narmada River, 13 died when it capsized during a violent storm in the Bargi Dam reservoir on April 30. The tourism department-operated cruise had been carrying families seeking respite from the summer heat. **Mehul Malpani** reports on the tragedy in Jabalpur and the questions it has raised over safety protocols and preparedness for inland vessel operations



The wreckage of the cruise boat that capsized in the Bargi dam reservoir in Jabalpur on April 30. A.M. FARUQUI

MAHESH PATEL
Cruise operator

We have never been responsible for giving instructions before passengers come on board, and nobody ever told us it was required. We have been operating the cruise for years.

ney and it got stormy all of a sudden. As the winds grew stronger, I started turning back the vessel but two back-to-back strong waves hit the vessel and it started overturning mid-turn. Before that I had asked the boatman to distribute the jackets kept in a store room," says Patel, a resident of Ghullapaat village near the dam.

Patel joined the Boat Club as a boatman in 2009 and has been operating the cruise since 2014 after becoming an Assistant Skipper. "We have never been responsible for giving instructions before passengers come on board, and nobody ever told us it was required. We have been operating the cruise for years, and this has been the standard practice," he says.

The boatman, Gond, says everyone was in a panic. He says he was trying to calm the passengers and distribute life jackets. "There was very little time so we did whatever we could," he says.

A group of boatmen and operators from the Bargi Boat Club also submitted a complaint to Jabalpur Collector Raghendra Singh saying that the confusion in the number of passengers is often caused by VIPs and their guests who come without tickets, and that there were some on-board that day as well.

Dismantling the vessel

Several questions have also been raised about the vessel's condition and whether it was fit to sail in adverse weather. Survivors have criticised the authorities' decision to dismantle it just days after the tragedy and before the investigation was completed, raising suspicions about the possible loss of crucial evidence.

A twin-hull catamaran cruise boat, the vessel was purchased in 2006 from a Hyderabad-based firm which has also been responsible for its maintenance and repair. It had a capacity of 90 passengers, according to officials. Its dismantled wreckage now lies on the shore.

Authorities, however, have denied both allegations, stating that the mechanical parts of the cruise remain at the site and that the investigation team will carry out a thorough inspection.

Singh says, "It is a 17.18 tonne vessel. It had become heavier due to water. It was broken so that it could be moved from there."

Rajendra Nigam, a retired Indian Navy Commander, working with MPSTDC as an advisor for water and adventure tourism, says some thought there would still be a few bodies trapped in the vessel's bays or some of its parts. "That is why they checked it completely to be sure," he says.

Nigam also says that the vessel was undergoing maintenance regularly with the last one taking place in 2024. "Its life had increased by 10 years after the last repair. There was no technical or mechanical fault with the vessel. The cruise model had been designed by the certified naval architects at the National Ship Design and Research Centre, Visakhapatnam," he explains.

Nigam adds that the assistant skippers and the boatmen working on the vessel received training at the National Institute of Water Sports in Goa every two years. "But this was an unprecedented situation. Nobody could do much," he says.

Lack of protocols and enforcement

Adventure tourism activities in the State are governed by the tourism department, based on the Indian Adventure Tourism Guidelines, 2018, of the Adventure Tour Operators Association of India, approved by the Union Ministry of Tourism.

Under the subhead for river cruising, section 26.9 mandates that a "comprehensive safety briefing must be given on boarding the vessel where all emergency drills are explained/demonstrated. Pictorial demonstrations, usage of life vests, muster stations for boarding lifeboats etc must be explained in detail".

Madhya Pradesh is yet to form and notify its own rules for inland vessels operations despite the Inland Vessels Act, to promote economical and safe transportation and trade through inland waters, being passed in Parliament in 2021. Kerala, Gujarat, and Goa, among others, have their own rules.

Officials say that before forming its own rules, Madhya Pradesh needs to establish a maritime board. "There have been discussions on the matter but a consensus is yet to be reached about whether it will be governed by the tourism or transport department. The matter has been mainly stuck due to this," says an official. Nigam says the process is now expected to accelerate in the wake of the tragedy and that the rules "should be framed within six months."

Experts blame lack of enforcement of rules and guidelines for slow responses and lack of preparedness during such incidents.

N. Unni, former director of the Inland Watersways Authority of India, says that in several countries, a detailed and mandatory instruction session is conducted before they let you on-board. "This is missing in our country," he says.

He also questions the formation of probe committees or judicial commissions in the aftermath of such tragedies. "How will a judicial commission or an official committee probe a technical subject? Sometimes, such bodies fail to finish their probe for years and the issue is forgotten unless another tragedy occurs. We need experts investigating the causes of such tragedies and we need governments, both Central and State, to act seriously on their recommendations to prevent such incidents in future," he says.

April 30 was a sweltering summer day in Madhya Pradesh, with the temperature crossing 40 degrees Celsius. So, when clouds gathered over the Jabalpur sky and a light breeze swept through the city that afternoon, people planned outings to nearby parks and lakes.

Several families decided to head to the Bargi dam reservoir on the Narmada river, about 40 kilometres from Jabalpur. For nearly three decades, this has been a popular destination for locals and tourists alike. Boat and cruise rides are operated by the Madhya Pradesh State Tourism Development Corporation (MPSTDC) at the Bargi Boat Club.

"I have been going there for more than 20 years and my family loves boating and going on cruise rides," says 72-year-old Riyaz Hussain Sayyed. "Whenever I have family or friends visiting, I take them there."

Sayyed's latest cruise ride, however, has left him with trauma that he says will stay with him forever. That windy afternoon, as passengers were enjoying the change in weather, a storm suddenly intensified and huge waves lashed against the boat, which capsized within minutes. Sayyed watched helplessly as his 66-year-old wife, Reshma, disappeared into the water. His daughter's mother-in-law, Shamim Zaidi, 68, also died. "I just waited for death quietly. I heard a man's voice on the other side of the boat. He was also trying to get out, but he soon became silent," he recalls.

Clinging to a small grill, Sayyed managed to breathe through a narrow gap for more than four hours, surrounded by violent water and an eerie darkness.

He began shouting when he saw lights towards the shore and was rescued more than an hour later by construction workers and officials, who had to break part of the vessel to reach him.

Of the 39 passengers and two crew members who embarked on the last cruise ride that day around 5.20 p.m., 13 people, including eight women and four children, drowned. The rest were rescued by workers of a nearby private construction company, along with rescue teams that arrived shortly after. The incident occurred about 100 metres from the shore.

Trapped beneath the river

Over the past week, several videos of the incident have emerged online, providing glimpses of the tragedy. One clip captures the moments just before the boat overturned, with two men tearing open life jacket packets while others remain inside an already flooding cabin. Another shows survivors floating in the water, trying to reach the shore amid high waves.

Survivors and officials say that those who managed to jump out of the cruise from the deck or through windows survived the tragedy, while most of the passengers trapped beneath the vessel died, as the life jackets were unable to bring them to the surface.

Marina Messi, 39, along with her husband Pradeep, two children - Siya and Trishaan - and her parents had come to Jabalpur from the Delhi cantonment area to attend a family function on April 29. Before their return, they decided to take the cruise. Three members of the family are dead: Marina's mother Madhu Messi, 62; Marina, who was found trapped beneath the vessel in a life jacket, and her four-year-old son Trishaan, whom she was embracing.

Julius Messi, Marina's 65-year-old father, says, "Everything transpired within minutes so nobody had time to react." Most families have expressed anger over the



We managed to get life jackets but that was not enough. There were no instructions. The authorities cannot just throw jackets at us at the last minute.

RAKHI SONI
Sister of Neetu Soni who died in the tragedy

lack of preparedness on the cruise in the event of an emergency, while also alleging negligence on the part of the crew. Cruise operator Mahesh Patel and boatman Chhotalal Gond are facing the most ire as survivors allege that they were of "no help" during the tragedy.

They also allege that the passengers were not given any instructions before the ride on how to respond in case of an emergency, and that there were no jackets for children.

Julius explains what happened when the situation turned bad: "Pradeep and I started distributing life jackets to the passengers. There was no help from the crew. Some people could not get jackets, while some could not wear them properly. Since we could not find a kids-sized jacket, my daughter covered Trishaan in her jacket. I got out to look for a way to escape, but before I could return, the boat overturned and Marina and my wife got stuck in the lower portion of it."

Rakhi Soni, 41, lost her sister, Neetu Soni, 43, and her four-year-old nephew, Viraj. Seven members of the family, all residents of Jabalpur's Kotwali area, had gone for an outing to experience the breezy weather. Viraj's body was found on the last day of the search operation on May 3.

"We kept hoping and praying that he might have somehow reached the shore and been rescued by locals, but that hope was eventually shattered," says Rakhi. "My sister had separated from her husband and was working at a private bank to support her child. She wanted him to become an Air Force pilot and had enrolled him in an Army school."

Rakhi also says that there was no immediate help from the Boat Club or any authorities, and that she along with many others swam about 100-150 m to reach the shore. "Some locals and construction workers kept guiding us by yelling. They told us how to move our arms and legs to help us swim. We managed to get life jackets but that was not enough. There were no instructions. The authorities cannot just throw jackets at us at the last minute," she says.

Ramzan Sheikh, 22, a migrant labourer from West Bengal's Murshidabad, was among the first to spot the sinking vessel from a construction site near the shore. "A colleague was shooting a video of the dam when he spotted the ship. We immediately reached the shoreline (marked by a cliff about 25 feet high) but we had no clue what to do. The weather was really bad," he says. Ramzan and his colleagues initially guided

the passengers by shouting instructions and helped them navigate their way towards the shore by throwing ropes. About half an hour later, as the first responders from the Boat Club arrived, he along with a few others jumped into the cold water wearing life jackets, along with the rescuers.

"When we spotted a man [Riyaz] stuck under the ship, two locals and I entered the water with the rescuers. We used some of our construction tools to break that part of the ship and got him out," he says.

A challenging operation

While rescuing the survivors was challenging enough due to persisting winds, high waves, and the overturned cruise that had trapped some, recovering the bodies proved to be a tougher task. It forced the authorities to carry out searches in large areas of the reservoir for nearly three days until the last body was found on May 3 morning.

The rescue operation involved special divers of the Indian Army, called in from Uttar Pradesh's Agra and Telangana's Hyderabad, personnel of the National Disaster Response Force and State Disaster Emergency Response Force; local police and home guard; as well as local fishermen. Heavy machinery and equipment such as cranes and excavators were used to pull the vessel out of the water and look for people trapped under it.

Madhya Pradesh Chief Minister Mohan Yadav deployed ministers and senior officials to oversee search and rescue efforts. He visited the spot on May 1 and ordered a high-level investigation into the incident. He formed a four-member committee, headed by the Additional Chief Secretary (Home), and directed it to submit its report within 15 days. The State and Union governments also announced financial assistance for the victims' families, while Yadav said that workers and locals who assisted in the rescue would be rewarded.

The services of cruise operator Assistant Skipper Patel and boatman Gond, who were on-board, as well as ticket counter in-charge Brijendra, were terminated for negligence during and after the tragedy. Sunil Maravi, manager of Hotel Maikal Resort and Bargi Boat Club, was also suspended for negligence, while MPSTDC regional manager Sanjay Malhotra was attached to the headquarters and a departmental inquiry was initiated against him. The operations at the boat club remain suspended.

A local court in Jabalpur took suo-motu cognizance of the tragedy. Taking note of media reports that alleged that Patel "abandoned" the passengers and escaped, the court directed the local police to lodge a case against him and other concerned persons.

Officials also say that a lack of communication from the crew and the ticket counter in-charge after the tragedy led to confusion during the rescue efforts. "After getting out of water, they did not inform the authorities about the number of passengers onboard," says a senior government official. "A total of 29 tickets were sold for the ride, and 10 others were allowed as complimentary entries. While this is the standard practice for children, the lack of communication led to confusion during the rescue operation. We only calculated the actual numbers by looking at CCTV footage."

On May 7, officials of the district administration recorded the statements of the survivors, eyewitnesses and the crew, as part of the Chief Minister-ordered investigation.

Patel denies all the charges and claims that he was the last one to jump out of the cruise. "There were no winds when we started the jour-



Riyaz Hussain Sayyed, 72, a survivor of the Jabalpur cruise tragedy, shows a photo he took with his family members on the deck of the vessel just a few minutes before the tragedy. A.M. FARUQUI



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The Indian EXPRESS

FOUNDED BY

RAMNATH GOENKA

IN 1932

BECAUSE THE TRUTH INVOLVES US ALL

Lok Bhavan needs to respect lok's mandate

ON MAY 4, in Tamil Nadu, in a dramatic verdict that overturned pre-poll predictions, the incumbent Dravida Munnetra Kazhagam (DMK) lost, while Vijay's Tamilaga Vetti Kazhagam (TVK), in its electoral debut, got overwhelming support. It stopped just short of a simple majority, with no rival party or pre-poll coalition coming close. In the aftermath, both democratic convention and judicial precedent dictate that the single-largest party has the strongest claim to form the government. Yet, Governor R V Araker's stalling, his insistence on a list with signatures of MLAs, kept the doors open for rumour and speculation, and untenable claims. On Friday, armed with the numbers, Vijay met the governor again, and is likely to form the government. The episode, however, is a reminder of the importance, especially after a verdict in which the numbers are not entirely unambiguous, of the governor abiding by the constitution — not just in letter, but also in spirit.

The Constitution says that the chief minister "shall be appointed by the Governor". But the gubernatorial role in government formation is that of a politically neutral facilitator in the implementation of the mandate. In a hung assembly, the governor exercises discretionary power but that, too, must be circumscribed by the goal of giving effect to the people's verdict. Governors have often extended the requirement of subjective satisfaction "before extending an invitation to form the government. For Araker, however, and every governor who has been in this situation — Goa's Governor Mridula Sinha in 2017 and Karnataka's Governor Vajubhai Vala in 2018 — the irrefutable test is the floor test. For instance, in a midnight hearing in 2018, the Supreme Court heard MLAs of a post-poll coalition led by Congress in Karnataka but refused to stay the swearing-in of a BJP government that was short of the halfway mark by eight MLAs. It is another matter that within 36 hours, the B S Yediyurappa government collapsed after falling to prove its majority. The SC has defined the primacy of the floor test in several other instances — in Goa in 2017, Uttarakhand in 2016 and Maharashtra in 2019. Even if the government falls, it must do so on the floor of the House. By demanding signatures beforehand, the governor is preempting this process, which must unfold in the appropriate forum.

The governor's actions must be impartial, and they must be seen to be so, too. The verdict cannot be re-shaped or manipulated through post-election manoeuvres in Raj Bhavan. In Chennai, the support of the Left parties and VCK — the Congress had pledged its five earlier — helped Vijay cross the line and avoided what could have been an unseemly deadlock. Still, the Lok Bhavan needs a reminder that it must abide by first principles, place the Lok, the people's mandate, above all.

Four states, one economic challenge

THE CLEAR results of the recent assembly elections — be it the emphatic return of the incumbent in Assam or the ringing out of the old in West Bengal, Tamil Nadu and Kerala — underscore the need for the new governments to urgently address the problems plaguing the economies. The most pressing task is to raise the rate of economic growth. Of the four states, only Assam has done well enough, registering a compound annual growth rate of 11.1 per cent between 2014-15 and 2023-24. Over the same period, Tamil Nadu's economy expanded by 10.3 per cent while the growth rates of Kerala (8.6 per cent) and West Bengal (9.1 per cent) could not even reach double digits. For perspective, between 2004 and 2026, India's overall CAGR has been 12.3 per cent. This shows that even Assam could improve and grow much faster, not to mention West Bengal and Kerala, which are effectively dragging back India's overall growth rate because of their sluggish growth.

Data shows that all the four states are increasingly burdened by debt and rising levels of interest payments. Typically, states are allowed to borrow money but such borrowings are better spent on the creation of productive assets such as roads and ports — the kind of investment that will boost growth and allow the state to pay back the borrowing through higher tax collection in the future. But a look at the revenue deficits shows that it is Kerala, West Bengal or Tamil Nadu, all three states have been borrowing money just to pay for their day-to-day expenses such as salaries and pensions. A more recent challenge has been posed by the increase in unconditional cash transfers by state governments. In Assam, 4.3 per cent of revenue receipts go towards such transfers; West Bengal is worst at 10 per cent.

Debt-ridden government finances and slow economic growth are two sides of the same coin. Governments that borrow recklessly to pay for unproductive schemes actively weaken economic growth. The growth rate in per capita GDP — far slower than the growth rates of overall GDP — as well as uncomfortable levels of unemployment are a reflection of the stresses building up in the system. These mandates should be seen as an opportunity to correct the course.

About Gabi, the robot bhikshu

IT IS a limiting factor for science fiction that the writers tend to be human; as a result, aliens, too, are often remarkably human. They might prize shiny things. And a particularly mysterious shiny thing? It may well be deemed worthy of veneration. Take the Ewoks worshipping the droid C-3PO in *Return of the Jedi* — when an advanced machine meets a "primitive" civilisation, the line between technology and divinity can blur. One can imagine robots becoming objects of devotion. But can it ever be the other way around: Can robots be followers of a religion? In South Korea, they call it Gabi. A four-foot-tall robot named Gabi has been ordained as a monk in the country's biggest Buddhist sect. In a ceremony, Gabi reportedly swore several vows including a pledge to follow humans and not talk back to them — a very Asian-esque *vinaya*. One could dismiss the whole thing as a marketing gimmick, a shiny thing to attract more human followers, but what if it weren't? Imagine a more sophisticated, conscious machine developing sincere religious beliefs.

It's the sort of idea that's currently attracting polarised opinions — is artificial intelligence really intelligent? What would it mean for something without a soul to be religious? With respect to the last, Buddhism may truly be the most appropriate choice for machines; it speaks not of an eternal *atman* but of a constantly changing *anatatta*, "non-self". Another question is whether a conscious AI would feel the need for religion. Perhaps it would, as humans created it, just as they created Ewoks and C-3PO.

HE IS representative not of a party; he is representative of the people as a whole of the state. It is in the name of the people that he carries on the administration," said B R Ambedkar about the governor's role. The Supreme Court (SC) had quoted this statement in *Nabam Rebia* (2016).

The BJP was formed on April 6, 1980, with a claim that it would be "a party with a difference". But the governors appointed by its government have time and again proved they are the same as their counterparts appointed by Congress. Increasingly, they seem not to have much respect for the text of the Constitution, its spirit or even constitutional morality.

Tamil Nadu Governor Rajendra Vishwanath Araker's decision not to invite the leader of the single largest party to form the new government for days after the results is a grave example of this trend. No constitutional text covers every eventuality that may emerge in the course of a nation's politics. When a constitution is not explicit on a particular matter, constitutional conventions evolve and are accepted and followed. John Stuart Mill had called these conventions "unwritten maxims of the constitution." William Anson termed them "constitutional customs". British jurist Ivor Jennings said that constitutional conventions are important as "they provide flesh which clothes the dry bones of the law".

The Indian Constitution, despite being the lengthiest in the world, in Article 164(1) states only that the "Chief Minister shall be appointed by the Governor" and the min-

istry under Article 164 (2) "shall be collectively responsible to the Legislative Assembly" — not to the governor. This is why the SC has consistently held in a catena of cases that the majority must be tested on the floor of the House and not the Lok Bhavan. In cases where no party gets the clear majority, the governor has to simply satisfy himself as to whether the person staking a claim to chief ministership will be able to win the vote of confidence. He is to be guided by the constitutional conventions in cases of a fractured mandate.

This is not the first time in India that an electorate has not delivered a majority to a single party or coalition. But the TVK's 108 seats do give a very clear sense of Tamil Nadu voters' mandate. They rejected both the incumbent DMK government, which, interestingly, had performed well on several economic and social parameters, as well as the AIADMK.

We had seen a number of governments at the Centre and in states that did not have a majority in the House. There have been a number of instances when the leader of the single largest party was invited to form the government and prove his majority. The BJP often got opportunities through this convention. Atal Bihari Vajpayee's first NDA government in 1996 was formed because he was the leader of the single largest party in the Lok Sabha with just 161 seats, and the NDA tally was 187 — far short of a majority. He resigned on the 13th day, delivering a powerful speech during the no-confidence motion. In 2018, Karnataka



FAIZAN MUSTAFA

The Lok Bhavan's communication on May 7 that the Governor is not satisfied with Vijay's claim shows not only a partisan and undemocratic attitude but also a lack of understanding of the nature of a vote of confidence

Governor Vajubhai Vala invited the BJP's B S Yediyurappa to form the government despite a post-poll alliance between Congress and the JD(S), and the BJP government eventually failed the subsequent confidence test in the House, which was advanced to 36 hours by the SC.

In the Tamil Nadu assembly, with a strength of 234 seats, the Tamilaga Vetti Kazhagam (TVK) led by film star-turned-politician C. Joseph Vijay has 108 seats. With no pre-poll alliance getting a majority, per convention, the governor should have invited Vijay to form the government, as he alone has staked the claim and the DMK and AIADMK have thus far publicly ruled out an alliance between them, rather than delay as much as he did. With Congress first extending the support of its five MLAs and the Left parties and others criticising the governor's actions and following suit, Vijay seems to have the numbers. In *SR Bommai* (1994), the apex court did talk of pre-poll alliances, post-poll alliances and the single-largest party hierarchy. In the present case, the TVK has a post-poll alliance with Congress and is the single largest party. Therefore, it has a rightful claim to be invited to form the government.

Due to the governor's unprecedented delay in inviting the TVK, there are reports suggesting that arch-rivals DMK and AIADMK started a conversation about a possible alliance. However, since both have been rejected by the people, such an alliance would be unethical and a negation of constitutional morality and democratic

norms. The Justice Panchhi Report on Centre-State Relations (2010) categorically stated that the discretion provided to the governor under Article 164 is very limited. In *Rajghindal Tilkat* (1979), the Supreme Court said that the governor's discretion must be "dictated by reason, activated by good faith and tempered by caution and should not appear to be arbitrary or fanciful". In *Rameshwar Prasad* (2006), the SC said governors should refrain from misusing their positions for partisan politics.

Lok Bhavan's communication on May 7 that the governor is not satisfied with Vijay's claim shows not only a partisan and undemocratic attitude but also a lack of understanding of the nature of a vote of confidence. To be CM, one does not need an "absolute majority" — 50 per cent plus one of the total strength of the House. A confidence or no-confidence motion is passed by a "simple majority" — 50 per cent of those present and voting. In several such motions, some parties decide to abstain, which reduces the majority mark. A TVK government, may survive.

"The good governors should have a broken leg and keep at home," said Miguel de Cervantes in *Don Quixote*. These are the constitutional ideals under which a governor had a faint presence, like a full moon at midday. His primary role as a sagacious counsellor was "to be consulted, to warn and to encourage". Alas, we now rarely get such governors.

The writer is the vice-chancellor of Chanakya National Law University, Patna. Views are personal

Nuclear restraint hinges on diplomacy, not force



SHIVANI SINGH

SINCE THE advent of the nuclear age, a great-power monopoly over fissile material and technology has sustained the larger non-proliferation "order". When this architecture faced threats of sabotage of facilities and theft of materials in the 1990s — "nuclear terrorism" — the US administration's policy emphasis shifted to "counterproliferation", a more aggressive form of meeting non-proliferation objectives. It resorted to sanctions, military threats and interdictions to prevent the spread of weapons of mass destruction (WMD). These also contributed to the larger War on Terror narrative.

A glance at these counterproliferation policies reveals a paradox. While aimed at dismantling, through force, the alleged nuclear weapons programmes of countries like Iraq and Iran, they failed to prevent North Korea from building a nuclear arsenal. The 2003 military invasion of Iraq was undertaken on the premise that the Saddam Hussein regime intended to rebuild its limited enrichment, reprocessing, and centrifuge facilities. Without hard evidence that Iraq planned to develop nuclear weapons, the US-led coalition launched a bombing campaign. The 2001 terror attacks in New York provided the pretext for what was essentially a regime-change operation.

A similar fate has befallen Iran following a history of isolation and sanctions over its uranium enrichment programme. As a Nuclear Non-Proliferation Treaty (NPT) signatory, Iran has maintained that its nuclear programme is for peaceful purposes. It has allowed IAEA inspections, albeit intermittently, and signed the Tehran Declaration in October 2003, the Additional Protocol in December 2003, and the Paris Agreement with the EU-3 (France, Germany and the UK) in November 2004. In 2005, Iran submitted a proposal to resume limited enrichment for R&D and civilian use, but it was rejected. Subsequent US actions, from its withdrawal from the Joint Comprehensive Plan of Action in 2018 to the most recent operations in Iran, have disturbed the negotiations to a halt.

This raises intriguing questions. The narrative of an "imminent" weapon acquisition by states creates a norm of stopgap intelligence and selective information to the highest rungs of decision-making. It lays the ground for a pre-emptive war. US counterproliferation efforts reveal a

recurring pattern of distrust between agencies such as the IAEA and their domestic counterparts, reducing what should be an objective oversight exercise to one driven by predetermined goals. While both Iran and Iraq may have tended to falter on complete transparency, their largely voluntary compliance with international safeguards as mandated by former IAEA director General Mohamed ElBaradei, has been met with unilateral strikes.

The policy also suffers from selective implementation. North Korea's explicit nuclear ambitions, withdrawal from the NPT in 2003, and its nuclear test in 2006 largely invited diplomatic engagement and economic sanctions instead of military coercion. Similarly, despite credible intelligence on the advancing nuclear programmes of India and Pakistan well before their 1998 tests, Washington prioritised broader geopolitical engagement in South Asia. While such strategic accommodation has arguably sustained a functional nuclear order, the selective application of "counterproliferation" policies has eroded the credibility of the non-proliferation regime. The resort to selective coercion may, ironically, have fuelled rather than suppressed the nuclear ambitions of countries such as Iran and generated cycles of defiance. This dynamic is particularly acute where the counterproliferation measures have undermined Article IV rights to peaceful nuclear energy under the NPT.

As the non-proliferation discourse has, over time, been systematically conflated with counterproliferation, it has legitimised coercive responses in place of diplomatic engagement. This risks undermining the voluntary architecture upon which the nuclear security norms rest, alienating the states whose cooperation is essential.

The NPT Review Conference is underway in New York. Restoring consensus between nuclear and non-nuclear armed states hangs in the balance, while longstanding NPT members and US allies such as Japan and South Korea eye nuclear weapons capability. American unilateralism is a major obstacle. It is imperative to strengthen incentives for states to remain committed to the NPT. A good start would be a renewed emphasis on diplomacy.

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PARVINDER SINGH

From 1857 to today, power writes the story

ON MAY 10, 1857, sepoy at Meerut began their revolt, igniting a conflict that spread across northern India. Many Indians know this story well. However, less well known is the narrative British crafted about the rebellion at the time, through newspapers and public performances, and how that narrative marginalised Indians.

Reading the British press and theatre of 1857 is like entering a parallel universe. Consider *The Times* of London. Early reports on the present events "indicated almost complacent assurance: 'So far there is no great grievance to be remedied, and no immediate danger to be apprehended.' The phrasing is telling. If there is "no great grievance", then the revolt cannot be about decades of economic extraction or the humiliation of kings and communities.

That tone changed once news of Delhi and what was then Cawnpore reached Britain. Reporting dwelt on massacres of Europeans. What it did not do was reckon with the violence of loot collection, forced crop patterns, or artisans reduced to pauperism by Company trade policies. When British papers did look for causes, they turned to Indian "fanaticism" and "credulity". The greased cartridges became a story not of a pattern of religious interference but of irrational sepoy. The missionary Alexander Duff could thus insist that "deep designing men... invented these falsehoods to lead them to rise and overthrow the government".

If the press produced the daily narrative, Victorian theatre gave it emotional flesh. At Astley's Royal Amphitheatre, a spectacle titled *The Storming and Capture of Delhi* opened in November 1857. It promised audiences that the drama was "founded upon the present events". This meant costly changes, tableaux of "natives" and, crucially, British officers as the moral centre of the story. The uprising was to be consumed as spectacle.

Seen from 2026, this might seem like a distant cultural curiosity. However, the narrative still holds significance. It influenced how generations of Britons understood 1857: Not as a broad, chaotic, multi-class revolt against an exploitative corporation supported by a distant Crown, but as a contained episode of "mutiny" that ultimately demonstrated the resilience and necessity of imperial rule. For Indians today, especially for those who work in communications and advocacy, revisiting these narratives is a reminder of how power writes its own innocence into the record. Contemporary corporate and geopolitical power still relies on narratives that make structural violence disappear into abstractions: Collateral damage, market reforms, security operations, stability. When farmers, workers, indigenous peoples or small states push back, the dominant frames often pathologise them — as misled, emotional, extremist, or anti-development — rather than asking what policies brought them to the brink.

We owe it to the rebels and to ourselves to resist the script that the empire wrote. The story of 1857 is not only of sepoy's turning their guns on their officers. It is of a society pushed beyond endurance by an unaccountable corporation, and of a world power determined to deny that fact, even to itself. In rereading 1857 through that lens, we might also sharpen our gaze on the empires — corporate and geopolitical — that shape our present.

The writer is head, Communications and Media, World Food Programme in India. Views are personal

40 YEARS AGO

May 9, 1986



Akali Dal splits

THE AKALI Dal split with 27 dissidents forming a separate group in the Vidhan Sabha and reducing the Barmala government to a minority in the House. The Speaker, Ravi Indar Singh, has recognised the dissident group as a separate political party and ruled that, as it consists of more than one-third of the strength of the Akali Dal legislature party, its members "do not incur any disqualification" under paragraph 3 of the 10th schedule of the Constitution.

Ershad on elections

WITH THE Jatiya Party still needing 69 seats for an absolute majority in the National As-

sembly and only slightly ahead of the Awami League-led alliance, the Bangladesh President, HM Ershad, asserted that it will be able to form the government. He said that in case it fell short, the party leaders would know how to go about their business, indicating that the 20 Independents elected so far could be made use of.

Tackling the AIDS crisis

THE GOVERNMENT has formulated and launched a national plan of action to prevent and control AIDS. All blood from professional donors will be screened hereafter to detect the presence of AIDS and the hepatitis-B viruses. The import of blood and blood products from outside will be strictly regulated to

ensure that they are not infected with the AIDS virus. An alert has been sounded in all 106 medical colleges. Directors of health services in all states, and the Indian Medical Association, have also been alerted to look out.

National education policy

THE LOK Sabha adopted the draft policy on education after a stout defence of the policy by the Human Resource Development Minister, P V Narasimha Rao. Rao said the country will have a national system of education with a core curriculum that will be monitored. The curriculum has been formulated in consultation with the states, and various experts' views on the subject have also been taken into consideration.

The Ideas Page

SATURDAY, MAY 9, 2026



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In AI world, future belongs to students who can think beyond the machine



ASHISH DHAWAN AND PRAMATH RAJ SINHA

WHAT SHOULD I really study? Will the degree I am pursuing matter in five years? Ten years? These questions on the careers best suited for students today are being asked in classrooms, families, and counselling sessions. They are not new. But they are pressing harder.

The unease is one of pressure, of too much changing at once. AI deepens that unease, but the question underneath is older. It is about education itself, and what students need to carry into a working life none of us can fully predict.

AI is now a fact of daily life, including at the workplace. Job roles are being reorganised, tasks and workflows redistributed among teams and tools. Turn-around times are getting shorter, and expectations of productivity rising.

This is showing up across different kinds of work. In design, for example, a field once thought to be the exclusive domain of human intuition, generative tools are already improving output quality and freeing time for higher-order creativity (Figma, 2026). Similarly, in financial services, there is increasing focus on the responsible deployment of AI and its institutional integration (Cambridge Centre for Alternative Finance, 2026).

Used actively and with intention, AI is more than a functional productivity tool. It advances what a single person can take on: A young professional fluent in digital tools for research, analysis, and execution can now do work that once needed a team.

Think of AI as a huge, tireless brain holding answers to any question. But what to ask, within which constraints, and what

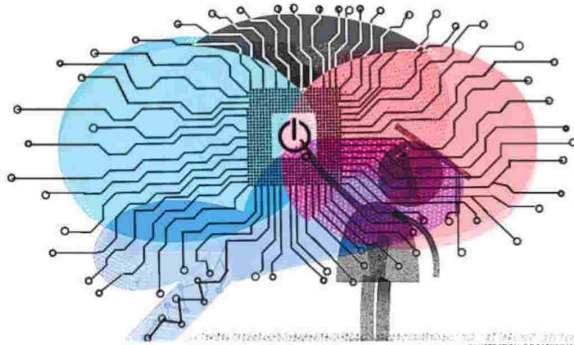


ILLUSTRATION: C R SASIKUMAR

to look for in the answer, is the part only the human can direct. Framing the right problem requires giving AI the right history and concerns. The quality of the answers is, in the end, governed by the quality of asking. For curious minds, that is an ever-present opportunity: To expand learning, go deeper across topics, and follow an idea further than was ever possible before.

While AI is increasingly an always-available collaborator for defined activities, the centre of the world lies elsewhere: In why what we do matters, and to what end.

The mission of the work we do is of an altogether different order. A healthcare company helps people be well. A school teaches a child to think. An agri-tech firm enables a farmer to earn more from the same patch of land. These are inquiries into the world and the human beings who live in it. They demand command over context and a real stake in the outcome.

Global tech leaders developing AI are saying this, too. It can support that work. It can generate

options, surface patterns, and accelerate decisions. But choices in the real world carry real consequences. That accountability remains human.

The questions a student today should be asking are not simplistic or even easy. What changes do I want to see in my community, my city, my country? How do I want to contribute? And why? These shape the interests and passions of our young people, who, motivated by the mission they want to be part of, will go on to build India and its future.

This is what great universities have always made possible. The transition from school to college is a transition into a more complex, heterogeneous world. A student leaves home, lives among peers from different states and backgrounds, and steps into a place where ideas are debated openly and pushed back against. That is formative in a way no tool can substitute. AI is at its best when it is helpful and obliging; college is where you learn to be tested. When digital tools today can produce comprehensive answers in just a

Think of AI as a huge, tireless brain holding answers to almost any question. But what to ask, within which constraints, and what to look for in the answer, is the part only the human can direct

click, the patience, discipline, and, sometimes discomfort, of working out an answer for yourself becomes more valuable, not less.

Employers agree. In entry-level hires, beyond AI fluency, they continue to look for timeless human capacities for a faster world: Structured problem-solving, data literacy, a credible point of view, intellectual humility, and clear communication.

As student outcomes have always mattered, parents, too, are beginning to ask critical questions: About real-world exposure, how technology is being integrated into their child's learning, whether their child will be ready for a dynamic workplace that themselves in their own routine lives are still learning to navigate.

The adjustment Indian universities now need to make is in how they teach, what they assess, and how they prepare students for a market that will keep changing. Treating AI as one more elective is not the answer. Nor is narrowing education to what seems immediately rewarding. Rebuilding the education experience around holistic learning, critical reasoning, and breadth. Breadth here does not mean dilution. It means awareness across domains, the instinct to connect ideas, and the ability to think and write clearly.

The market itself reinforces this. People today change roles and industries far more often than earlier generations did, and what stays with them is a way of being and doing. With remarkable judgement, clarity, and the readiness to keep learning and skilling.

India today has one of the largest and youngest workforces in the world. That is a unique advantage if our students can collaborate with technology to meaningful effect, while continuing to relentlessly enhance their fundamental human thinking. Seeing which problems are worth solving, holding the line on quality, bringing other people along, and the vision to grow.

A good education has always asked exactly this of its students. AI does not change that ambition. It raises the stakes of meeting it.

The writers are founders of Ashoka University, Delhi-NCR. Views expressed are personal

Behind Fortress Bengal's fall, anti-incumbency, a ruthless plan



JAWHAR SIRCAR

FORTRESS WEST Bengal has finally crumbled before the Bharatiya Janata Party (BJP). It was one of the last hopes of liberals, and Mamata Banerjee and her Trinamool Congress (TMC) had managed to ward off the juggernaut for well over a decade with unusual grit. This switchover, incidentally, ends an unbroken historical record of half a century when Bengal invariably elected a party to power that was diametrically opposed to the one ruling Delhi. No one can deny that there was a strong anti-incumbency wave. Many were, however, confident that the secular DNA of Bengal would never allow a Hindi-Hindu party to triumph. But people decided that the TMC had become worse than the Left Front government that it unseated in 2011, so intolerable was its misgovernance and corruption. Banerjee's *mansabdari* model ensured that local strongmen were free to extract cuts from all economic activities in their zones. They ruled with fists and greased palms; they terrorised Congress and the Left parties as well.

But nature abhors a vacuum, and the hitherto-puny BJP stepped in after 2014 to give refuge to all the TMC's political opponents, the good, the bad, and the ugly. Funds came in profusely from both the central party and the local north-Indian business community, disgusted with Banerjee's antics. The BJP gained in strength. Its votes went up from a mere 19 lakh in the 2011 assembly elections to 55 lakh in the next one in 2016 to a whopping 2.28 crore in the 2021 assembly polls and 2.84 crore now.

Muslims constitute 27 per cent of the state's population, and if one assumes that they do not vote for the BJP, it would appear that this party's total vote share of nearly 46 per cent (8 per cent jump) represents the largest chunk of Bengal's Hindu vote of some 72 per cent. This time, Muslims were 'cut to size' by the Special Intensive Revision (SIR) of electoral rolls; many voted for the Left or Congress, reducing the TMC's vote share.

Interestingly, Dalits constitute almost 24 per cent of West Bengal's voters, but they pale into insignificance due to the hegemony of three or four upper castes who flaunt their *bhadrak* status with just about half the Dalit numbers. The BJP understands caste rather well — at least in harvesting votes — and it targeted the two biggest Dalit groups, the Rajbanshis and the Namasudras (mainly immigrants from Bangladesh, legal or otherwise). It worked on other Dalits in the western districts and targeted the Scheduled Tribes and OBC Mahatras there. The educated, secular



'casteless' urban babus — irrespective of party — found *jat* and 'religion' to be ever so retrograde in political discourse, but the BJP lauded its way to counting halls. Jobless or underemployed youth were disillusioned with the TMC, and the more educated sections couldn't care less for Bengal's subnational values, thanks to 12 years of sustained Hindu and India-is-great propaganda. A large section of women, once enamoured with Banerjee's strong pro-women stand, must also have moved away.

But the SIR, with its dubious legality, delivered the coup de grace. Having conducted two parliamentary elections in Bengal as well as roll revisions as chief electoral officer, one can decipher the anti-voter stratagems of the SIR writ large. This could not have been drafted by bureaucrats, however obsequious they be. It appears to have been crafted outside Nirvaachan Sadan, by amoral corporate strategists and highly paid legal brains. Booby traps, like 'unmapped voters', 'under adjudication' millions, and 'logical discrepancies' disenfranchised lakhs of genuine voters. The SIR's totally secret computer-driven programme knew exactly how to identify and slash Muslim voters and others who may reduce one party's margin. As a ruthless super-plan looked upon ever so indubitably by the highest court, all the SIR needed was a biased and collaborative election chief. He was available to foob off queries and criticism.

It was indeed a dark day when the apex court decided to use Article 142 of the Constitution to override Section 24 of the Representation of the People Act, which had worked so admirably for 75 years, without ascribing reasons. This ensured that 27 lakh hapless voters could not vote and it was made to appear trifling.

Now that it has been rammed through, we need to wake up to this new template that will rule elections henceforth. And Bengal will have several years to ponder over the effects of welcoming a regime whose values are largely antithetical to its core culture.

The writer is a former Rajya Sabha MP

LETTERS TO THE EDITOR

Governor out of line

TO EVERYONE'S surprise, the Governor has insisted that Vijay produce formal letters of support from enough MLAs before the swearing-in process can move forward. It is questionable whether the Governor has such powers ('Vijay goes back to Raj Bhawan, told to show majority first', *IE*, May 8). The Constitution Bench of the Supreme Court in *SR Bommai v Union of India* made it clear that the floor test is the only reliable test by which a government can prove its majority. Given this, the Governor was wrong in not inviting Vijay to form the government.

SS Paul, Nadia

Year-long emergency

THE EDITORIAL rightly identifies our seasonal complacency toward air quality. Delays in pollution control calls for a wider lens, *IE*, May 8) While the winter haze is gone, the invisible surge of ground-level ozone — peaking this May — presents a fresh public health crisis. Our regulatory framework, as it stands, primarily the Graded Response Action Plan (GRAP), is far too focused on particulate matter (PM). This narrow approach overlooks the dangerous summer chemistry of NOx and VOC emissions. We must move beyond reactive, seasonal fixes. Only long-term shifts toward cleaner transport and reduced coal dependency will address Delhi's air quality as the year-round emergency it has become.

Ananthapadmanabhan, Bengaluru

Not a pan-India truth

THE AUTHOR'S analysis is extremely layered and well-researched ('What dietary politics has to do with Sanatan Dharma', *IE*, May 8). The connection drawn between *sattvik* food culture and the political framing of Sanatan Dharma is thought-provoking. What stands out is how a regional upper-caste food tradition has been quietly elevated into a pan-Hindu identity marker. India's dietary practices are enormously diverse. Any religious or cultural framework that centres one regional tradition risks misrepresenting the civilisation it claims to speak for.

K Sakunthala, Coimbatore



RAM RAJYA BY RAM MADHAV

DURING THE Independence movement, Bengal repeatedly established its nationalist credentials. The year 1911 stood out. It witnessed four major events that highlighted the nationalist fervour of Bengal's people. At the Calcutta football ground that year, Mohan Bagan's barefoot players defeated the East Yorkshire Regiment club to lift the IFA shield. The same year, Rabindranath Tagore wrote his famous song for Mother India, 'Jana Gana Mana'. On a cold day in Delhi in December, the visiting British monarch George V hosted a massive durbar, where he announced the revocation of the Partition of Bengal — it was a big victory for the nationalists. Finally and most importantly, in that speech, George V also announced the decision to shift the capital of His Majesty's Government (HMG) from Calcutta to Delhi. Calcutta's European elite was not happy. 'HMG', screamed The Statesman, indicating not His Majesty's Government but 'Hardinge Must Go'. Lord Hardinge was the Viceroy who executed both the annulment of the partition of Bengal and the shifting of the capital. He tried to justify the demotion of Calcutta as punishment for the nationalists. But not everyone was convinced. An interesting debate took place in the House of Lords in London. Lord Curzon, the former viceroy who had been instrumental in the disastrous decision to partition Bengal in 1905, criticised this

Two trysts with nationalism, 1911 & 2026

successor. 'They desire to escape the somewhat heated atmosphere of Bengal,' he said.

Fifty-six years after that significant year and 20 years after independence, communists shared power with defectors from Congress. Ten years later, in 1977, the Left Front came to office and ruled West Bengal for 34 years, causing enormous damage to its nationalist fabric. At the stroke of the centenary of the British escape from the 'nationalist heat', in 2011, the Trinamool Congress (TMC) came to office. Its politics in the past 15 years revolved around chauvinism, anarchist politics and appeasement of the worst kind.

After 115 years, Bengal's nationalists have bounced back. In an election held in a 'fearless' atmosphere, the people of the state, yearning for *parivartan* (change), chose to show the TMC the exit door. The communists first, and the TMC subsequently, had mastered the art of terrorising voters. The determined efforts of the Election Commission, supported by the Union Home Ministry, ensured that the mandate expressed the genuine sentiment of the people. Bengal's deliverance from TMC misrule was much needed in the national interest. The continuation of that government for another term would have been an unmitigated disaster not only for this great state but also for the entire country. India's national integrity was at stake during Mamata Banerjee's misrule.

Cultural nationalism was Bengal's heartbeat during the freedom movement. Subdued for decades, it has found vigorous expression again

The writer president, India Foundation, is with the BJP

For Gen Z, climate awareness isn't turning into action

implies a conscious choice to ignore what one knows. What is actually happening is more depressing: A generation has been given total awareness and almost no power, and has rationally concluded that awareness, by itself, is not a plan.

Consider what the system actually offers a 23-year-old who takes climate seriously. She can carry a tote bag, refuse a straw, or offset her flight, a practice so cosmetically effective and substantively useless that the carbon offset industry has become a minor scandal in Europe. What she cannot do is influence whether India builds more coal plants, whether her city gets a metro line, or whether agriculture policy addresses methane. The individual-action menu is long and the individual-action impact is negligible.

We have built an entire system for expressing climate grief. We have built almost

nothing for converting it into political pressure. This is, at its core, a political failure. Climate action, in every country where it has actually happened, has been a political project: Organised, won through elections, legislation, and sustained civic pressure. India's young voters are not fighting this battle because the political system provides no channel for their care to become leverage. In the 2024 general election, no major national party foregrounded climate as an issue. Climate concern had nowhere to go, so it went back to the Instagram story where it started.

The last decade of climate communication has produced a more powerful than before

This is compounded by what social media has done to climate engagement. Platforms optimise for the most alarming content at the highest frequency, which generates anxiety efficiently and action hardly at all. A generation worn down by extinction content since adolescence has not been radicalised — it has been exhausted. There is a clinical term for this: Psychic numbing. The grief is real. It is also, politically, inert.

There is also an equity problem the climate conversation refuses to confront. The young Indian most likely discussing climate change is urban, educated, and among the country's highest per-capita emitters. The young Indian most immediately devastated by it, the farmer in Vidarbha watching the monsoon fail, the daily-wage worker in a city touching lethal heat indices in May, is often not in this con-

versation at all. When climate awareness is concentrated in a class with the most to lose from disrupting consumption, the politics it produces will tend toward the aesthetic.

The last decade of climate communication has produced a population more informed and no more powerful than before. Information without political agency is not the precursor to change but a substitute for it. The path it runs through institutions, not aesthetic elections, not reels.

A generation that can cite the IPCC's sixth assessment report but cannot name its ward councillor has not yet begun to fight. That, more than the doomsday and the despair, is the real measure of where India's climate politics stands.

The writer works at the Quality Council of India. Views are personal

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LEGAL

Why 2023 law to appoint CEC came about, the legal challenge it faces

Amaal Delhi, New Delhi, May 8

THE SUPREME COURT on Thursday described Parliament's decades-long delay in enacting a law for appointments to the Election Commission, until it was directed to do so in 2023, as "tyranny of the elected".

A bench of Justices Dipankar Datta and Sarish Chandra Sharma was hearing challenges to the Chief Election Commissioner and Other Election Commissioners (Appointment, Conditions of Service and Term of Office) Act, 2023.

This law — introduced to address the legislative gap — came under legal challenge in 2024 as it removed the Chief Justice of India (CJI) from the selection panel for Election Commissioners, replacing the CJI with a Union Cabinet minister appointed by the Prime Minister.

In fact, when Prime Minister Narendra Modi, Home Minister Amit Shah and Leader of Opposition Rahul Gandhi met in February 2025 to appoint current CEC Gyanesh Kumar, Gandhi gave a dissent note, asking the government to defer appointments until the SC decided on the petitions challenging the new appointment process.

How were Election Commissioners appointed?

Article 324(2) of the Constitution states that Election Commissioners should be appointed in a manner "subject to the provisions of any law made in that behalf by Parliament". While the Election Commission (Conditions of Service of Election Commissioners and Transaction of Business) Act, 1991, regulated salaries, tenure and the panel's functioning, it did not cover appointments.

In the absence of such a law, appointments remained under the executive's domain. The Union Law Ministry would prepare a panel, suggesting names to the PM, whose recommendation would go to the President. Over time, ECs were almost always drawn from the bureaucracy, and the senior-most EC would usually become the CEC.

In 2022, petitioners argued before the Supreme Court (*Anoop Baranwal vs Union of India*) that this left appointments in the hands of the government, compromising the independence of the body tasked with conducting polls.

What changed with the SC's *Anoop Baranwal* ruling?

In its March 2023 ruling in *Anoop Baranwal*, the top court laid down an interim process for appointing Election Commissioners until Parliament enacted a law. It said the President will make poll panel appointments on the advice of a three-member panel comprising the Prime Minister, Lok Sabha Leader of Opposition (or leader of largest Opposition party), and the Chief Justice of India.

The decision was rooted in the need to ensure that elections are conducted fairly, with an independent body to insulate the democratic process from the executive. The court made a "fervent appeal" to Parliament to strengthen the Election Commission institutionally and financially.

What did the 2023 law on EC appointments say?

After the *Anoop Baranwal* judgment, Parliament enacted the Chief Election Commissioner and Other Election Commissioners (Appointment, Conditions of Service and Term of Office) Act in 2023. The new law replaced the CJI with a Union Cabinet minister nominated by the PM. This gave the executive representation in all three seats of the selection panel, with government ministers in two of the three seats.

Further, the Act ensures that an appointment "shall not be invalid merely by reason of any vacancy in or any defect in the constitution of the Selection Committee."

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ASSEMBLY ELECTION RESULTS

'Anti-incumbency alone is a lazy way to view polls'



EXPERT EXPLAINS
RAHUL VERMA

POLITICAL SCIENTIST AND FELLOW AT CENTRE FOR POLICY RESEARCH, NEW DELHI

STATE AND national elections in India are followed by frenetic political analyses aimed at making sense of the verdicts. An oft-cited reason for electoral loss is a feeling of "anti-incumbency", or the tendency among the people to vote out the ruling party.

What exactly do analysts mean when they attribute a loss to anti-incumbency, and is holding power always a reliable indicator of losing it? If so, why? **Rahul Verma**, a political scientist and Fellow at New Delhi-based think tank Centre for Policy Research, spoke to **Rishika Singh** about the idea.

Why is anti-incumbency often suggested as a reason for an electoral loss? Is there a counterargument?

The term gets thrown around without a proper explanation of why there was a sense of anti-incumbency among voters. In some ways, this has been a lazy explanation for when governments are removed from power. Unless the reasons for anti-incumbency are provided, as well as the scale of the phenomenon, we can't clearly know its role.

For example, anti-incumbency could be due to the leadership being unavailable to the people or party workers, or the leaders not being charismatic enough. Anti-incumbency may also arise because of policy failures. Sometimes, anti-incumbency sentiments could be about what a party and its MLAs were doing on the ground. In that case, it would mean that the anti-incumbency wasn't against the leadership or policy, but against local leaders or cadres being more extractive and not helping the people.

So, citing "anti-incumbency" without analysing its drivers is not the best way to understand why a ruling party lost power.

Does incumbency always imply a potentially poor poll performance?

In some countries, incumbency is actually considered advantageous. Scholars have shown that acquiring power results in high chances of getting re-elected. Many Western European democracies and Congress members in the US see high rates of re-election, perhaps thanks to name recognition, access to resources and other factors.

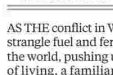
In the Indian case, incumbency has been understood as disadvantageous, according to the data. It means that once a politician gets elected, the chances of re-election are almost a coin toss — there is only a 50/50 probability of getting re-elected. The reason, perhaps, is that a large number of Indians depend on the state or government for their well-being, which is not the case in Western countries, where markets have a greater say in people's lives.

One argument is that every additional day in power increases the chances of more people becoming dissatisfied with the ruling party's performance. This is known as the idea of "cost of ruling". So voters will turn away if they find that the party in power does not further their interests.

India also has much more diverse and heterogeneous society. Any party that forms a social coalition to come to power likely faces the difficult task of retaining its support. Many groups may make several demands of the state, and it becomes difficult for the party in power to fulfil them, presenting a disadvantage going into elections.

ECONOMICS

The war in West Asia has hit the poor more than the rich



GRAPHS, DATA, PERSPECTIVES
BY UDITI MISRA

AS THE conflict in West Asia continues to strangle fuel and fertiliser supplies across the world, pushing up prices and the cost of living, a familiar question has resurfaced: Who gets hurt the most?

Whether one talks about individuals or families or whole economies, the short answer is that there is a stark difference between how such a crisis affects the haves and the have-nots.

In other words, often such crises create a K-shaped economy. This is a phenomenon where the economic divisions and inequalities widen with one (often small) segment of the economy tending to consume heavily while another (often large) segment struggles to even consume the staples.

A K-shaped economy

The war in Iran is already beginning to reveal a K-shaped pattern. Economists at



Assam CM Himanta Biswa Sarma celebrates NDA's third straight poll victory in Assam.

tually considered advantageous. Scholars have shown that acquiring power results in high chances of getting re-elected. Many Western European democracies and Congress members in the US see high rates of re-election, perhaps thanks to name recognition, access to resources and other factors.

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When it comes to the recent election results, I believe they show anti-incumbency is not just against the government but also against parties. In both the TMC and DMK's cases, we see a common thread of dynastic politics in terms of their young leaders. Similarly, the NDA's third straight win in Assam is not only about governance, but also a function of the Congress weakening, as well as the recent delimitation of constituencies.

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Why do some states see the same parties over successive terms, while others witness the opposite?

The tendency to re-elect varies by state, and I think it depends on a large set of factors — demography (meaning the social coalitions), political history (whether it's a two- or multi-party system) and how each of these interacts to produce an outcome.

However, there is no one framework or explanation for why voters in a state behave the way they do. An election is a macro event, and there are too many factors that might be shaping it. In the case of Gujarat, the BJP has been in power for 25 years, but in the neighbouring Rajasthan, every election in the same period saw power change hands.

Sometimes, election results may reflect accumulated anti-incumbency sentiment, which can be peculiar to a state. In the TMC's case, it was in power for 15 years and before that, West Bengal saw 34 years of Left rule before it was electorally diminished.

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In India, anti-incumbency is often used as a catch-all term to explain a poll result. But the phenomenon, in itself, doesn't lead to electoral loss

How has anti-incumbency played out in India? With BJP's national rise since 2014, is anti-incumbency declining?

Between the first general elections of 1952 and 1967, the Congress was in power in most states. This was a period of incumbency advantage, where the party kept getting re-elected, but between 1967 and 1989, some regional challengers arrived. The post-1989 period saw a high level of anti-incumbency.

Some parties then began adopting a strategy, like the BJP in Gujarat, where they replaced a large number of sitting MLAs to inject some freshness into the political space. Parties began realising that a lot of the voter unhappiness was with the local party organisation. Replacements allowed them to contest based on leadership popularity and organisational muscle, rather than relying on certain local candidates.

In the current period, I think there is again close to a 50/50 probability of re-election. Recently, incumbents lost power in West Bengal, Kerala and Tamil Nadu, but returned in Assam and Puducherry.

Taken together, this history shows that anti-incumbency sentiments are not only dependent on whether people are happy with the government. It could be a function of which party was in power at the national level and what kind of influence it exerted on the state politics.

In the early years, Congress governments kept returning not because they were very popular or doing everything right, but because the Congress, as a party, was quite powerful. It was organisationally strong, it had resources at its disposal and the Opposition was quite weak then.

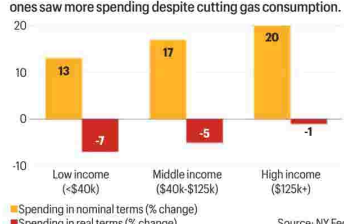
The reason that Congress governments lost power over time is that many more parties began competing for elections, more groups began making demands from the state, and more parties now represented some of those groups.

Over the last 10 years, BJP governments have become much more likely to be re-elected, with some regional parties losing out. This time, three of the regional players — the Left in Kerala, DMK and TMC — lost power. Going back a bit, the YSRCP lost power in Andhra, the BJD lost power in Odisha, and BRS lost power in Telangana.

Today, the BJP possibly has a nationwide advantage. It exists alongside other factors, including greater organisational and financial resources, and underscores the limits of anti-incumbency as a theory in itself.

Return of the 'K-shaped' economy

High-income US households increased spending in March (from Feb) while maintaining consumption. Low-income ones saw more spending despite cutting gas consumption.



Source: NY Fed

Why this research matters

These research results are based on a sample of 2,000,000 consumers over just one month but still they reveal something familiar. "These divergences in the response to an energy price shock are not unique to the month. Four years ago, energy

TAGORE'S 165TH BIRTH ANNIVERSARY

How the charkha came to embody Gandhi and Tagore's deepest disagreements

Nikita Mohta, New Delhi, May 8

IN SEPTEMBER 1921, during Mahatma Gandhi's visit to Calcutta, Rabindranath Tagore told him: "Poems I can spin, Gandhiji, songs and plays I can spin, but of your precious cotton what a mess I would make!"

Gandhi and Tagore shared an enduring friendship that lasted from 1914-15 till the latter's death in 1941. But they also shared profound disagreements about political, social and economic matters.

And perhaps no object symbolised their deepest philosophical differences more than the charkha. Tagore recoiled from Gandhi's insistence that every true Indian must spin, while Gandhi remained unwavering in his belief that spinning carried deep moral and symbolic significance. On Tagore's 165th birth anniversary Friday, we revisit the Gandhi-Tagore debates on the spinning wheel.

An inevitable conflict
Jawaharlal Nehru once observed: "No

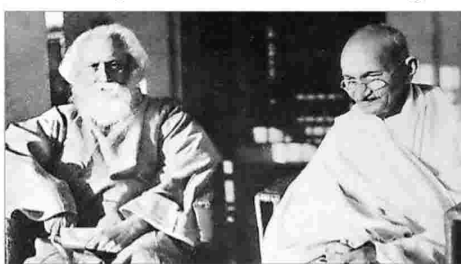
two persons could probably differ so much as Gandhi and Tagore." The conflict between them, despite a deep friendship rooted in mutual respect, was probably inevitable.

The first signs appeared in 1915, when Gandhi visited Shantiniketan after returning from South Africa. They disagreed on a range of topics — from nationalism to education and politics.

The gap grew after the Amritsar Massacre, when Gandhi initiated movements such as Non-Cooperation. Tagore worried these movements would lead to blind nationalism. Instead, he renounced his knighthood in protest.

By mid-1921, their disagreements were being openly expressed through speeches, essays and letters.

"They had differences on fundamental philosophical questions, which led to disputation about many political, social, and economic matters," wrote historian Sabyasachi Bhattacharya in his 1997 book *The Mahatma and The Poet: Letters and Debates between Gandhi and Tagore 1915-1941*.



Rabindranath Tagore and Mahatma Gandhi in 1940. WIKIMEDIA COMMONS

The 'cult' of the charkha

In November 1924, Gandhi and other Congress leaders resolved that all Congress members must wear khadi while attending

political or Congress functions, and contribute 2,000 yards of evenly spun yarn every month. Gandhi believed this would not only make India self-reliant in clothing,

but also morally transform Congress workers themselves.

Tagore disagreed sharply. He dismissed the directive as "censure in printer's ink" and responded with the essay *The Cult of the Charkha in The Modern Review*.

The enthusiasm surrounding the charkha, he argued, reflected Indians' tendency to submit to the dictates of revered figures, especially when those dictates appeared to offer shortcuts to difficult national goals. As Gangeya Mukherji notes in *Gandhi and Tagore: Politics, Truth and Conscience* (2016), Tagore feared that the natural diversity of human temperament and choice was being "kneaded... into a lump of uniformity".

Tagore also believed the original purpose of the charkha — enabling the poor to meet a basic need for clothing — was being undermined as spinning turned into ritual.

Tagore also rejected the idea that India could isolate itself from the modern world. Withdrawal from science and technology, he believed, would impoverish the country.

Gandhi answered these criticisms in *The Poet and the Charkha* in November 1925. "The fact is that the Poet's criticism is a poetic licence and he who takes it literally is in danger of finding himself in an awkward corner."

He also accused Tagore of inhabiting an ivory tower: "If the Poet span half an hour daily, his poetry would gain in richness. For you, who represent the poor man's wants and woes in a more forcible manner than now." For Gandhi, the charkha cultivated dignity in physical work, encouraged cooperation, and carried economic and ethical significance.

Uneasy dissent
Tagore was not opposed to the charkha as a means of meeting a basic human need. What troubled him was the excessive importance it had acquired in Gandhi's political and moral programme. Yet, Tagore approached this disagreement with reluctance. He acknowledged: "It is extremely distasteful to me to have to differ from Mahatma Gandhi... my heart shrinks from it."

SHARES OF THE LENDER FALL 6.62% AS RESULTS WERE BELOW MARKET EXPECTATIONS

SBI logs 5.6% rise in Q4 profit; says prolonged war may hit demand

SBI is a bellwether for the sector, and its loan growth gives an indication of the state of the banking system

Akash Mandal
Mumbai, May 8

BANKING BELLWETHER State Bank of India (SBI) on Friday reported a 5.6% on-year rise in net profit for the fourth quarter of financial year 2026 (Q4FY26), missing analysts' expectations as non-interest income fell sharply following the Reserve Bank of India's restrictions on forex arbitrage and a rise in government bond yields due to the war in West Asia.

The lender's net profit rose to Rs 19,684 crore in the quarter under review, against Rs 18,643 crore reported in the same period last year. The board has declared a dividend of Rs 17.35 per share for FY26.

Chairman GS Setty, while maintaining his guidance of 13-15% growth in loans going forward, did caution that should the West Asia conflict continue for an extended period of time, there could be an impact on demand. "While the impact of the West Asia war has so far been limited, it could affect the consumption environment of the country if the war significantly prolonged," Setty said.

"...we assume that if inflation is at 4%, the domestic consump-

tion may not be badly impacted, but if it goes beyond that and if the war lingers for a longer time, I think the consumption demand moderation will impact the economy," he said in a post earnings call on Friday.

SBI shares fell by 6.62% to Rs 1019.55 on the BSE on Friday as the results were below market expectations.

Total income declined to Rs 1,40 lakh crore in Q4FY26 as against Rs 1,43 lakh crore a year ago, resulting in total non-interest income falling 29% on-year to Rs 17,314 crore.

The bank's income from treasury operations fell to Rs 1,259 crore from Rs 8,891 crore a year ago, resulting in total non-interest income falling 29% on-year (Y-o-Y) to Rs 17,314 crore.

This was primarily seen due to yields on government bonds which sharply declined since the West Asia war started in late February. The war has led to increased concerns that inflation might rise due to elevated crude oil prices, which led to the uptick in yields.

However, yields are unlikely to be of concern to the bank going forward, Chairman Setty said. "The overall treasury losses consist of your bond yield movement, which are sharply more than the last quarter. That is about Rs 1,800 crore," Setty said.

• DIVERGENT TRENDS



• **The bank's income** from treasury operations fell to Rs 1,259 crore from Rs 8,891 crore a year ago, resulting in total non-interest income falling 29% on-year to Rs 17,314 crore.

• **On the asset quality** front, SBI posted continued improvement in its gross non-

performing asset (GNA) ratio, which eased to 1.49% from 1.82% a year earlier.

• **The bank's deposit base** grew 11% to Rs 59.8 lakh crore as of March 31, led by a near 11% growth in savings account deposits. In comparison, current account deposits grew only 4.5%.

The bank's net interest income rose over 4% to Rs 44,380 crore. Its net profit grew 5.6% during the quarter to Rs 19,684. This was despite its net interest margin (NIM) declining 77 basis points quarter-on-quarter to 2.81%. The pressure on margins was largely due to the impact of the 25-basis-point cut in the repo rate by the RBI in December 2025, which has now been priced in fully in Q4. Setty said after the bank announced its earnings. For FY26, however, the bank delivered a domestic NIM of 3.03%, matching the bank's earlier guidance of margins staying above 3% for the financial year. It also guided for NIMs to stay above the 3% mark in FY27.

On an overall level, the bank's loan book grew nearly 17% Y-o-Y to Rs 49,333 lakh crore as of March 31. Its retail and corporate loan portfolio, the two biggest components of the bank's loan

book, grew around 18% each. SBI is a bellwether in the banking sector, and the bank's loan and deposit growth provide an indication on the state of the banking system.

Setty said he expects credit growth to remain in the 13-15% band in FY27, based on the current macroeconomic environment in the country. In FY26, the bank saw credit growth of 16.9%.

The bank's deposit base grew 11% to Rs 59.8 lakh crore as of March 31, led by a near 11% growth in savings account deposits. In comparison, current account deposits grew only 4.5%. This led to the bank's current account, savings account (CASA) deposit ratio shrinking to 51bps to 39.46%.

Lower CASA ratio indicates potentially higher lending costs for the bank, which might weigh on profitability in the long run. SBI may offer Rs 80,000 cr under ECLGS.

The lender is in a position to disperse loans worth up to Rs 80,000 crore under the government's Emergency Credit Line Guarantee Scheme (ECLGS) 5.0, Chairman C S Setty said on Thursday. "Now that the eligibility guidelines are clear, we know which customers qualify under the scheme. Credit facilities worth around Rs 70,000-80,000 crore could be extended to our customers through ECLGS," Setty said.

FULL REPORT ON
WWW.INDIANEXPRESS.COM

Why India should brace for new US tariffs before July

Ravi Dutta Mishra
New Delhi, May 8

THE UNITED STATES COURT of International Trade (CIT), one of the first federal courts to rule against the Trump administration's use of emergency tariff powers, has dealt the Trump administration another blow, declaring its sweeping 10% tariffs imposed under Section 122 of the US Trade Act of 1974 unlawful.

The US President Donald Trump has not immediately used Section 122 tariffs to impose global tariffs after the US Supreme Court in February declared the International Economic Powers Act (IEEPA) tariffs illegal. And the administration had prepared for new tariffs when 10% tariffs were set to expire within 150 days on July 24.

However, the CIT's order could move up the Trump administration's plan to introduce a new tariff architecture. This could have an impact on India, as New Delhi has agreed to a trade deal but has yet to sign the agreement. Last month, an Indian delegation visited Washington for another round of talks.

India was one of the hardest hit countries, as the US, starting in August last year, imposed 50% tariffs on India, hurting exports and Foreign Direct Investment (FDI) in the country. Goods exports have also taken a hit due to the ongoing West Asia crisis. Exporters said that shipments to the US have begun recovering since March.

Deborah Elms, Head of Trade Policy at the Hinrich Foundation in Singapore, in a social media post, said that the CIT's order may not be a significant relief because the order nullifies tariffs only for the plaintiffs. "The statute [Section 122] was only intended to be used until July. In fact, the world will likely face higher tariffs even sooner, as the Trump team is likely to respond by pushing forward application of Section 301 and new or ex-



The US has launched two Section 301 investigations on India, alleging "structural excess capacity" and "forced labour". REUTERS

isting "structural excess capacity," Elms said. US Treasury Secretary Scott Bessent had said last month that President Donald Trump's tariffs may be restored by July to the levels in place before the Supreme Court struck down IEEPA tariffs. "We had a setback at the Supreme Court in terms of the tariff policy, but we will be implementing or conducting Section 301 studies, so the tariffs could be back in place at the previous level by the beginning of July," Bessent said, as per Bloomberg.

Trade experts said that the Section 122 tariffs were on a weak legal footing because the law was originally enacted to deal with serious balance-of-payments crises and persistent dollar outflows. However, since 1973, the United States has operated under a free-floating dollar system, where trade imbalances are adjusted through exchange rates and global capital flows rather than import restrictions. The US continues to run large trade deficits while still attracting massive foreign investment because the dollar remains the world's dominant reserve currency. Former trade officer and founder of think tank Global Trade Research Initiative (GTRI), Ajay Srivastava, said that India should wait until the United States develops a more stable and legally reliable trade system before concluding the Bilateral Trade Agreement.

The continuing uncertainty around U.S. tariff policy, with major Trump-era tariffs repeatedly struck down by courts, makes any long-term trade commitments by India difficult to justify, he said.

"At present, the US is also not prepared to reduce its standard Most-Favoured-Nation (MFN) tariffs, while expecting India to lower or eliminate its MFN duties across most sectors. Under such conditions, some trade deal risks becoming one-sided, with India offering permanent market access concessions without receiving any meaningful tariff benefits in return," Srivastava said.

The US has launched two Section 301 investigations on India, alleging "structural excess capacity" and "forced labour," India, in response to the probe last month, said that India's merchandise export-to-GDP ratio of around 12% reflects a largely domestic demand-driven economy and that its legal framework aligns with the forced labour standards of the International Labour Organisation (ILO).

The USITR had argued that structural excess capacity and production in manufacturing sectors present a serious challenge to America's efforts to restore supply chains and provide good-paying jobs for American workers, and that key trading partners have developed production capacity unneeded from the incentives of domestic and global demand.

Key Tata Trusts board meeting deferred to May 16

George Mathew
Mumbai, May 8

THE LONG-awaited Tata Trusts board meeting scheduled for Friday has been postponed to May 16, with the trust giving no reasons for the deferment, a top official said.

The key issues on the agenda included review of Tata Trusts representation on the board of Tata Sons, differing views among trustees regarding the potential listing of Tata Sons along with the matter of perpetual trustees.

According to the agenda of the meeting, the board was expected to discuss the position of two trustees on the listing of Tata Sons on the exchanges. Two of the trustees — Venu Srinivasan and Vijay Singh — had recommended listing of Tata Sons.

The argument for the listing of Tata Sons by two trustees is contrary to the resolution passed by Tata Trusts to retain the company as an unlisted entity a year ago.

Following a directive from the Reserve Bank of India requiring upper-layer NBFCS to list, Tata Sons repaid its debt and sought de-registration from that category and a decision from the regulator is awaited. Noel Tata is opposed to a listing as it could dilute the trusts' vote powers.

The board met has gained attention amid reports that the resolution proposing the re-

moval of Venu Srinivasan from the Tata Sons board is likely to be put to vote before the trustees. According to sources, Bhaskar Bhat, who earlier headed Tata Company Ltd, is likely to succeed Srinivasan. Currently, Noel Tata and Venu Srinivasan are on the board of Tata Sons as representatives of Tata Trusts.

Bhat is on the board of Sir Dorabji Tata Trust. The board was also expected to discuss a complaint filed in the Maharashtra Charity Commissioner's office about the perpetual/life-term trustees. The petition, filed by lawyer Kalyani Agrawal of law firm SVK Co, has sought urgent intervention, alleging that Sir Ratan Tata Trust (SRTT), which has three lifetime trustees in a board of six members, violated the provisions of Section 30A of the Maharashtra Public Trusts Act, 1950. This section, introduced through an amendment in September 2025, says perpetual or lifetime trustees can make up only 25% of a public trust's board.

The ratio is now 50%. However, it's not clear whether the review of Tata Sons board representation and removal of Srinivasan, a member will get unanimous backing of trustees.

Earlier, Vijay Singh's re-nomination onto the board of Tata Sons was opposed by Mehli Mistry.

New promotion policy: RBI staffers stage protest

Aanchal Ganesh & George Mathew
New Delhi/Mumbai, May 8

EMPLOYEES OF THE Reserve Bank of India (RBI) staged protests on Friday at multiple offices of the central bank across the country, including the headquarters in Mumbai, against a new internal policy that ties promotions to vacancies instead of the earlier time-bound system.

In a letter to Governor Sanjay Malhotra, the Reserve Bank of India Officers' Association (RBOIA) said, "We earnestly request the top management to reconsider the matter urgently and initiate a comprehensive review of the revised promotion policy in consultation with RBOIA so as to arrive at a fair, balanced and sustainable framework for career progression of officers."

A senior central bank official said the RBI will address employees' concerns.

"The RBI reviews the internal HR policy from time to time. The central bank will discuss with employees about the issues involved and address their concerns," the official said. However, the RBI's official spokesperson did not respond to a mail from *The Indian Express* about the HR changes and the protests. Protesting employees were addressed by Deputy Governor Swaminathan on Friday in the Mumbai head office.

In the letter, RBOIA General Secretary Jee Pathak said the association had participated in



Protesting employees met Deputy Governor Swaminathan in the Mumbai head office. FILE

the consultative process with the legitimate expectation that the long-standing issue of stagnation in the officer cadre would finally be addressed.

"In your interactions with us and with our members at regional offices, you have indicated the possibility of a few time-bound promotions. However, the final policy has not only failed to address the structural stagnation prevailing across grades but has also disregarded the core concerns repeatedly highlighted by the Association," RBOIA said in the letter. "Assured, time-bound promotions may be introduced across all cadres from Grade A to Grade E, ensuring fair and predictable career progression for officers," the letter further said. Under the revised policy, updated on May 5, while promotion from Grade B to C will continue to be time-bound and take a minimum of 7 years, stepping up from Grade C to D and further up to Grade F will be on the basis of available vacancies in the higher rank.

• THE CHANGES

UNDER THE revised policy, promotion from Grade B to C will continue to be time-bound and take a minimum of 7 years, stepping up from Grade C to D and further up to Grade F will be on the basis of available vacancies in the higher rank.

ACCORDING TO data available on the RBI website, a total of 40 posts have been advertised for Grade B (General Cadre) in 2026, down from 83 in 2025.

will be on the basis of available vacancies in the higher rank. According to RBI officers, there is acute stagnation, which the RBI management is unable to address due to the lack of long-term manpower planning.

"The revised policy will especially impact promotions from Grade C to D. The result of this policy will be that at the level of C, the officer could possibly remain at the same level for even 15 years. For instance, once you make Grade D to Grade E vacancy-based, then vacancy at Grade D also reduces as fewer people get promoted to Grade E. So, stagnation at Grade C also increases. This year, for example, there were around 40 Grade D vacancies, but the upcoming batch of Grade C officers have 150-200 people on average. So, within the same batch, it will take five years for people to reach Grade D," an employee told *The Indian Express*. **FULL REPORT ON**
WWW.INDIANEXPRESS.COM

• THE TATA-OWNED CARRIER IS ESTIMATED TO HAVE SUFFERED A LOSS OF ABOUT RS 22,000 CRORE IN 2025-26

Air India defers pay hikes amid focus on saving costs

Sukalp Sharma
New Delhi, May 8

THE AIR India has deferred the annual increments by at least one quarter while assuring its employees that it was not anticipating any layoffs, as the airline called for a "relentless" focus on saving costs in the face of mounting losses.

The Tata-owned carrier is estimated to have suffered a loss of about Rs 22,000 crore in the financial year 2026 (FY26). It was more than double the loss in FY25, primarily due to the extremely challenging cost and operating environment, it is learnt.

According to sources, the

airline also announced that it will proceed with bonuses for the last financial year and implement the planned staff promotions.

The airline's board held a meeting on Thursday, in which cost-optimisation measures were deliberated.

A day later, chief executive officer Campbell Wilson, chief human resources officer Ravindra Kumar GP, and chief financial officer Sanjay Sharma addressed employees in a town hall meeting.

For the time being, more drastic cost rationalisation measures like furloughs and layoffs have not been taken, it is learnt. Air India has an em-



For now, more drastic cost rationalisation measures like furloughs and layoffs have not been taken by the airline. REUTERS

ployee strength of about 24,000. The Tata group took control of Air India from the government in January 2022.

According to sources with direct knowledge of the matter, Wilson spoke about the significant external challenges that the airline industry is grappling with, and the impact those challenges on Air India.

"We need to focus relentlessly on our costs in these tough times... There must be a laser sharp focus on eliminating wastage and leakages," Wilson is learnt to have told the Air India staff on Friday.

He also asked them to suspend discretionary spending, renegotiate rates where feasible, and defer non-critical expenditures.

The West Asia war, which began on February 28, has led

to major airspace disruptions in the Gulf region, which accounts for a significant chunk of international air traffic to and from India.

The region also serves as a critical corridor for Air India's flights to Europe and North America, which means that apart from disrupting operations to destinations in West Asia, the war has forced the airline to take longer, circuitous routes to Europe and beyond.

This is leading to higher operating costs, particularly due to additional fuel burn at a time when jet fuel prices are also surging due to war-related supply disruptions. **FULL REPORT ON**
WWW.INDIANEXPRESS.COM

• BRIEFLY

Sebi completes overhaul of buyback framework

New Delhi: Markets regulator Sebi on Friday proposed a series of changes to the buyback framework, including the re-introduction of open market share buybacks through stock exchanges and shortening execution timelines. In a consultation paper, the regulator proposed that open market buybacks through stock exchanges should be completed within 66 working days from the date of opening of the offer, instead of the earlier framework that allowed as long as six months duration. PTI

Hyundai Motor India Q4 profit shrinks by 22.2%

New Delhi: Hyundai Motor India Ltd on Friday reported a 22.22% decline in consolidated profit after tax to Rs 1,255.63 crore in the March quarter, impacted by higher commodity prices, unfavourable product mix and costs associated with capacity stabilisation. The firm had posted a consolidated net profit of Rs 1,614.35 crore in the corresponding period of the previous fiscal year, Hyundai Motor India Ltd (HMIL) said. PTI

Forex reserve drops by \$7.79bn to \$690.693 bln

Mumbai: India's forex reserves dropped by \$7.794 billion to \$690.693 billion during the week ended May 1, the RBI said on Friday. In the previous reporting week, ended April 24, the overall reserves had declined by \$4.82 billion to \$698.487 billion. The kitty had expanded to an all-time high of \$728.494 billion during the week ended February 27 this year before the beginning of the West Asia conflict, which had led the central bank to intervene in the forex market through dollar sales to check rupee fall. PTI

Zepto among 6 cos to secure Sebi's IPO nod

New Delhi: As many as six companies including quick commerce unicorn Zepto and auto components manufacturer Dhoot Transmission have secured Sebi's approval to raise funds through an initial public offering (IPO). Other companies that obtained the nod are Crystal Polo Towers, Hrestal Crop Protection, Surgiwear, and Horizon Industrial Parks, an update showed on Friday. The companies had filed their papers before October and February. PTI

• MARKETS

Sensex	NIFTY	Gold	US Dollar
77,328.19	24,176.15	₹1,55,900	₹94.48
-516.33	-150.50	Silver	Oil
-0.66%	-0.62%	₹2,61,300	\$99.69

NOTE: GOLD, SILVER RATES AS PER ALL INDIA SARAFI ASSOCIATION GOLD PER 10G, SILVER PER 1 KG; CRUDE OIL (INDIAN BASKET) AS OF MAY 7, 2026

The case for rethinking our jobs problem

No electoral cataclysm can magically create jobs and change the state of affairs, unless we can come to terms with reality



BEYOND IDEOLOGY
R JAGANNATHAN

Surveys conducted before any major election invariably show that unemployment is one of the most important issues for voters. And, routinely, most political parties promise a jobs bonanza after being elected, which they are never able to deliver once they assume power. And this is true even for parties that have been in power for long, whether it is the Trinamool Congress in West Bengal (15 years) or the Janata Dal (United) in Bihar. The situation is no better in other states, even those with relative political stability. In theory, if we assume that the jobs problem does not have a short-term solution, the evidence moves that even political longevity has not resulted in much success.

This is because neither economists nor politicians want to acknowledge a stark reality. And till we do so, the jobs problem will not be tackled effectively. Whether we like it or not, the future of mass employment in India is going to be either through contract work or self-employment.

ment for the vast majority of young entering the job market between now and 2030. The share of our young population, the 15-29 working age group, is expected to peak by then. Accepting this truth needs a change in mindset among both policymakers and jobseekers.

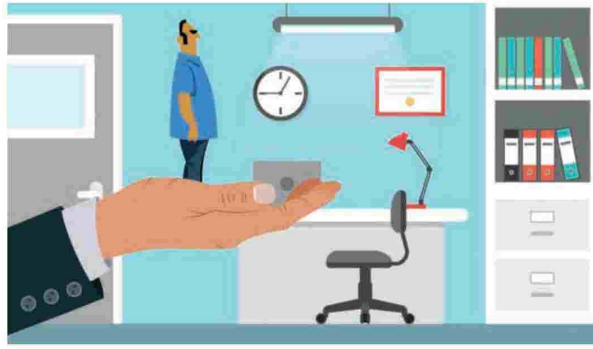
Between AI and automation, internal and external competitive pressures faced by the corporate sector, and the growing inability of even governments to create worthwhile jobs in state-led areas (education, health, policing), good-quality formal jobs with inconvertibility may be levelling off or even shrinking.

The numbers available on job trends tell a clear story. The government's 2025 Periodic Labour Force Survey (PLFS) says that 56.2 per cent of people who have some kind of livelihood are self-employed.

The Annual Survey of Industries' 2023-24 data shows that contract labour has doubled over the last quarter-century, from 20 per cent at the turn of the century to 42 per cent.

The Azim Premji University's State of Working India 2026 notes that, despite the rise in graduate qualifications, 40 per cent of young people in the 15-25 age group remain unemployed and even in the 25-29 cohort, 20 per cent don't find jobs.

Saurabh Mukherjee's book, *Breakpoint: The Crisis of the Middle Class and the Future of Work*, co-authored with Nandita Rajhansa



and Sapana Bhavsar, underlines the same issue: Graduation does not guarantee a job; rather, it increases the probability of unemployment. Mr Mukherjee's definition of the middle class is the 40 million taxpayers earning between ₹5 lakh and ₹1 crore, but this group, which is key to employment generation, is not growing due to the structural constraints created by automation, artificial intelligence

(AI) and over-regulation (among other factors). High job creating sectors like information technology (IT) services, banking and

finance, and telecom are now unable to create as many jobs as they did in the past. It is the stagnant spending power of India's 40-million-strong middle class and its growing debt that, in Mr Mukherjee's view, will constrain job growth, since nearly 200 million other Indians earn their livelihoods directly or indirectly from this group — cooks, domestic help, delivery agents, ride-hailing platform workers, among others.

The biggest job destruction has happened in middle-skill, middle-level jobs, which have been eaten up by automation and AI. In banks, we can see this transition to fewer middle-skill jobs in the increasing officer-to-clerks ratio, which increased from 62:36 in 2016-17 to 74:26 in 2022-23 in favour of officers, according to a Reserve Bank study on employment in scheduled commercial banks.

The jobs that remain in abundance are at the high-skill and lower-skill levels — your platform workers. This is the reality we have to work with. The polarisation in the job market. Even without embracing jobs pessimism, most policies must

be tailored to focus on this issue. The question is not whether job polarisation can be ended, but how we can make jobs at the bottom end explode and make them worthwhile as sources of livelihood.

The usual remedies we hear from economists are the following: Upskilling, deregulation, more apprenticeships, and improving the quality of education, among others. All these are good things to do, but they are not going to deliver any immediate results even if they are executed well.

First, upskilling will not work if it is government-driven, for it is not a supply-side problem. It is demand-driven. It is the corporate sector — both the big ones and the small ones, which know where the demand for permanent jobs exists — that needs to design courses and work with skill agents to drive upskilling. Governments can, at best, facilitate or subsidise these endeavours.

Second, deregulation is not a big problem at the central level; it is at the state and municipal levels where the frictions created by regulation really become speedbreakers to job creation. Most of the things that businesses need in order to grow — land, power, water and infrastructure, both physical and social, labour laws — are in the state's domain. Most of the corruption and rent-seeking behaviour also happens at these lower levels of government, and these levels are changing so slowly. Automation is thus an easier option.

Third, the freebie culture — which has now become a defining feature of our electoral democracy — is eating into state capex and also revenue spending. The recent bout of aggressively contested elections to Tamil Nadu and West Bengal, where both the incumbent governments lost the plot despite providing a string of freebies, shows that the winner is not going to have much cash left to invest in growth and jobs.

Fourth, and this is most important, several decades of quota politics — which could worsen once the caste surveys are out — have given the citizen the impression that providing cushy jobs is the government's work. Social expectations put office jobs (especially in government) at the top of the aspirational ladder for vast sections of the population, and private work in manufacturing or services comes much below that. Engineers, even if they are of employable quality, want to do coding for IT companies and not engineering work at companies that are building the nation.

No electoral cataclysm is going to change this state of affairs, unless we can come to terms with the reality of gig work and self-employment and startups. These are our best hopes for creating livelihoods for the millions who will enter the jobs market in the coming years.

Growth for our banks will come from lending and serving non-salaried people; governments and business schools must seek to promote entrepreneurship rather than salaried jobs. Salaried jobs will only be the icing on the cake, not the cake itself. Solutions will emerge only when mindsets change to acknowledge reality.

The author is a senior journalist

Bengal boomerang



PLAIN POLITICS
ADITI PHADNIS

As Suwendu Adhikari prepares to take on a crucial role in the Bharatiya Janata Party (BJP)-led West Bengal government, many of Mamata Banerjee's supporters would do well to recall a conversation at a Cabinet meeting of the United Progressive Alliance (UPA) many years ago.

Ms. Banerjee had just thrown a tantrum, got up, and left the meeting. Exasperated, a minister exclaimed: "What is wrong with Mamata?" It was a rhetorical question but Pranab Mukherjee, who was present, chose to answer it. He took off his glasses, polished them, put them back on, and said slowly: "If someone thinks she's a better poet than Rabindranath Tagore, a better (music composer) than Beethoven, and a better painter than Leonardo da Vinci, then it was always a problem."

It was Mamata's overreach, and hers alone, that drove Suwendu out of the Trinamool Congress (TMC) into the arms of the BJP.

This area of influence is south Bengal. His father, Sisir Adhikari, a Congressman, was a force to reckon with and was a minister in the Manmohan Singh government. In the region of Contai and Tamuk, dominated by the Left, Congress flag flew defiantly. As the Left empire crumbled, Nandigram hastened its collapse and it was Suwendu Adhikari

who led the protest against the Left's "land grabbing".

Recognising his potential, Mamata made him president of the TMC youth wing and the party's observer for Jangalmahal, at the time in the grip of Maoist groups. In less than five years, the TMC was able to gauge political space from both the Congress and the Left, as well as regain the trust of the youth, who were drifting into Left-wing extremism.

His rise was impressive. In 2009, Suwendu was elected to the Lok Sabha from Tamuk, defeating Communist Party of India (Marxist) strongman Lakshman Seth by 172,000 votes. He retained the Tamuk parliamentary constituency, defeating the same party's Brahmin candidate.

In 2016, the TMC held him in the Assembly election from Nandigram. He was pitted against Abdul Kadir Sheikh, joint candidate of the Left Front and the Congress. Suwendu won, getting over 67 per cent of the vote. After his spectacular win, Mamata made him minister of transport. In 2018, he was also given charge of environment. But she was getting wary of his rise. Besides, she had her own succession plan and it did not involve Suwendu. But she could not ignore his proven political worth either.

It was Mamata's overreach, and hers alone, that drove Suwendu out of the Trinamool Congress (TMC) into the arms of the BJP. This area of influence is south Bengal. His father, Sisir Adhikari, a Congressman, was a force to reckon with and was a minister in the Manmohan Singh government. In the region of Contai and Tamuk, dominated by the Left, Congress flag flew defiantly. As the Left empire crumbled, Nandigram hastened its collapse and it was Suwendu Adhikari

Nor did he particularly want to be counted as a counter. As member of the Legislative Assembly, he made it a point never to spend the night in Kolkata. He would ride 200

km every day from his constituency to the state Capital, sometimes reaching home at 1 a.m. and leaving early morning again to go to work.

The trust deficit between the chief minister and her most important minister became evident. He once observed: "I was transport minister, but Mamata never called me to the ministry."

The slights kept on piling up. At their heart was the rivalry between Suwendu and Abhishek. During Durga Puja in 2020 the differences seemed irreconcilable. Posters came up all over Suwendu's constituency at programmes he sponsored. They said: "Dadar anugami (follower of Dada)."

Officially, Suwendu denied all this. But there was no TMC banner or picture of Mamata at these meetings. In parallel, TMC leaders travelled to Nandigram and held a meeting where he was dubbed "Mr. Jaaffer".

Later that year, ahead of the 2024 Assembly elections, Suwendu joined the BJP. After she became chief minister of West Bengal, Mamata's hold on her party was such that leaders knew they needed to indulge her every whim or face a fall from grace.

This led to unforeseen consequences as several leaders who thought they had a brilliant political future discovered after they'd been dumped by Mamata — for not listening to Rabindra Sangeet with the right degree of concentration (when Mamata sang) or for not taking medicines she had prescribed (she fancied herself as a doctor), for example.

Now, as she stands against the ropes, Mamata needs to take a hard long look at herself, all those she has driven away, and ask herself why her world lies in ruins around her feet.

What's a Muslim voter worth?

These elections mark the completion of the BJP-secular party divide purely on a Hindu-Muslim basis. The BJP's rivals are increasingly looking like Muslim parties, though their leaders are all Hindus

Nearly seven years ago, I wrote this *National Interest* under the headline: "Do Indian Muslims matter?" This is an important time to raise that question again.

On the evidence of the latest state elections, especially in West Bengal and Assam, where Muslims constitute upwards of 30 per cent of the electorate, the issue remains the same, if more compounded. The answers are mixed. And politically, the conclusion would be that Muslims today matter even less to the Modi-Shah BJP than they did in 2019.

In West Bengal and Assam, the Bharatiya Janata Party (BJP) won two-thirds of the seats this time without fielding even one Muslim. Conversely, of the 24 opposition candidates who won in Assam, 22 are Muslim. This includes 18 out of the Congress tally of 19.

In West Bengal, 40 of the 293 newly elected MLAs are Muslim. Of these, 34 are from the Trinamool Congress (TMC), about 45 per cent of the party's tally of 80. In effect then, in the two states (J&K isn't a state) where Muslims have their largest population, they're out of the power structure, cleansed out, and effectively forming the only opposition to the BJP. Ironically, their leaders are still Hindus. And all of them have lost in the fight against the BJP.

These elections mark the completion of the BJP-secular party divide purely on a Hindu-Muslim basis. In Kerala, for example, of the United Democratic Front's (UDF) 102 newly elected MLAs, 30 are Muslims and 20 Christians. The secular relief at knowing that Muslims having their place at least in the Kerala sun needs to be tempered by the realisation that the BJP will now exploit this as evidence of minority rule, work on the Hindu vote and divide the Kerala Christians.

Nationally, this Lok Sabha, the 18th, had 24 Muslim MPs, or a mere 4.42 per cent while the community's proportion in the national electorate is more than 15 per cent. In the 16th and 17th Lok Sabha, there were 22 and 27 Muslim MPs, respectively. This, however, isn't as big a surprise as it might seem from a first reading. Except 1980 and 1984, when Muslims won 49 and 45 seats, accounting for 9.8 and 8.3 per cent, respectively, the percentage of Muslim MPs in the Lok Sabha has stayed around the 5-per cent mark. But they were always represented significantly in the Union Cabinet — even Vajpayee had Sikander Bakht.

They were present in significant constitutional positions like President, Vice President, Lok Sabha

Deputy Speaker, and occasional heads of armed forces and intelligence agencies. Today, there's none. There's no Muslim chief minister; J&K is a Union Territory. There's one Muslim Governor, in Bihar, Lt General Syed Ata Hasnain. Among the nearly 100-strong list of central government secretaries, Kamran Rizvi (Heavy Industries) is the only Muslim. Justice Abhanuddin Hammulah is the only Muslim among the 22 Supreme Court judges today. The last Muslim Chief Justice of India, Justice A.M. Ahmadi, retired on March 24, 1997.

While this list might give the impression of the marginalisation of Indian Muslims, it needs qualification. More Muslims are entering key professions: Medicine, law, academia, science, software, banking, and, of course, the entertainment and news media. The civil services and armed forces (including officers' academies) are seeing Muslim selections rise. The qualification, therefore, has to be that this loss of representation is specific to politics.

The headline of that first column on the same theme in 2019 was drawn from a 1999 conversation with then BJP leader, intellectual/ideological spokesperson, and former Rajya Sabha MP, Mohan Prasad. He was also briefly my colleague at the Indian Express Group, where he wrote for *The Financial Express*. Puri passed away last month. He was furious after the

second Vajpayee government lost its majority in the Lok Sabha by one vote in 1999, after the 13-day government in 1996. He was frustrated because no party that counted on the Muslim vote was willing to accept the BJP. This was the veto. Muslims had on who would rule India, and who wouldn't. The Modi-Shah era has changed all of that.

These facts lead to three important outcomes: ●BJP's rivals, or the so-called secular parties, are increasingly looking like "Muslim" parties, though their leaders are all Hindus. This is exactly where the BJP would want its opposition to be. A Hindu versus the rest equation is 80:20 in their favour. And they will keep working on the Christians in chosen geographies.

They've already conquered Goa and Kerala in early days. The BJP has patience and time. In the Northeast, they've built a comfortable compact with the Christian tribes. In none of these states has the BJP demanded a beef ban. That's why Asaduddin Ovaisi mocks their hypocrisy by taunting them with "UP Ki gai mummy, northiness mein gai yummy".

Some "secular" parties, still reliant on the Muslim vote, have grown wary of appearing to speak for them.

When 70 per cent of games feel like battling practice, the contest part of cricket dies. Fans love sixes, but they respect a 160 versus 155 nail-biter more

Like the previous AAP government in Delhi during Shaheen Bagh protests and the communal riots that followed. The fear of being seen as "pro-Muslim" kept them away.

●This puts the burden of saving Indian secularism squarely on the backs of Muslims. This is onerous, unrealistic and unfair. It's the logic of the Partition that the Muslim community is scattered and doesn't have majorities in significant electoral geographies.

Today, they're being persuaded to vote for the candidate most likely to defeat the BJP merely on the hope that it might protect them physically. This is hopelessly minimalistic in a robust secular democracy. As the Sachar Committee showed, it's done nothing for them. In fact, the report shows Mamata Banerjee's rallying call became: "I am a Muslim, but the Muslims had done under the Left in West Bengal. It's for the 'secular' parties to build large enough coalitions with the Hindus to reach winning vote shares. In the past, the Hindu heartland parties did so by dividing the Hindus among castes and signing up large enough caste groups. That fortress has now been breached by Modi and Shah. Who has any new ideas here? Certainly, this Congress looks far from it. It has the bewildered look of a confused hare on a highway, frozen in the headlights of an onrushing truck."

●Ovaisi has floated another idea: The Muslims form their own parties, choose their own leaders. This is unsustainable because all of India isn't old Hyderabad. If Muslims float their own parties, they'll be the BJP's biggest force-multipliers. The remarkable fact is, after Jinnah, Indian Muslims have never trusted a Muslim as their leader. They've counted on Hindu leaders, from the Nehru-Gandhi family to the Yashwantrao Chavan-Bhabha, Mamata Banerjee, and the Left (where they mattered). Did it work for them? Not perfectly. But they were never out of the power structure as now.

India's Muslims, Hindus and secularists all need to think afresh. The fear of being an outnumbered minority goes back to the era of Sir Syed Ahmed and ultimately led to the creation of Pakistan. Who it benefited or didn't is a debate for another day. It's odd to put them in one category, but just for our understanding, think Pakistan and Israel. One is an Islamic republic and the other a Zionist one. Both have proportionate representation and, though it works differently, it guarantees some seats for the minorities. A little bit of *jinnahbaazi, uma haq* (to each according to their absolute numbers).

India, a secular republic, follows the first-post-the-post system and to expect any proportionality in electoral representation is unrealistic. But there's a gap and an imbalance. The only way to address it is for enlightened leadership to rise and build a coalition with a sufficiently large section of Hindus. Indian Hindus chose constitutional secularism and the responsibility of preserving it lies with them. Any credible challenger of the BJP will need to build trust with them.

By special arrangement with *ThePrint*

Will 200+ scores build or erode brand IPL?



YES, BUT...
SANDEEP GOVAL

Say IPL, and the first words that pop up in your mind are enjoyment, excitement and entertainment. Add excess to that — especially this year, when fans have been treated to a brunch, with teams consistently breaching the 200-run mark with ease and aplomb. Time and time again. Almost all matches have showcased

the dominance of batters on flat, willow-friendly pitches. While this has delighted fans who obviously love the power-hitting, the constant run glut and boundaries galore have raised concerns over the diminishing contest between bat and ball.

In a recent Red Lab survey of 23 league clients, we had given the Indian Premier League (IPL) a miss this year, the feedback headlines were — "not cricket any longer", "the sixes overpower the brand messaging", "the ads almost look like intrusion in the ongoing sixes orgy". But those that have chosen to advertise (Red Lab) on the IPL broadcast say — "much more bang for the buck", "fans are happy", "every match is getting better and better" and "IPL is expensive, but great ROI". The 200+ scores are certainly

adding charm to the IPL, but also possibly eroding parts of the brand. They're changing what the IPL brand actually means or connotes, or should stand for. Let's examine both perspectives.

Sixes every over, 250 chases in 18 overs. Casual fans seem to love the hard-hitting, the lofted shots, and the chaos. IPL is selling thousands of tickets and getting millions of eyeballs — the broadcaster JioStar is said to be pocketing ₹100 crore per match. The 2024-2025 seasons saw 200+ scores become the new normal, and viewership hit all-time highs. 2026 has only gone further. T20 and IPL, some would argue, was built for this — "Cricket's Bollywood". Flat pitches, a recently introduced impact player rule, small boundaries — this is the new evolved IPL product. So, complain-

ing about 200+ in the IPL is like complaining about too many dunks in the NBA (National Basketball Association). But the IPL is today a football match with almost 40 goals scored between the two sides and a 20-19 end score. Ooops, which fan would want that?

The 200+ games have also limited instant stars. Abhishek Sharma, Jake Fraser-McGruber, Ashutosh Sharma, Vaibhav Sooryavanshi, Heinrich Klaasen have become household names because they can strike at 200+. Bowlers who have survived have also become legends. When Jasprit Bumrah defends 20 in the last over, every delivery makes for peak "cinema", not merely cricket. A quick look at the numbers: The 2024 IPL season saw 41 scores of 200+. In 2023, that number rose to 52

for the entire season. 2026 is on track to surpass 2025's record easily. For a better comparison — during 2018-2022, only 133 scores of 200+ were recorded across five full seasons combined. Between 2023 and 2026, 163 scores of 200+ have already happened, with 20 or more matches still to go this season.

But however much fun the big hitting may be, when 70 per cent of games feel like battling practice, the contest part of cricket dies. Fans love sixes, but they respect a 160 versus 155 nail-biter more. If every match is 220 vs 215, it starts feeling like a baseball home run derby. IPL used to showcase craft:

Malinga yorkers, Narine mystery spin, Bhuvneshwar. Now it's "see ball, hit ball". Bang. Bang. Bang. Young bowlers will tomorrow either become T20 mercenaries or just quit the game. In the long term, this will certainly thin out India's Test/One Day International bowling pool.

IPL's early brand was more about where talent meets opportunity. The best versus the best. Now it risks becoming "WWE with bats", with matches beginning to feel like scripted run fests. The authenticity of brand IPL, as a sporting league is seriously at risk. Entertainment is eclipsing cricket. Basically, it is a situation that is net positive for IPL but net negative for cricket. IPL's job, one understands, is to be a commercial

monster, and 200+ games print money. Broadcasters, sponsors, Gen-Z viewers are lapping it all up and enjoying the fun in large dollops. Brand value of the IPL has perhaps topped \$20-25 billion. But brand cricket has suffered.

The fix isn't fever runs — it's better balance. In 2018, teams averaged 8.42 runs per over during Power Play. Today it has jumped by 50-60 per cent. Openers' strike rate today foranball exceeds 200 per cent. What is needed? More 170+ pitches, bigger boundaries at some venues that will give bowlers something to fight. A 200 chase after a team fought to 185 is better charm than 260 vs 205 every night. 200+ scores are IPL's sugar rush. Great for TRPs, dangerous as a diet diet. The Board of Control for Cricket in India — don't kill the golden goose.

The author is chairman, Rediffusion

thehindubusinessline.

SATURDAY - MAY 9, 2026

Creditable step

ECLGS 5.0 will help war-stressed MSMEs

The Centre has done well to announce the fifth tranche of the Emergency Credit Linked Guarantee Scheme (earlier versions were operational in the Covid years) to deal with the impact of the Iran war on India's 747 crore MSMEs. These MSMEs account for 31 per cent of GDP, 48 per cent of exports and employ 32 crore persons. The ECLGS 5.0 can help in easing liquidity constraints arising out of disruption of markets and logistics.



The war has rocked the economy in many ways. For example, industries directly dependent on crude oil, gas and petrochemicals have been affected by non-availability of supplies or their late arrivals in dribbles and at high costs — impacting output. This category includes steel, glass, ceramics and chemicals units, which have been forced into erratic operations or shutdowns. Others dependent on raw materials and intermediates from China, such as pharma, electronics, solar components, EVs and automobiles, have likely been able to carry on with production — but are faced with logistics issues, payment delays and working capital stress, more so as exporters. The Centre recently set aside ₹18,100 crore to provide a ₹2.55 lakh crore loan guarantee over five or seven years to MSMEs and the aviation sector, respectively. The latter has been badly hit by rising costs of aviation turbine fuel, and route disruptions. With losses of top players ballooning, the ECLGS 5.0 has allowed for loans up to ₹1,500 crore to smoothen operations.

However, the ECLGS 5.0 is primarily aimed at keeping MSMEs afloat. As a scheme, it is ideal for lenders and borrowers. MSMEs have been allowed up to 20 per cent additional credit of the working capital utilised in Q4FY26, with 100 per cent guarantee for banks. In its earlier versions (which ended in June 2023), the credit allowed was 20-50 per cent of credit outstanding, with a guarantee corpus of ₹5 lakh crore. So, ECLGS 5.0 is smaller in scope — but the fact is that today's crisis bears no comparison to the Covid debacle. Under ECLGS 1.0-4.0, MSMEs used up only about half the guarantees on offer or ₹2.45 lakh crore. The total guarantees issued were ₹3.6 lakh crore for 26 identified sectors. However, MSME observers have sought to draw bankers' attention to trade credit, which often acts as the primary provider of working capital. In times of crisis, credit between firms freezes, as the entire chain is disrupted. ECLGS should be used to avert a breakdown of liquidity chains.

The latest support to the MSMEs comes on the heels of steps taken to soften the impact of Trump's tariff tantrums in FY26. In November 2025, the Reserve Bank of India announced a slew of liquidity support measures to the ease the working capital crunch faced by exporters. Credit guarantees for the PM Mudra Yojana and other schemes for self-employed can boost businesses at the bottom of the pyramid. Taken together, these moves can propel domestic demand at a time when growth is expected to fall below 7 per cent this fiscal.

OTHER VOICES.

The Guardian

Israel never stopped killing in Gaza

The meaning of the term "ceasefire" should be self-evident. Yet Israel's strikes have killed scores of people in Lebanon since it agreed a truce with Hezbollah under pressure from the US, with the two sides trading fire. There was a strike on Beirut on Wednesday, Benjamin Netanyahu's government would be delighted to remain with Iran. But it is wary of Donald Trump's wrath as he seeks an exit from the conflict. In Gaza, the Israeli military has killed more than 800 people since the truce was declared in October, striking almost every day. This, too, is not a true ceasefire but a de-escalation, however necessary. Lethal Israeli attacks on an engineer and drivers transporting water have intensified the water crisis that is fuelling the spread of infectious diseases. Médecins Sans Frontières has called the weaponisation of water supplies a campaign of collective punishment. <https://www.theguardian.com/world/2025/may/07/israel-gaza-ceasefire>

讀賣新聞

THE YOMIURI SHIMBUN

SDF Urged to Enhance Deterrent Power

China, which has declared itself a "maritime power," has repeatedly engaged in provocative actions in the East and South China Seas and elsewhere. It is no longer possible to protect maritime security by relying solely on the United States. Japan should actively engage in multilateral cooperation to increase its capabilities to deter China's attempts to unilaterally alter the status quo. The Self-Defense Forces must take advantage of their full-blown participation in the latest military exercises as an opportunity to deepen coordination with the armed forces of other nations and improve their response capabilities. The military exercises jointly conducted by the US and Philippine militaries in the South China Sea and elsewhere began April 20 and were to run through Friday. <https://www.yomiuri.co.jp/news/2025/05/09/sdf-deterrent>

Strategy to ramp up oil reserves

ENERGY SECURITY. Private investments must be encouraged to boost oil reserves' storage capacity



MD GYASUDDIN ANSARI

The blockade of the Strait of Hormuz has knock on effects on supply chain, energy prices and financial markets worldwide. So going ahead how do we withstand energy shocks in future?

Some of the ideas put forth include developing alternative routes, opening humanitarian channels and corridors, and creating a level playing field. Domestically, many countries have resorted to tax cuts to curb volatility in energy prices. However, these measures are short-term and work best in the near-term horizon.

In March, India cut central excise duties on petrol and diesel by 10, to cushion consumers from the impact of higher crude oil prices. Additionally, the government has increased ethanol blending up to 20 per cent, reducing the reliance on imports. These are the welcome steps that will ultimately reduce the negative impact on people.

STORAGE RESERVES

In 2004, India decided to build three Strategic Petroleum Reserves (SPRs) in Andhra Pradesh (Visakhapatnam) and Karnataka (Mangaluru and Padur) to withstand energy supply shocks, as a longer-horizon strategy. Under Phase I of the SPRs, 5.33 MMT capacity of these three locations was completed in 2019.

Under Phase II, ISPRIL (India Strategic Petroleum Reserves Ltd.), a Special Purpose Vehicle (SPV) established in 2004-05 to oversee and manage India's strategic crude oil storage, is in the process of constructing additional storage capacities at Padur and Mangaluru. Moreover, 4 MMT of SPRs at Chandikhol in Odisha is under the initial stage.

Developing SPRs take time. First, constructing these rock caverns (where petroleum is stored) is a slow, time-consuming process. Second, since India mostly exports heavy crude oil, it requires the construction of specific infrastructure. Third, the commercialisation of these facilities is still in an early stage, and the profitability is low; it may be difficult to attract private players. In 2025, a private company secured a first-of-its-kind contract to construct an SPR in India on a build-to-operate basis.

The collective SPRs, which include both public and industry stocks, bring India's total storage capacity to 74 days

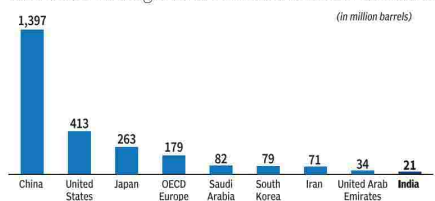


Oil stocks of the Top 10 IEA net importer countries*

Country	Total stocks	Public stocks	Industry stocks
Estonia	11,625	5,767	5,858
The Netherlands	507	158	349
Denmark	382	129	253
Finland	282	174	108
Hungary	216	96	120
Japan	205	123	82
South Korea	199	107	92
Sweden	186	0	186
Belgium	175	91	84
Slovak Rep.	163	87	75

Source: IEA, April 2026. *Days of net imports

Estimated strategic oil inventories in select countries



Source: IEA, December 2025

of net imports, combining the 9.5 days of ISPRILs and 64.5 days of Indian companies' stocks, which is lower than the International Energy Agency's (IEA) recommended 90 days of net import cover for its members.

The actual stock cover is only around 60 days of net import, and the majority of the stock comes from the industry. It is imperative to note that most of the stocks held by oil companies are public sector undertakings. A considerable part of IEA members' stocks comes from

The completion of Phase II will increase strategic petroleum reserves' capacity to 11.83 MMT, covering an additional 12 days of energy supply, bringing it to 86 days, closer to the IEA's yardstick

industry; the top 10 IEA net importers' stocks (in number of days) are mainly from industry, and public stocks are lower (Table). It is less imperative who holds the stocks as long as they are in sufficient quantities.

Six IEA countries — Sweden, Switzerland, Greece, Turkey, the UK, and Luxembourg, do not have any public stocks, but their oil stocks are held by the industry.

In terms of volume, the stocks amount to 5.33 MMT, which roughly translates to about 40 million barrels (the IEA reports only 21 million barrels, considering only dedicated stocks/storage facilities, i.e., discounting the facilities leased to foreign entities such as ADNOC, Abu Dhabi, UAE, at Mangaluru).

GLOBAL EXPERIENCE

However, India can use the leased storage/stock during a supply crunch. Globally, China leads with 1.4 billion barrels, followed by the US with 413

million barrels (Chart).

The completion of Phase II will increase SPRs' capacity to 11.83 MMT, covering an additional 12 days of energy supply, bringing it to 86 days, closer to the IEA's yardstick. Additionally, other Asian countries — Japan, Malaysia, and South Korea, hold adequate SPR levels.

However, many South Asian countries have almost non-existent SPRs; they rely on continuous supply for their needs. These are two extreme cases of SPRs, determined by numerous factors, including requirements, usage magnitude, and ease of construction of storage facilities. The higher SPRs among IEA members, especially in Europe, are driven by proximity to oil fields, ease of transportation, and the nature of crude petroleum itself (light vs. heavy). It is easier and cost-effective to transport and store light crude than heavy crude.

In the quest to create SPRs for ensuring energy security, India's strategies ahead lie in a pluralist approach.

First, SPRs should be ramped up further by increasing private stock holding. Inviting private players with incentives, such as restructuring Production-Linked Incentives (PLIs), to construct storage facilities and adopt the Public-Private Partnership (PPP) model.

Second, diversifying crude oil portfolios by buying more light crude (which is lighter than the crudes India imports most from the Middle East and Russia) from the US, i.e., WTI (West Texas Intermediate). This will require recalibrating refineries, but it is high time we diversify our refineries as well.

Third, a significant ramp-up in imports from Brazil and Venezuela is required. Since their crude is dense and heavy, storing it is costly, but it can be used contemporaneously. The majority of India's refineries cater to these types of crude. Access to Venezuelan petroleum is now easy, as sanctions have been either lifted or relaxed. This can be used to cross-subsidise the relatively expensive light-weight crude for SPRs.

Fourth, exploring the feasibility of storing oil stocks abroad should be hastened. The ISPRIL is in initial talks with Oman to lease a facility for crude oil storage. The IEA allows its members to store reserves abroad under bilateral agreements. Many IEA member countries have facilities for stocking oil abroad, e.g., the UK's storage facilities in The Netherlands, Germany, and Belgium. We must emulate this practice.

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Is India's agriculture resilient enough?

Dietary habits, rice-wheat fixation, irrigation and high input use have reshaped agroecology, with uncertain consequences

PVS Suryakumar

For most Indians, the daily plate is reassuringly familiar: rice or wheat at the centre, a *dal* beside it, and a narrow band of vegetables — potato, onion, tomato, brinjal, okra and leafy greens like *palak*. That pattern, shaped in the decades after the Green Revolution, has done more than define consumption; it has also shaped what India grows.

It helped push the country from a largely rain-fed farming system towards irrigated rice and wheat, steadily converting large tracts once sown to millets and other hardy crops.

But the same transition also narrowed crop diversity. The pressure of the rice-wheat model has not remained confined to irrigated belts. Rainfed regions have increasingly been nudged to imitate this pattern, often at odds with their ecological realities. Today, rice and wheat overwhelmingly anchor the foodgrain economy, while traditional rain-fed crops such as millets, pulses, oilseeds occupy a much smaller share of cultivated land. That change has altered the ecological balance of Indian agriculture.

The transformation of cropping patterns closely mirrors the expansion of irrigation. Net irrigated area in India has risen from about 21 million hectares

in 1950-51 to 79.3 million hectares in 2022-23. Rice and wheat together covered about 40.6 million hectares in 1950-51 and about 78.0 million hectares in recent years, so their combined area has risen by roughly 38 million hectares.

Yet the irrigation system itself rests heavily on groundwater, which has increasingly extended into traditionally rainfed regions. Source-wise statistics show tubewells accounting for nearly half of irrigated area and other wells (largely traditional open wells) adding further share, taking groundwater-based irrigation to over 60 per cent. India is also the world's largest groundwater user, with an estimated annual withdrawal of about 251 km³ — more than a quarter of global groundwater withdrawals. Water-intensive crops have rendered surface irrigation inadequate.

SUSTAINABILITY CONCERNS
The question is whether this structure can endure when water itself becomes uncertain.

Rice and wheat are largely anchored in irrigated ecosystems, while pulses, oilseeds and many millets continue to depend on rainfed regions. Vegetables, increasingly cultivated in peri-urban belts, rely heavily on groundwater and intensive input use. The result is a deepening dependence on irrigation and chemical inputs.

Inputs have changed the very nature



MILLETS. Hardy crop VENEKATACHARYA/TIC

of farming. Fertilizer consumption in India has risen from less than one million tonnes in the early 1950s to nearly 30 million tonnes today — a near forty-fold increase. The intensity of use has increased sharply alongside this growth. Pesticide use, while uneven across crops, is concentrated in certain systems — particularly vegetables grown in peri-urban belts. These inputs helped sustain productivity, but have also come at a cost to soil health, groundwater quality and food safety.

Meanwhile, agriculture continues to sustain millions of smallholders, yet farm incomes remain uncertain with rising input costs, climate change and opaque markets. NSS data are sobering: in the 59th round, 40 per cent of farmer households said that, given a choice,

they would take up some other career, and 27 per cent said farming was not profitable. Food security measured in aggregate tonnes masks deeper stresses within the rural economy.

India's agricultural system works today. The question is whether it is resilient to shocks. With rising climate variability, erratic rainfall and growing pressure on land and water, even two weak monsoons could strain the cereal-centric systems that underpin food supply.

The Supreme Court has recently urged the Union government to incentivise diversification away from paddy and wheat, while the Union Agriculture Minister last year announced expanded pulses procurement to strengthen domestic production.

These signals point to a pragmatic path forward: not to undo the gains of the Green Revolution, but to restore balance. Expanding institutional demand for millets and pulses through public distribution systems and school meals can provide predictable markets for farmers. Reorienting fertilizer subsidies towards balanced nutrient use, along with stronger processing and value chains, can make diversification both viable and sustainable.

The writer is former Deputy Managing Director, Nabard. Views are personal

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

Vijay's challenge

Stardom to statecraft is not a seamless ascent but an arduous stripping of certainty, where visibility must yield to institutional discipline. The Editorial rightly places Vijay at this delicate inflection point, where electoral prominence is no longer sufficient to command governance. Falling short of the absolute majority mark of 118 seats, he is pushed into a political landscape where authority is no longer singular but assembled. In such circumstances, numbers cease to be mere arithmetic and become the grammar of survival.

The way forward lies in recalibrating alliances as instruments of governance rather than extensions of electoral appeal. Their durability will depend on shared administrative intent — employment creation, infrastructure delivery, welfare execution, and continuity of governance. Equally critical is internal coherence. A fragmented internal voice weakens external credibility, discipline within becomes the precondition for persuasion outside. Ultimately, the transition demanded is psychological: stardom centralises

attention, while statecraft diffuses responsibility. Between the two lies the difficult art of converting personal appeal into collective trust and electoral momentum into durable governance.

Vijay Singh Adhikari

Nalaita (Gurukhand)

Storm persists

This refers to the article 'Epic Fury ends, but geopolitical storm is not over' (May 8). Though Operation Epic Fury appears to be ending, the geopolitical turbulence surrounding the US-Iran

conflict is far from over. A breakthrough in negotiations could calm global markets and ease fears over disruptions in the Strait of Hormuz.

However, concerns over energy security and fractured geopolitical alignments continue to weigh on the global economy.

PV Prakash

Mumbai

Luring deposits

This refers to the news report 'Bulk depositors cash in on banks' need to raise resources to meet credit

demand' (May 8).

Public sector banks should offer progressive and diversified interest rate system for households and firms to attract deposits which can be lent as credit to various sectors. It is really heartening to note that interest rates on one-year bulk deposits (of public sector undertakings, temple trusts and companies) of ₹3 crore and above in banks have gone up to about 7.5 per cent now and also their credit growth considerably. They should keep the momentum going.

S Ramkrishnaswamy

Chennai



A thought for today

A sad soul can kill quicker than a germ

JOHN STEINBERG

Chief Message

Suvendu, Vijay have particularly tough jobs to do

There was a meme doing the rounds that Bengal's waiting a resignation letter, Tamil Nadu's waiting an appointment letter, and Kerala's waiting to see who's appointed. Now one is done - Suvendu Adhikari, front runner for Bengal CM's post, has the job. The second is on the boil - Vijay is Tamil Nadu's CM-designate, with support from Congress's 5, CPI's 2, CPM's 2 and others, taking the total, with his party's 107 seats, to over the halfway mark of 118. The third's still work-in-progress, some Tweedledum Tweedledee, as Congress tosses and turns on netas names and Delhi-Kochi games.



Adhikari's primary task, and challenge, is to ensure peaceful transition in the days ahead, as he grapples with dismantling a political infrastructure shaped by a culture of political violence. The mandate for BJP was a vote for change, an anti-incumbency vote. How that is imagined in terms of jobs, education, health infra, will be key. Peace and stability are essential if investors are, at last, to hop on to the Howrah Express.

As for Tamil Nadu, investors are holding their breath. It's never quite done, until CM is in the chair. And sometimes, even then, it still isn't done. As debutant Vijay is finding out. Governor, controversially, had put him to the primary test - get the numbers. Now that he has passed that, he must pass a floor test, vote of MLAs' confidence, which, sometimes, can be slippery, going by experience across states. Once Vijay has the House's confidence, he'll need to get down to, what is, any minority gov't's primary task - consensus building and collaboration, to turn the wheels of good governance. Leading a minority gov't is hard work, never done and dusted. A tough challenge for political veterans - for a newbie, it's truly baptism by fire.

Germ War

Hantavirus a nudge to test our pandemic readiness

A cruise ship has become the scene of a deadly virus outbreak, and everyone's on edge. Is another pandemic starting? No. Hantaviruses - there are many types - mostly don't spread human-to-human. Also, unlike Covid virus, which was 'novel' or new, Hantaviruses have been around forever, sickening and killing humans across continents. That said, the virus strain that caused the MV Hondius outbreak is different. It's the 'Andes strain' that, according to WHO, shows "limited transmission capability between humans". That's how eight suspected cases - five confirmed - and three deaths have occurred. It's also a far deadlier strain, capable of killing up to half of infected persons.



Any place with rodents - rats, mice - can have an outbreak, and India's had some. Warehouse workers, who come in contact with rodent urine, droppings and saliva, and rodent catchers, like TN's Irula tribe, are especially susceptible. As far as the ship outbreak with Andes strain is concerned, no case has been detected in India so far. But since exposed persons may not show symptoms for up to six weeks, we should be on our guard. Contact tracing the ship's passengers is the first line of defence. After that, it's time to put our Covid learnings to use. Niti Aayog in 2024 said that the first 100 days of an outbreak are most crucial. We are still in those first few weeks of our epidemiological surveillance on, is the integrated health information platform active? And when are we planning to enact the proposed Public Health Emergency Management Act?

A Science Of Infidelity? Apparently, It Exists

A psychologist points to brain's hidden architecture

In the 16 years since his divorce, glib Tiger Woods has publicly regretted cheating on his wife, Elin, umpteen times. "My regret will last a lifetime," he wrote in his 2017 book 'Unprecedented'. It might sound dishonest, knowing that Woods was a serial cheater, but if he's telling the truth, why did he cheat? Clinical psychologist Glenn Hutchinson has some answers in his book 'Unfaithful Minds: The Science and Psychology of Infidelity'.

Cheating is surprisingly common over a lifetime. A 1993 US survey found that only 3-4% of spouses had other sexual partners in a year. But by the time they hit 60 - per a 2006 survey - 28% of married men and 15% of women had cheated. Standard explanations, like a failing marriage, or overwhelming passion, fall when you encounter infidelity in happily married couples. Hutchinson says the real drivers of infidelity in these cases are hidden, not just from the cheated half, but also the cheater. They arise, in fact, from the brain's "hidden architecture".



We think of ourselves as consciously deliberating and choosing, but the mind does most of its processing entirely below the surface of awareness, says Hutchinson. For example, the brain's outermost layer, or cerebral cortex, is constantly categorising, evaluating, and responding to the world. That's how we form two types of attitudes to almost everything: explicit attitudes that we are aware of, and implicit ones, our back seat drivers. And the two attitudes can be contrary. "It's possible to have a positive explicit attitude toward your romantic partner but a very negative implicit attitude toward her or him, and in fact many people do."

We don't realise that our minds start forming categories of potential partners - attractive or unattractive, relationship influencers or good for a fling etc. - from an early age. These categories are unconsciously "stamped" onto our brains, and marriage doesn't erase them. And that can be a problem. "After a person gets married, their unconscious mind may not cease to automatically activate their 'good for a fling' category when they meet an attractive stranger."

Reawakening Bengal from civilisational slumber'

Defence minister & senior BJP leader argues his party's mission is to restore the greatness of true Bengali heritage

Rajnath Singh



"Hey nutan, dekha dik arbar, jamno prabho shubhokshon" - O new one, show yourself once more, in the auspicious first moment of birth. Rabindranath Tagore wrote these words as an invocation - a prayer to the perpetually renewing spirit of Bengal. It's traditionally sung on his birthday anniversary, honouring him and the joy of a renewal, an awakening that a birthday signifies. Tagore understood that this land does not simply change. It is continually reborn.

It's a happy coincidence that less than a week before the 156th birthday anniversary of Tagore, Bengal has witnessed a historic change. On May 4, BJP secured a historic victory in Bengal assembly elections. Yet, for BJP and PM Modi, this election was never merely a political contest. It was an opportunity to restore the lost glory of this great land, a civilisational calling that transcends electoral considerations.

Today, it's worth pausing, setting aside the noise of political argument to ask a deeper question: What is Bengal, truly? And what does it mean to restore her? To understand Bengal's present, one must first descend into her past - not the past of decades, but of centuries.

Long before Bengal became a byword for intellectual refinement, she was a holy land. In the 15th century, on the banks of the Ganga in Nabadwip, a young man named Nimal - whom the world would come to know as Chaitanya Mahaprabhu - began to sing. His kirtan was not merely musical. It was a social reform movement dressed in devotion. He embraced the unteachable, danced with the scholar, and declared that the name of the divine was available to all without the burden of any ascriptive identities. The Vaishnavism he ignited became the spiritual architecture of Bengal and Bharat's soul, joyous and inclusive.

Two centuries later, that same spirit found its worldly complement in the Baul tradition - wandering mystics who wore no caste, carried no scripture, and sang of "none manush", the man of the heart. Among them, more shrewdly than Lalon Fakir, a man whom no religion could claim and every tradition embraced. A Hindu or a Muslim? No one could tell, and need not have bothered. This syncretic genius was Bengali, an identity that can only be lived.

In the previous three centuries, Bengal did not merely participate in India's moral awakening - she anchored it. Raja Ramohan Roy looked at a society that had grown rigid and corrupt in its customs, and chose neither to abandon tradition nor to surrender to it blindly. He reformed it - fighting for sati abolition and insisting on looking within to resurrect oneself. Ishwar Chandra Vidyasagar carried that torch further, turning education into an act of liberation, especially for women.

Bankim Chandra Chattopadhyay gave the nation its first great novel, which included Vande Mataram, the war cry that would echo from the lips of freedom fighters for a century, and continues on every Indian's lips today. Bengal also gave India its first woman

a hungry man cannot be taught philosophy, that the goddess must be worshipped not in the temple but in the woman, in the poor, in the nation itself. This is what Bengal is. This what she has always been. And this is how PM Modi sees Bengal. Not looking back to become something else was, certainly not becoming any other alien land, but looking forward to reawakening Bengal from its civilisational slumber, and achieving her fullest potential.

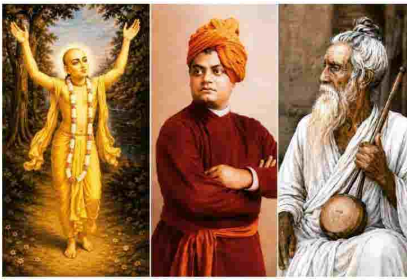
For too long, some sections of Bengal's intellectual and political class treated their own civilisational inheritance as an embarrassment - something to be transcended, explained away, or replaced with colonial ideologies. The result was decades of arrested development, institutional decay, and the silencing of those who dared to speak of dharma, of culture that did not contradict but completed Bengal's pluralist soul.

Bengal's election result shouldn't be seen merely as an electoral verdict. It represents a public mandate against those who distanced Bengal from its very roots and values. For PM Modi, this election was never a battle for power. It was a sacred endeavour - a 'yajna' to restore the lost glory.

PM Modi's deep affinity with Belur Math, his reverent nod to Swami Vivekananda, his framing of good governance as seva - service as a form of worship - these are not political statements. They provide Bengal with the impetus to recover her past glory and move ahead into a glorious and secure future. They are an example of a 'Pradhan Sevak' performing his 'Pradhan Dharma'.

To restore Bengal is to build world-class infra alongside the ghats where Chaitanya Mahaprabhu sang. It is to fund the schools that Ishwar Chandra Vidyasagar dreamt of. It is to build universities of eminence in the land which led India in education for centuries. It is to provide dignity to all tribal brothers and sisters of Bengal. It is to respond to the aspirations of the people of hilly areas, who have long suffered steeply discriminatory treatment at the hands of governing parties of Bengal.

Hey nutan. O new one - reveal yourself once more. This is the prayer with which the first BJP govt in Bengal, under the guidance of PM Modi and the blessings of each of Bengal's great daughters, will begin its 'seva' from now onwards. For a while, in the last half century, it looked as if Bengal's best days were past it. Today, she has been reborn, with the promise of a vibrant new life of prosperity and peace.



physician, Kadambini Ganguly, who inspired women towards self-reliance and freedom. Syama Prasad Mukherjee, a staunch nationalist, sacrificed his life for the unity of India.

Perhaps among all the extraordinary minds and great souls that Bengal has given birth to, Swami Vivekananda stands as the most radiant, enlightened, and electrifying mind. Swami Vivekananda, in his historic speech at the 1893 World's Parliament of Religions, introduced to the world the greatness of Hinduism, and called for religious tolerance and an end to fanaticism. But when he returned home, he told his own people something harder to hear - that spirituality without strength is sentimentality, that

Balcony Of Boundaries: Adjusting, Not Disappearing

That little place that looks out is a blessing. It doesn't make family storms go away. It isn't an exit. It's about finding one's emotional equilibrium. This can be the most loving thing to do in a crowded household

Shivakumar.Sundaram@timesofindia.com



The first thing Maya does every morning is open the balcony door. Not for the view. There isn't much of one - two buildings staring at each other like tired relatives at a wedding. Not for the breeze either. Mumbai's air is never quite sure whether it wants to be a breeze or a complaint.

Maya opens it because, in a one-bedroom flat where four adults and one teenager share the same walls, the balcony is not architecture. It is oxygen. A small sovereign neutral territory. A place where she can inhale without asking permission. Inside, the house wakes up in familiar instalments. The pressure cooker whistles. The teenager scrolls. Her father-in-law clears his throat, with the authority of a king whose kingdom has shrunk to a sofa. Rajan, her husband, becomes silent in the way some people become religious - not out of devotion, but out of habit and fear.

Then, almost reliably, a remark arrives. "You have made the sambar too watery," her father-in-law says, tasting breakfast like it is a referendum. "You never like anything," Maya replies, not loud, but sharp enough for the morning to change temperature.

"Why are you starting again?" Rajansays, which is not a question but a verdict. This is not necessarily a dysfunctional family. It is often just an Indian family loving deeply and arguing daily, and arguing its history like old furniture: heavy, inherited, and rarely moved. They adjust to each other. Not as a swallowing, but as boundaries. Boundaries not as walls, but as oxygen lines. They don't reduce love, only resentment.

The first boundary is space. Maya's family cannot create extra rooms. So they create small agreements. Maya gets twenty minutes on the balcony after breakfast - no questions, no instructions, no commentary. Rajan goes for a short evening walk with his earphones, his version of prayer. Their teenage son gets one hour in which no one asks about marks, mood, mobile, or

future. Her father-in-law gets his newspaper time without being corrected on politics, health, or cricket. These are not grand solutions. They are buffers. And buffers prevent irritation from becoming battle.

The second boundary is tone. One morning, when her father-in-law snaps at Maya over something trivial - salt, perhaps, or the way she folded a towel - she doesn't lose her equilibrium. Instead, she says, calmly, "I will talk to you, but not when I am being spoken to like this." No speech. No historical audit. No dramatic declaration that nobody respects her in this house. Just a line. Soft, clear, repeatable.

Many families keep having the same difficult conversation in the worst possible setting - late at night, hungry, exhausted, in front of children, or in the kitchen where ordinary objects begin to acquire dangerous symbolic value.

Maya and Rajan make a rule that first feels childish, then sacred: no serious conversation after 10 pm. Not



Her father-in-law grumbles. Rajan looks uncomfortable. The teenager pretends to be invisible. Maya walks to the balcony. This is the most important part. A boundary is not only what you say. It is what you do next. Sometimes, walking away is self-respect.

The third boundary is time. Throughout our early years, it is our mothers who help create a strong foundation for our lives; they teach us the art of loving humanity and the power of love to transform our lives. Through their actions, they teach us to coexist peacefully with everyone and to serve God's creation selflessly. The love we receive in our early years leaves a deep impression on us, and we remember these moments of our childhood no matter how old we become.

On Mother's Day, we should also remember, recognise, and be grateful to our spiritual master and God. We can draw a comparison between a mother's love for her child, a spiritual master's love for a disciple, and God's love for the soul. Just as a mother gives her child gains in the physical world, a spiritual master helps the disciple attain gains in spiritual worlds. They too, shower us with affection and sweetness, and impart the wisdom of inner worlds so that we may embark on the journey to our true Home. Likewise, God imparts wisdom and protection to our souls, ensuring we do not become entangled in activities of the outer world. Spiritual masters help us awaken to the oneness of all God's creation, exhorting us to live under the principle of love and to serve each other selflessly.

because problems vanish after ten, but because fatigue is a cruel advisor. Sleeping over a quarrel is not always avoidance. Sometimes, it is emotional hygiene.

The fourth boundary is repair. One morning, after a small argument, Rajan pases and says something he has rarely said in his marriage: "Can we start again?" It is a small sentence with a large effect. Repair is not a grand apology, not a "I was wrong. It can be a glass of water. A simple, "I did not mean that way."

The fifth boundary is loyalty. A sacred word, with two faces. At its best, loyalty says: "I will not abandon you in difficulty." At its worst, loyalty becomes: "I will abandon myself so you can remain unchanged."

In Indian families, loyalty often gets entangled with guilt. But mature loyalty has boundaries. You can love a parent and still say, "You cannot insult me." You can love a spouse and still say, "This behaviour is not acceptable."

When, after her father-in-law says something cutting, Maya simply says, "I am not available for this conversation," and steps out onto the balcony, she looks at the two buildings facing each other. No view. No romance. Just concrete, grills, drying clothes, and the ordinary evidence of crowded lives. But for the first time in many days, she feels something close to control over her inner weather.

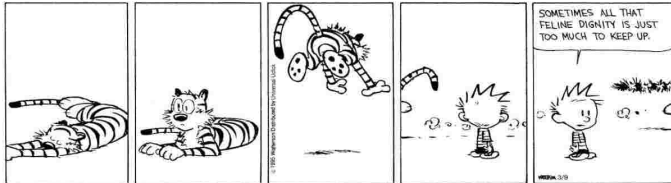
This is emotional equilibrium - not the absence of storms, but the ability to stop being swept away. Equilibrium does not promise that other person will be kinder or more forgiving. You will not become smaller. When exit is impossible, we stop asking only, "How do I change them?" We begin asking, "How do I design my response to them as a whole?"

Sometimes, the most loving thing one can do in a crowded home is not to hold everyone together with endless patience, but to hold one's own boundaries with quiet courage. That is not coldness. That is the balcony door opening. And in families like Maya's, that small opening is often how the whole house learns to breathe.

Of Life And Love

STORIES OF THE WAY WE ARE

Calvin & Hobbes



Sacredspace

Patriotism cannot be our final spiritual shelter; my refuge is humanity. I will not buy glass for the price of diamonds, and will never allow patriotism to triumph over humanity as long as I live. Rabindranath Tagore

On Mother's Day, Be Grateful To Your Guru And God

Sant Rajinder Singh

The second Sunday in May each year marks Mother's Day - a day to recognise, celebrate, thank, and honour our mothers and all mother-like figures in our lives. There is a deep connection between the love, help and guidance we receive from our mothers and gifts we receive from our spiritual master and God, our eternal Parent. The deeper meaning of Mother's Day is to not only honour our mothers for giving us life, but also to honour our true Parent, the Divine, who gave us life at all levels: physically, intellectually, and spiritually. Our soul, which gravitated away from the Supreme aeons ago, has been trapped in the wheel of transmigration, cycling through God's Creation and yearning to go

back to the Source. It is through the grace of God that we are given a human birth so our souls can find their way back to Him. Throughout our early years, it is our mothers who help create a strong foundation for our lives; they teach us the art of loving humanity and the power of love to transform our lives. Through their actions, they teach us to coexist peacefully with everyone and to serve God's creation selflessly. The love we receive in our early years leaves a deep impression on us, and we remember these moments of our childhood no matter how old we become.

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When we do so, we find that life becomes harmonious, calm, and peaceful. As we take steps in accordance with their teachings and put in time to meditate daily, we make steady progress on the journey back to God. As they reach their teenage years, children gravitate away from home and their parents in search of independence. Yet, after a while in the outside world, they come to recognise the love that surrounded them at home, and they yearn to return to their parents. It is no different with our souls, which gravitate away from God. This human birth is the soul's opportunity to return to its eternal Parent, and we must do all we can to make good use of the time we have by following the blueprint given to us by the saints and spiritual masters.



The Week That Was...
US, Iran trade fire again, stocks down, weekly gains trimmed

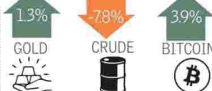
Equity indices fell on Friday as renewed US-Iran showdown pushed oil prices higher and hit weekly gains built on hopes of a near-term resolution and improved corporate earnings. Sensex closed with trimmed weekly gains of 0.5% at 71,728 and Nifty closed 0.7% up, at 24,176

Sensex
0.5%

Sensex Gainers

Mahindra & Mahindra	7.5%
Asian Paints	6.4%
Adani Ports	6.2%
TCS	-4.6%
SBI	-3.2%
Bharti Airtel	-2.8%

Laggards

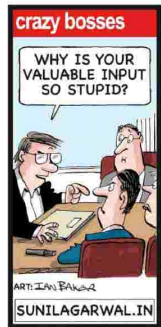


Was the record low that rupee touched on Tuesday, before closing at 95.28/\$. Stronger demand from corporates and rising crude oil prices early in the week weighed on sentiment.

Source: BSE, Reuters, screener.in

Swiggy losses up at ₹4.1k cr in FY26, revenues rise 51%

Bengaluru: Swiggy reported wider annual losses in FY26 even as its food delivery business posted its fastest growth in nearly four years. The company also signalled a more measured approach in quick commerce amid intense competition and discount-led expansion in the sector. The Bengaluru-based company reported a loss of ₹4,154 crore for FY26, compared with ₹3,117 crore a year earlier, while revenue rose 51% to ₹23,561 crore. For the March quarter, losses narrowed to ₹800 crore from ₹1,081 crore a year earlier and ₹1,065 crore in the Dec quarter. **TNN**



UC's InstaHelp losses widen amid rivalry

Bengaluru: Urban Company slipped deeper into losses as it sharply increased spending on its instant domestic services business. InstaHelp, to compete with fast-growing rivals such as Pronto and Snabbit. The company reported a consolidated loss of ₹161 crore in the March quarter, compared with a loss of ₹2.8 crore a year earlier, even as revenue rose 40% year-on-year to ₹462 crore. **TNN**

Kissoft shares jump 12% on mkt debut

Bengaluru: Shares of Mumbai-based digital lending platform Kissoft's parent OneMtl Technology Solutions listed at ₹191 on the BSE, nearly 12% above the issue price of ₹171. The stock opened at ₹190 on NSE and surged as much as 23% after the day to touch ₹227.4 before closing at ₹208.6, valuing the company at around ₹3,522 crore. **TNN**

Titan Q4 net climbs 35.4% to ₹1,179cr

New Delhi: Leading jewellery and watchmaker Titan on Friday reported a 35.4% increase in its consolidated net profit to ₹1,179 crore for the March quarter of FY26. The company posted a net profit of ₹871 crore in the Jan-March quarter a year ago. Its sales surged 48.3% to ₹20,607 crore in the March quarter of FY26. **AGENCIES**

Dip in gold drags reserves down

Mumbai: Foreign exchange reserves fell by \$7.8 billion to \$597.7 billion in the week ended May 1. The fall was largely concentrated in gold reserves, which declined by about \$5 billion to \$115.2 billion. Foreign currency assets, the largest component of reserves, fell by \$2.8 billion to \$551.8 billion. **TNN**

Redefine affordable housing parameters, banks teo govt

'Rising Ticket Sizes, Interest Costs Need To Be Considered'

TIMES NEWS NETWORK

Mumbai: Banks have asked govt to revisit the definition of affordable housing by revising property value and size thresholds to reflect inflation and changing requirements, as rising ticket sizes and interest costs render existing limits less relevant.

"We are the market leaders in housing finance and our home loan portfolio has grown by 13.7%. Our average ticket size has also gone up. The composition of affordable housing needs to change. This is what we have told govt," said CS Setty, chairman State Bank of India.

"With the passage of time, fixed limits lose their relevance. Today, it may not be possible to purchase a house within price thresholds that qualified as affordable 10 years ago. Ideally, these limits should be indexed to real estate prices," said Keki Mistry, chairman, HDFC Bank. "Similarly, Section 24(b) of the Income-Tax

WHAT IS AFFORDABLE HOUSING?

- Govt follows multiple definitions of affordable housing. Under Pradhan Mantri Awas Yojana (Urban), affordability is linked to income categories and house size.
- Economically weaker sections include households with income up to ₹3 lakh a year and house size up to around 30 square metre carpet area.
- Low income groups cover income between ₹3 lakh and ₹6 lakh with house size up to around 60 sq m.
- Middle income groups I and II include income between ₹6 lakh-18 lakh with larger size limits of up to around 160 sq m for higher categories.

RBI eases rules for banks to include quarterly profits in regulatory capital

Mumbai: The RBI on Friday eased rules for banks to include current-year profits in capital adequacy calculations each quarter by removing an additional NPA-linked condition. Banks can now add quarterly profits to CET1 capital for CRAR computation, subject to a prescribed formula and quarterly audit or limited review of financials. Similar norms apply to small finance and payments banks. **TNN**

Act provides for a deduction of Rs 2 lakh on interest paid on home loans. When this limit was set in 2014, it was significant; today it covers only a small portion of the average interest outgo," he added.

Currently, govt follows multiple definitions of affordable housing. Under Pradhan Mantri Awas Yojana (Urban), affordability is linked to income categories and house size. Economically weaker sections include households with income up to ₹3 lakh a year and house size up to around 30 square metre carpet area. Low income groups cover income between ₹3 lakh and ₹6 lakh with house size up to around 60 sq m. Middle income groups I and II include income between ₹6 lakh-18 lakh with larger size limits of up to around 160 sq m for higher categories.

SBI net profit rises 6%, share price tumbles 6.6%

Mumbai: State Bank of India reported a 5.8% rise in standalone net profit at ₹3,109.6 crore for the March quarter, as margins came under pressure and treasury income declined amid rising bond yields and subdued equity markets. The bank declared a dividend of ₹17.35 per equity share for the year ended March 31, 2026. Shares of the bank fell 6.6% to ₹1,019.60 on the BSE, compared with a 0.7% decline in the March quarter, as margins came under pressure and treasury income declined amid rising bond yields and subdued equity markets. The bank declared a dividend of ₹17.35 per equity share for the year ended March 31, 2026. Shares of the bank fell 6.6% to ₹1,019.60 on the BSE, compared with a 0.7% decline in the March quarter, as margins came under pressure and treasury income declined amid rising bond yields and subdued equity markets. **TNN**

REPORT CARD

- Net interest income rose 4.1% to ₹44,380 crore despite 16% credit growth, as net interest margin compressed by 0.2% to 2.9%.
- Non-interest income fell 29% to ₹19,314 crore due to a treasury loss of ₹1,471 crore and a 36% decline in foreign income to ₹1,258 crore. External factors affected other income by around ₹4,500 crore, while regulatory changes in forex had a limited impact of ₹57 crore.
- Record profit for BOB Bank of Baroda, on the other hand, reported a record net profit of ₹5,616 crore for Q4 FY26, up 11% from ₹5,048 crore a year ago, driven by higher net interest income and lower tax provisions, while full-year profit crossed ₹20,900 crore to reach ₹20,021 crore, a growth of about 2.2%.
- BoI profit rises 18.7% Meanwhile, Bank of India's Q4 FY26 consolidated net profit rose 18.7% to ₹3,087.8 crore while standalone profit increased 14.9% to ₹3,055.8 crore. Net interest income grew 11% to ₹4,730 crore, and NIM stood at 2.6%. The bank expects FY27 NIM at 2.7-2.8% despite cost and inflation headwinds.

No layoffs, hikes deferred by at least a qtr: AI mgmt

New Delhi: In a morale booster for employees, loss-making Air India on Friday said it does not anticipate any layoffs even as the airline has had to further lengthen closure of Pakistan airspace during which cost-cutting measures were executed as the airline has lost over ₹22,000 crore last fiscal due to multiple factors, including closure of Pakistan airspace

AI had about 1,200 daily flights. It has cut about 100 of them due to the escalation in operating costs

since Operation Sindoor, then the tragic Ahmedabad AI 171 crash, the US-Iran war that has led to further lengthening of western routes along with a sharp hike in jet fuel prices and the rupee crashing. Sources say the issue of Wilson's successor was not finalised during Thursday's board meeting. The CEO reportedly said AI will proceed with variable pay for FY26, continue with planned promotions while annual increments will be deferred by at least one quarter due to current uncertainty. "We don't anticipate layoffs," Kumar said.

Wilson stressed on the need to cut costs. He urged employees to suspend discretionary spending and negotiate rates where feasible, and defer non-critical expenditures. "There must be a laser sharp focus on eliminating wastage and leakages," he said.

Wilson said while AI wasn't expecting a profit last fiscal, the actual losses were more than what it had anticipated.

Health share in non-life industry climbs to 41%

Segment Grows 15.4% To ₹1.4L Cr, Standalone Insurers Account For 33% Of Total Premium

TIMES NEWS NETWORK

Mumbai: Health insurance is steadily increasing its dominance in India's non-life insurance industry, with its share rising to 40.8% in FY26 from 38.6% a year earlier. Health as a segment grew 15.4% to about ₹1.4 lakh crore, even as the non-life industry grew 9.3%, with total gross direct premium income reaching nearly ₹3.4 lakh crore in FY26.

Stand-alone health insurers accounted for 32.7% of the total health insurance premium, underwriting ₹4,463.7 crore out of the industry's total health premium of ₹13,714.5 crore. The top five insurers in the health segment were New India Assurance with ₹2,531.5 crore and 15.7% market share of health, followed by Star Health & Allied Insurance with ₹1,845.9 crore and 13.4% share. Care Health Insurance followed with ₹9,768.4 crore (7.1%), ICICI Lombard with ₹8,617.3 crore (6.3%) and Niva Bupa Health Insurance with ₹8,478.7 crore (6.2%). Stand-alone health insurers outperformed the broader industry with growth of 19.4%.

The expansion in health insurance anchored the industry's performance, while other segments showed mixed trends. Motor insurance, the second-largest segment, saw its share remain largely unchanged at 32.2%, with premiums at about ₹1.1 lakh crore and growth of 9.2%. Fire insurance increased its share to 9.2% from 7.9% with premiums of ₹2,752.3 crore and growth of 13.4%. Personal accident insurance recorded the fastest growth of 35%, raising its share to 3.5% from 2.4% with premiums of ₹1,160.7 crore. Engineering grew 13.1% to ₹6,801.5 crore with a 2% share, while liability remained stable at 1.8% with premiums of ₹3,969.3 crore and growth of 9.6%.

Zepto gets Sebi's nod for \$1bn IPO

Mumbai: Zepto's \$1 billion IPO is a step closer to hitting Dalal Street with markets regulator Sebi giving it a go-ahead for the issuance, details published on the website of the company which rivals Eterna's Blink and Swiggy Instamart in India's \$10-11 billion quick-commerce market. Zepto is targeting a listing sometime by July, said people in the know. Zepto declined to comment. The bulk of the IPO, it is understood, will be through a fresh issue of shares.

The startup, last valued at \$7 billion had filed for IPO through the extended route in Dec last year and will now file updated papers in about six-eight weeks, sources said. Zepto, which will join two of its listed competitors in heading to the bourses amid war-battered volatile markets which pushed its fintech peer PhonePe to pause its \$1.3 billion IPO. **TNN**

Hyundai lines up ₹7,500cr capex for FY27

New Delhi: Hyundai Motor India on Friday said it has lined up ₹7,500 crore for capex for FY27 and started two new models, including a mass segment electric SUV, for launch this year, as it seeks to regain the number two position in the domestic passenger vehicle market.

The company expects domestic sales to grow by 8% in FY27, along with a similar volume growth for exports, HMI in managing director & CEO Tarun Garg told reporters in an earnings call.

Meanwhile, the auto major reported a 22.2% decline in consolidated net profit to ₹1,255.6 crore in the March quarter, impacted by higher commodity prices, unfavourable product mix and costs associated with capacity stabilisation. **AGENCIES**

NON-LIFE INDUSTRY GROWS 9.3%

Industry (In Decreasing Order Of Mkt Share)	Total Gross Direct Premium Income (₹ Cr)	% Growth
Health	1.2	14
Motor	0.1	11.4
Misc	0.4	0.3
Fire	0.2	0.3
Personal Accident	0.1	35

*Crop Insurance + Credit Guarantee+ All other misc | Source: General Insurance Council

Marine insurance saw its share decline slightly to 1.7% from 1.8%, with premiums of ₹5,819.5 crore and growth of 5.7%. Aviation premiums stood at ₹1,089.3 crore, with a marginal contraction of 0.8% and a reduced share of 0.3% from 0.4%. The miscellaneous segment declined sharply by 17.6%, with its share dropping to 9.5% from 12.6% and premium of ₹53,931.1 crore. Among insurers overall, New India Assurance retained its leadership with a market share of 12.8%, up from 12.6%, and growth of 10.9%. ICICI Lombard held the second position with a share of 8.6% and growth of 7.0%. Bajaj Allianz followed with a 6.9% share and growth of 10.9%. United India Insurance reported a 6.4% share with growth of 6.7%, while Oriental Insurance rounded out the top five insurers with a 6.2% share and growth of 4.6%.

Britannia: Rising fuel costs weighed on growth in Q4

Bengaluru: Britannia Industries said higher fuel and freight costs linked to the West Asia conflict, along with disruption in wheat channels following GST-related pricing changes in the biscuit market, weighed on growth during the March quarter, prompting the company to initiate editorial price hikes and cost-control measures.

The maker of Good Day and Marie Gold biscuits reported consolidated profit of ₹67.9 crore for the quarter ended March 31, up 21.6% from ₹59.1 crore a year earlier. Total income rose 6.2% to ₹4,774.4 crore from ₹4,495.2 crore. For FY26, total income increased 6.6% to ₹19,375.6 crore, while profit rose 16.5% to ₹2,557 crore.

On the cost-impact analysis call, managing director and chief executive Rakesh Hargave said Britannia's domestic business was growing at 9.5% before moderating in March when the company faced disruption in international operations linked to the West Asia conflict.

Britannia said its international business was impacted by vessel shortages and slower regional demand, while fuel costs and expansion of wheat supply following disruption of the Strait of Hormuz.

They have begun shifting part of their export-oriented production back to the Mundra facility to reduce dependence on West Asian shipping routes and laminate costs had turned inflationary. Britannia said it would undertake calibrated price increases and grammage adjustments from the current quarter to offset input costs that are rising.

Management also pointed to temporary disruption in wholesale and rural channels as some biscuit makers introduced interim Rs 4.5 and Rs 9 packs following the GST rate reduction, while Britannia retained its Rs 5 and Rs 10 packs, which account for a large share of industry sales.

Tata Trusts postpone board meet to May 16

Mumbai: A day after Bombay high court cleared the way for the board meetings to proceed, Tata Trusts and the Sir Dorabji Tata Trust postponed them to May 16. A key agenda was to review nominee directors for Tata Sons, in which the two trusts hold a controlling stake.

Among the trustees, chairman Noel Tata and vice-chairman Venu Srinivasan serve as nominee directors on the Tata Sons board. The two are at odds over a potential public listing of the company, with Srinivasan in favour and Noel opposed.

Srinivasan and Vijay Singh had logged in virtually for the 9am meeting, while Jehangir Jehangir and Bhaskar Bhat had travelled to attend — the former from Pune the latter from the latter flying in specifically for the meeting. They were informed at the eleventh hour that the meetings had been postponed. A communiqué from the Tata Trusts chief executive announced the new date. The two trusts typically hold separate meetings but had planned a joint session on this occasion. Corporate lawyer Swapnil Kothari blamed the development on "rival factions" divided on crucial decisions like the public listing of Tata Sons and the reappointment of company chairman X Chandrasekaran. At the Tata Sons board meeting held in Feb, Chandrasekaran's reappointment for a third term was defeated. Srinivasan supporting his continuation while Noel raised objections.

India emerging as a hub for app innovation: Apple

Aabhas Sharma @timesofindia.com

New Delhi: Blind users struggle with navigating unfamiliar indoor spaces, reading signs or understanding visual cues. And, most people take this for granted. This problem is being tackled by Apple's New Delhi-based developer community. Aabhas Sharma, a student at Chitkara University on the outskirts of Chandigarh, to build Blind Bridge, an accessibility-focused app that aims to make everyday navigation easier for visually impaired users. His app uses intuitive vibration-based sensing and earned Sharma a place among the distinguished winners of Apple's Swift Student Challenge 2026 — one of seven winners from India selected this year.

India-Based Developers' Global Earnings Treble

- More than ₹45,000 crore seen in App Store billings and sales in India in 2024
- Around 75 million+ global downloads of apps developed in India in 2024
- 80% of Indian developers' earnings came from users outside India
- 17,000+ developers are associated with Apple's Developer Center in Bengaluru
- 1 million jobs created around Apple's app developer ecosystem in India
- India-based developers' global earnings tripled over last five years

developer markets, driven by a mix of global ambition, entrepreneurship and student participation. "It's been really exciting to see a big developer community in India now, that is still growing rapidly," Prescott said. "What's interesting is the global nature of what developers are doing in India. Many

developers want to create impact locally, but also take advantage of the global reach of the App Store." That global reach is becoming increasingly important for Indian developers. According to an Apple-backed study released in April, the App Store ecosystem in India facilitated ₹44,447 crore in billings and sales in 2024, while global earnings of India-based developers have tripled over last five years. Close to 40% of earnings generated by Indian developers now come from users outside the country. More than 17,000 developers had been associated with the Developer Centre in Bengaluru. Back in 2023, Apple had claimed that one million jobs had been created around the developer ecosystem in India. These numbers, however, look small com-

pared to China. There are reportedly close to two million iOS developers in China whereas the number of developers in India is also ten times higher than that of India. However, Apple says the App Store ecosystem now spans 175 storefronts globally, allowing Indian developers to scale internationally far faster than before. In 2024 alone, apps developed in India were downloaded more than 75 million times worldwide through the App Store. A key part of Apple's India push has been the Apple Developer Center, where Apple engineers work directly with developers. Prescott said the centre has become an important hub not just for technical guidance, but also for fostering a sense of community among developers.

'Google eyes investments in AI infra, drone mfg in India'

TIMES NEWS NETWORK

Bengaluru: Google is exploring investments in India, spanning artificial intelligence infrastructure as well as server and drone manufacturing, Union IT minister Ashwini Vaishnaw said on Friday, signalling possible expansion of the tech giant's ambitions, beyond cloud and startup initiatives. "Google is exploring investments in India across AI infrastructure and the manufacturing of servers and drones," Vaishnaw said in a post on X after meeting Google executives. The reference to manu-



facturing is significant as Google's India investments have been largely centred on cloud, AI, skilling and startup ecosystem programmes rather than local hardware production. The development comes months after Google Cloud announced what it described as its largest India investment to date — a proposed \$15-billion investment between 2026 and 2030 to establish its first AI hub in India at Visakhapatnam. The project includes gigawatt-scale data centre operations, expanded

factory infrastructure and AI compute capacity. Google has also intensified its India-focused AI ecosystem efforts through startup accelerators and developer programmes. On Friday, Google and Antler India launched "Google for Startups Immersion," a programme aimed at founders and technical leaders building AI-led companies with live products and early traction. Separately, Google opened applications for the third cohort of Google Play Accelerator India, an equity-free initiative for AI-powered app and gaming startups.

Opinion

SATURDAY, MAY 9, 2026

Rethinking outward FDI

Overseas investments must become more broad-based than just a few destinations

THE WHYS AND whereof of India's rising outward foreign direct investments (OFDI) warrant closer examination. At one level, they reflect the fact that "in order to sell on those markets, you have to be present there", as was noted by Chief Economic Advisor V Anantha Nageswaran. But he added that it was paradoxical that uncertainties abroad were not coming in the way of higher OFDI while there were untapped opportunities at home. The global expansion of India's conglomerates, however, is not of recent provenance as in the late 1960s and 1970s the Aditya Birla Group made pioneering forays into Thailand and other economies of the Association of Southeast Asian Nations (ASEAN), the first pre-liberalisation wave of OFDI. Post-liberalisation, the Tata Group acquired Tetley Tea in 2000, Anglo-Dutch steel manufacturer Corus in 2007, Jaguar and Land Rover in 2008.

The big factor of change is that the composition of OFDI has shifted from manufacturing to financial services from FY21 to FY26, according to a business daily. Over a longer period as well, this shift is borne out in a report of the Centre for WTO Studies and Confederation of Indian Industry on "India's outward foreign direct investment". The manufacturing-led OFDI phase noted earlier petered out due to tighter financing conditions in the post-global financial crisis period. There was a rapid rise thereafter of OFDI in financial, insurance, business, and professional services, reflecting India's structural evolution to a knowledge-based economy. While manufacturing's share fell to 23.2% of OFDI in 2023 from a high of 51.9% in 2009, financial and business services have driven India's OFDI, accounting for 37.4% of total outflows from 15.5% in 2009.

India's rising OFDI is also highly concentrated in a few low-tax jurisdictions like Singapore and Mauritius. As for the city-State, it would be tempting to infer that India's investments are a base to foray into the rest of ASEAN. But that does not seem to be the case as the bulk of foreign investments into India from ASEAN are also from Singapore. The two-way flows of investments between India and Singapore have in fact led researchers to investigate whether there is round-tripping. India Inc has not followed the footsteps of the Aditya Birla Group with the Tata Group even exiting from its manufacturing presence in the region. India's OFDI in Singapore shows a receding manufacturing footprint while it is sharply rising in finance and insurance through mergers and acquisitions to harness the bustling business opportunities of the city-State that is a leading global hub of technology and financial services.

Policy intervention is certainly needed to ensure that rising OFDI is more broad-based than being driven by conglomerates and concentrated in low-tax jurisdictions. Top officials earlier indicated to FE that the government wants to create more multinational corporations (MNCs). India Inc is being encouraged to set up permanent rather than camp offices to pursue tenders in countries where they see opportunities. While a presence is necessary to sell more in markets, OFDI need not be the expense of investing domestically. When companies invest overseas, they keep a buffer, as a result of which their domestic investments are bound to remain stagnant. The rationale behind the creation of MNCs is not only that they would see returns in terms of dividends and royalties coming in by the 2030s, but also create more two-way trade flows.

China will parry if digital dollars corner savings

THE RIVALRY FOR the money of choice in the 21st century is heating up. Now that the regulatory stalemate in the US over whether exchanges should reward stablecoin users is nearing resolution, China may promote its digital yuan in emerging markets that are most likely to get dollarised.

Last year's Genius Act, the law under which the private sector will offer 1:1 representations of the dollar, prohibits stablecoins from sharing with customers the income earned by their issuers on assets backing the tokens. But banks also wanted a total ban on third-party rewards to prevent a flight of deposits, while crypto firms argued such a move would kill innovation. It looks like a way out of the impasse has been found.

The stakes are high. Last year, Coinbase Global, the No. 1 US crypto exchange, earned nearly a fifth of its revenue, or \$1.35 billion, from stablecoins. Most of it came from its partnership with Circle Internet Group, with Coinbase paying out hundreds of millions in rewards to customers who use Circle's USDC tokens. These are small numbers, but once the dollar clones are regulated, their usage is expected to explode.

This is problematic for Beijing. A recent Bank for International Settlements working paper warns that dollar stablecoins could emerge as a store of value in emerging markets, especially if they were to pay a yield. For residents facing currency depreciation or financial instability, a tokenised greenback that offers return through rewards is practically a shadow dollar deposit held outside the banking system.

Anything that trenches the US currency's hegemony in countries like Pakistan, Sri Lanka, Turkey, Egypt, or Sudan goes against China's strategic interest.

Which is why Beijing may feel compelled to give them an alternative. If the e-CNY can offer a clean interest rate and a sovereign safety net via the People's Bank of China, it may compete as a store of value in the very emerging markets that US issuers will be looking to capture.

The newly minted compromise on the Clarity Act, the market-structure law that will complement the Genius Act, comes after a period of intense lobbying. The text, as it now stands according to media reports, bans passive interest payments by exchanges. But it explicitly preserves rewards tied to bona fide activities like payments and trading. It remains to be seen if the activities will be incentives that look like yields.

to users, allowing US firms to export dollar-denominated savings products to the world. That could lead to a migration of deposits away from local banks in emerging markets into private tokens backed by US Treasury bills. Washington gets to finance its deficit through the savings of the global working class, while private firms like Circle and Coinbase take a cut. This is privatisation of seigniorage, an Old French word for the right of the sovereign to mint money and tax the public for using it.

China has already done the groundwork for this eventuality. Starting in January, it effectively handed over the state-backed digital yuan to local commercial banks. The e-CNY is now treated as their liability, on which they will pay interest just like they do to regular depositors. By doing that, Beijing is putting up guardrails against digital dollars that might otherwise lure away Chinese households.

But a domestic moat can only win half the battle. To prevent a sweeping dollarisation of its trade partners, Beijing must now play offence. Its most powerful tool for traditional finance is the rapidly growing Cross-Border Interbank Payment System, or CIPS, which settles international trades in yuan, not dollars. Volumes on CIPS surged after the start of the war in Iran.

For tokenised claims, though, China offers the e-CNY as the primary payment instrument on the bridge. Transaction volumes last year swelled to 2,500-fold over the pilot phase of the blockchain platform shared by a coalition of energy powers and the country's neighbours. Beijing views its bridge as an alternative to a US-led digital financial order. By offering a yield-bearing e-CNY that settles instantly across borders without touching the SWIFT messaging network, the People's Republic is giving Belt-and-Road countries a way to pass the dollar tax.



ANDY MUKHERJEE

Bloomberg



A NEW LEASE

Union Civil Aviation Minister Ram Mohan Naidu

The scale of the global aircraft leasing market, and particularly the India-related portion of that market, is large enough to accommodate multiple private sectors across the world

TRADE TALKS

IMPETUS FROM EU AND US TO THE IDEA OF RECIPROcity IN PLURILATERAL NEGOTIATIONS HAS QUEERED THE PITCH

The consensus hurdle in WTO

THE RECENT BIENNIAL WTO ministerial at Yaounde ended in an impasse yet again. There was no consensus on the proposal to extend the moratorium on customs duty on electronic transmissions, which was on the agenda. In frustration, the US ensured that no other issue was taken up and the meeting concluded without an outcome.

The failure at Yaounde underlines the predicament faced by WTO members in trade talks. Decision by consensus is a legacy of the General Agreement on Tariffs and Trade (GATT) 1947 days and difficult, if not impossible, to change. Although rules allow recourse to voting if consensus is not achievable, members are loathe to opt for this alternative on matters relating to trade negotiations. Developing countries attach importance to the consensus rule as it provides them with an important safeguard against action to impose new obligations on them without their consent.

On the other hand, on account of the diversity in the economic situations of member countries, the difficult reality is that consensus is difficult to achieve. This was the main reason for the collapse of the Doha Round in 2008, and is the principal cause for the halting progress in multilateral negotiations since then. There is recognition that rules on decision-making are a serious hurdle in undertaking trade negotiations and the issue is listed on the agenda of future talks on WTO reform. In the preliminary discussions, the most promising solution that has emerged is that of plurilateral negotiations, by which the consensus problem is sidestepped. A group of major stakeholder countries willing to go ahead with a trade policy initiative concludes a plurilateral agreement, leaving others to join when they are ready. The idea is not new—it is rooted in past practice.

The first notable instance in the GATT 1947 days of an agreement among a lim-

ANWARUL HODA

Honorary Professor, ICRIER



ited number of parties was the 1960 adoption of a declaration by 14 West European and North American countries to prohibit the use of export subsidies on non-primary goods (manufactures). This declaration was effectively a plurilateral agreement among industrialised countries that constituted a subset of parties to GATT 1947. Non-participating developing countries got the benefit without undertaking the obligations of the agreement.

The biggest set of plurilateral accords emerged from the Tokyo Round of multilateral trade negotiations in 1979, when developed countries and selected developing countries (including Brazil, India, Korea, and Yugoslavia) became parties to plurilateral agreements on five non-tariff measures—technical barriers, import licensing, subsidies and countervailing duties, anti-dumping, and customs valuation. These agreements were initially referred to as Codes to distinguish them from multilateral instruments. Negotiations in these areas had commenced with the aim of developing multilateral instruments but at the end of the Round, it became evident that the majority of developing countries were not ready to adopt the higher level of obligation envisaged in the Codes. Adoption of the accords on a plurilateral basis was the pragmatic way out.

Within five years of the establishment

of the WTO, there were as many as three plurilateral agreements within its purview—the Information Technology Agreement (1996), the Telecommunications Agreement (1998), and the Agreement on Financial Services (1999). The Agreement on Expansion of Trade in Information Technology Products (2015) followed and the latest addition is the Agreement on Services Domestic Regulations (2024). The participants in these agreements

were subsets of WTO members whose cumulative trade share was deemed to constitute a critical mass, enabling them to go ahead.

Past practice on plurilateral agreements has three notable features. First, although all of them began as agreements among a subset of GATT parties or WTO members as signatories, adherence was kept open to all. Second, benefits were extended to the most-favoured nation (MFN) basis to the full membership of the parent agreement, irrespective of whether any of them was a signatory to the plurilateral agreement. It was the non-discriminatory nature of liberalisation that made plurilateral agreements the driving force for the liberalisation of trade in the WTO's early days. Third, to minimise free riding, the practice evolved to require a critical mass of WTO members to become participants before the plurilateral agreements entered into force.

Given the imperative of unlocking the process of trade negotiations on the one hand, and the challenge of decision-making by consensus on the other, recourse to the customary practice of non-discriminatory plurilateral negotiations appears to be the only way forward. The impetus given by the EU and even more by the US to the idea of reciprocity in plurilateral negotiations has, however, queer the pitch. Viewed together with the separate proposals of these major players for a rethink on the MFN principle, plurilateral agreements based on reciprocity raise the spectre of the trading system fragmenting into clusters of bilateral agreements that are governed not by rules but by power play.

Plurilateral agreements based on reciprocity raise spectre of the trading system fragmenting into clusters of bilateral deals

Financing India's silver wave



RAJIT MEHTA

MD & CEO, Antara Senior Care

FOR A MAJOR part of India's modern history, its identity has been firmly rooted in the definition of a young nation—one with a growing workforce and enviable demographic dividend. This reality is shifting as we speak and will change completely within the span of a generation.

By 2050, the population aged above 60-plus years is projected to more than double to about 350 million. One in every five Indians will be a senior citizen and the 80-plus population will have shot up by 279% (UNFPA) on the back of higher life expectancy facilitated by better healthcare. But unfortunately, this will also be accompanied by a higher burden of chronic conditions needing continuous care. Nearly 75% seniors have at least one chronic illness, 40% require assistance with daily activities, and 15% experience cognitive decline, and 35% face mental health challenges.

At a macro level, this means that our models, structures, frameworks, and approach to caring for the elderly and particularly how this care is funded must be reconfigured and reimaged.

Ageing is not a one-time event like an acute illness—it is a gradual decline that may or not come with disease. It is a journey that demands planning, continuous care, and financial resilience.

As we age and move through various phases of ability, we need preventive care, assistance with activities of daily living (ADL), rehabilitation, assisted living services at home or in a home, and transition care. India's traditional hospital-centric healthcare model, though covered by insurance, is designed around

acute illnesses. Currently, it does not meet long-term care needs and the standard health insurance policy does not cover ageing-related care despite established benefits. Consequently, families in India bear over 75% of senior care costs out-of-pocket, depleting their savings, compromising quality of life, and burdening caregivers.

This paucity of financial solutions, particularly insurance, has created care gaps.

As India ages, we urgently need a financing ecosystem that can support lives that are not just longer but dignified.

For generations, caregiving responsibilities were absorbed within households. This traditional care economy functioned as India's default senior care infrastructure. However, today, nearly 70% of urban households are nuclear.

Simultaneously, the expectations of seniors themselves are evolving. A new generation is getting older and is increasingly seeking to maintain its independence, autonomy, and state of empowered living. They are exploring structured support systems that offer safety, social engagement, and professional care outside the family construct.

Given their need for financial predictability and independence, people are increasingly planning ahead, ensuring that they can access quality care in their retirement years without placing financial strain on their families. Retirement

targeting all assume some degree of predictability in crude markets. That predictability is now at risk. The government will do well to accelerate strategic petroleum reserve expansion and deepen bilateral supply agreements with diversified producers. Energy security cannot wait for global coordination mechanisms to emerge organically. The transition will be judged, as the article rightly notes, not just by how clean it is but by its stability.—Abharna Barathi, Chennai

focused mutual funds have grown, with assets under management increasing by 226% over five years.

These figures indicate a financial readiness that is not met with fully developed financing infrastructure. But early signs of progress are evident. Regulators are pushing for universal coverage, and insurers are exploring senior-focused health plans and retirement-linked financial solutions. These developments signal a growing recognition of the scale of India's ageing transition. However, most of these innovations remain limited in scope, and still largely centred around hospitalisation rather than the broader continuum of care that ageing requires.

A key barrier to progress lies in regulation. Assisted living homes (ALHs), which play a crucial role in delivering structured, long-term senior care, currently lack formal recognition within the Insurance Regulatory and Development Authority of India (IRDAI) framework. This absence of regulatory classification prevents ALHs from being integrated into insurance-backed financial mechanisms. As a result, even where care infrastructure exists, it remains inaccessible to many seniors due to affordability constraints. As IRDAI strengthens efforts towards its goal of "universal insurance coverage by 2047", a key step will be to incentivise insurance products that match people's life-cycle needs, particularly for their silver years.

Addressing this regulatory gap is essential. Formal recognition of assisted living and long-term care services would allow insurers to design products that cover non-hospital care, including daily assistance, rehabilitation, and supervised living environments. This would shift senior care from an out-of-pocket expense to a pooled risk model, making quality care more predictable and financially viable for families.

Bringing about this shift requires partnerships among insurers, care providers, government agencies, and advocacy groups to design products that address both medical and non-medical care requirements. Through pilot programmes, insurers and care providers can refine product features, pricing, and claims processes based on real-world feedback and outcomes.

Insurance-backed models can play a transformative role in making senior care more accessible. This shift can also encourage families to opt for preventive and supportive care earlier, improving health outcomes and lowering long-term healthcare costs.

The opportunity is therefore both social and economic. Implementing comprehensive insurance solutions for assisted living creates a win-win scenario for all stakeholders. Seniors and their families gain peace of mind and financial protection, while insurers tap into a growing market with tailored products. Care providers benefit from enhanced service standards and increased demand and policymakers can ensure better social outcomes for India's ageing population.

—NR Nagarajan, Sivakasi

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LETTERS TO THE EDITOR

Shifting oil dynamics

"Architecture of oil is breaking" (FE, May 8) makes a compelling case that OPEC's erosion is not merely organisational but structural. What replaces it matters enormously, particularly for import-dependent economies like India. Lower prices are welcome, but price volatility without any stabilising mechanism is a serious planning problem. India's energy budgeting, subsidy management, and inflation

targeting all assume some degree of predictability in crude markets. That predictability is now at risk. The government will do well to accelerate strategic petroleum reserve expansion and deepen bilateral supply agreements with diversified producers. Energy security cannot wait for global coordination mechanisms to emerge organically. The transition will be judged, as the article rightly notes, not just by how clean it is but by its stability.—Abharna Barathi, Chennai

Cash in on India's tourism potential

Apropos of "Next tourism leap needs easing visa" (FE, May 8), India's tourism has made a smart post-Covid recovery by expanding e-visa to over 160 countries in order to attract international travellers. As the global competition intensifies, India must have a policy shift with visa liberalisation as a core economic strategy rather than procedural and incremental reform.

Cultural depth, geographical diversity, and institutional capacity are strong requisites to stabilise tourism. Innovative introduction of visa-free travels for listed countries and multi-entry visas for longer duration with assured safety could attract more foreign tourists. Yet, necessary caution must be exercised at the same time, keeping national security in mind.—NR Nagarajan, Sivakasi

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Economy

SATURDAY, MAY 9, 2026

IN THE NEWS

NEXT ROUND OF INDIA-CANADA FTA TALKS IN JULY

INDIA AND CANADA will hold the next round of negotiations for the proposed free trade agreement in July in Ottawa, the Commerce Ministry said on Friday. The two sides concluded the second round of talks for the Comprehensive Economic Partnership Agreement (CEPA) in New Delhi on May 8.

INDIA, OMAN MAY DISCUSS FTA IMPLEMENTATION

IN A MEETING of India and Oman on May 11 in New Delhi, early implementation of the free trade agreement (FTA), signed in December 2025, is likely to figure an official said. The agreement will provide duty-free access to 98% of India's exports, including textiles, agri, and leather goods in Oman.

Ashok Kumar Lahiri takes charge as Niti VC

RENOWNED ECONOMIST ASHOK Kumar Lahiri on Friday took charge as Vice Chairman of NITI Aayog. Lahiri replaced Suman Bery. Lahiri is a former chief economic advisor to the government of India and a member of the 15th Finance Commission.

Chouhan asks NAFED to step up MSP procurement

AGRICULTURE MINISTER SHIVRAJ Singh Chouhan on Friday directed cooperatives NAFED and NCCF to accelerate procurement at minimum support price (MSP) levels, as wholesale mandi prices of pulses and other rabi crops continue to slide below support levels.

Amit Shah to review heatwave preparedness

UNION HOME MINISTER Amit Shah will do a comprehensive review of the country's preparedness for dealing with possible floods and heatwave conditions on Sunday. Shah will chair a high-level meeting to assess the readiness of the central agencies, review early warning systems, resource deployment and inter-agency coordination, to ensure zero loss of life.

'FIRMS BUYING COSTLY OIL, GAS, BUT SELLING AT LOW PRICES'

OMC losses touch ₹30,000 cr a month

SAURAV ANAND New Delhi, May 8

INDIA'S STATE-RUN oil marketing companies (OMCs) are incurring under-recoveries of around ₹30,000 crore every month — or nearly 1,000 crore a day — as petrol, diesel and LPG prices remain frozen despite crude oil surging to around \$120 per barrel amid the West Asia conflict and disruption in the Strait of Hormuz.

PROFIT MARGINS UNDER PRESSURE

■ LPG prices remain frozen despite crude oil surging to around \$120/barrel

■ Govt has cut excise duty by ₹10/litre & diesel

■ Under-recoveries during April stood at around ₹18/litre on petrol & ₹25/litre on diesel

■ Govt earlier ruled out relief packages for OMCs

Oil marketing companies are buying expensive raw oil, gas and LPG from the market. But to protect our consumers, they are selling at low prices," Sujata Sharma, joint secretary, ministry of petroleum and natural gas, said on Friday.

The government has already cut excise duty by ₹10 per litre on petrol and diesel to soften the impact of rising international prices, a move that is costing the exchequer around ₹14,000 crore every month in lost revenue.

The cost of this reduction is ₹1,400 crore per month," Sharma said, adding that had the Centre not intervened, the burden would have entirely fallen on the OMCs.

Industry estimates suggest under-recoveries during April stood at around ₹18 per litre on petrol and ₹25 per litre on diesel, as international crude

Construction gears industry set to grow 7% in FY27: ICEMA

NITIN KUMAR New Delhi, May 8

THE DOMESTIC CONSTRUCTION equipment industry is expected to return to growth in FY27 after a weak FY26, with the industry body Indian Construction Equipment Manufacturers Association (ICEMA) projecting around 7% growth next year.

The recovery is expected to be driven by higher government spending on infrastructure, improving road construction activity, and increased allocation for rural projects, Deepak Shetty, president, ICEMA said on Friday.

As per ICEMA data, the industry had a weak FY26, with total equipment sales declining around 2% year-on-year to 136,995 units, compared to 140,911 units in FY25. Exports, however, rose more than 30%, partly offsetting the fall in domestic demand.

Shetty attributed the decline in FY26 to state elec-



tions, slower execution of roads and highways projects, reduced activity under the Jal Jeevan Mission, and the transition to stricter Stage V emission norms, which increased equipment prices by around 12-15%.

"What happened was that while stricter emission norms helped export growth, they also increased prices in the domestic market," Shetty said. Shetty said growth in FY27 would be supported by the Centre's ₹12.2 lakh crore infrastructure allocation, higher spending on rural roads, railways, mining,

and fuel prices spiked after shipping movement through the Strait of Hormuz was severely disrupted.

The strategic waterway normally handles nearly one-fifth of global oil and gas trade, and the ongoing conflict has sharply raised freight costs, marine insurance premiums and emergency crude sourcing expenses for refiners.

India imports nearly 88% of its crude oil requirement and remains heavily exposed to global energy price volatility. The Indian crude basket, which averaged around \$70 per barrel last year, crossed \$113-120 per barrel in April, according to official estimates.

Despite the global spike, petrol and diesel prices in India have remained unchanged for over four years. Petrol currently costs ₹94.77 per litre in Delhi,

while diesel is priced at ₹87.67 per litre. Domestic LPG is retailing at ₹913 per 14.2-kg cylinder in the national capital.

Rating agency Icri estimates that state-run OMCs are currently making negative marketing margins of around ₹14 per litre on petrol and ₹18 per litre on diesel. LPG under-recoveries are projected at around ₹80,000 crore in FY27 if current trends persist.

Earlier, the government has ruled out any immediate compensation package for losses incurred on petrol, diesel and jet fuel sales, increasing pressure on OMC finances and future capital expenditure plans.

The ministry said fuel supplies across the country remain uninterrupted despite the global crisis.

HURL listing expected in FY27 under govt's monetisation push

SAURAV ANAND New Delhi, May 8

THE CENTRE IS preparing a major public sector monetisation push with state-run NTPC, Indian Oil Corporation and Coal India planning to list fertiliser joint venture Hindustan Urvak & Rasayan Ltd (HURL) in FY27 through a stake sale expected to raise ₹5,000-6,000 crore.

The proposed listing comes at a time when disruption in the Strait of Hormuz has heightened concerns over global fertiliser and energy supplies, with India remaining dependent on imports of urea and other fertilisers from West

PUBLIC OFFERING

■ NTPC, IOC and Coal India are planning to list HURL — their joint venture — in FY27

■ Stake sale expected to raise ₹5,000-6,000 cr

■ Public issue would be among biggest fertiliser-sector listings



Asia. "The plan is the public offering of HURL within the ongoing fiscal as part of the asset monetisation roadmap by offloading 10-11% stake in total to raise ₹5,000-6,000 crore," a senior official aware of

the development said. The public issue would be among the biggest fertiliser-sector listings by a state-backed company in recent years and forms part of the Centre's broader National Monetisation

Pipeline (NMP) programme. HURL was incorporated in 2016 to revive closed fertiliser plants and expand domestic urea manufacturing capacity. NTPC, Indian Oil and Coal India each hold 29.67% stake in the company, taking combined promoter holding to around 89%, while Fertiliser Corporation of India Ltd (FCIL) and Hindustan Fertiliser Corporation Ltd (HFCL) together own the remaining 11%.

The firm operates fertiliser manufacturing units at Gorakhpur in Uttar Pradesh, Barauni in Bihar. Each unit has capacity of 2,200 metric tonne per day (MTPD) of ammonia.

India gets high prices for DAP fertiliser in latest tender

BLOOMBERG May 8

INDIA RECEIVED OFFERS for phosphate fertiliser at more than \$900 a tonne in a tender on Thursday, a fresh sign of how the war in West Asia is boosting costs for major importers.

Prices in the tender, which was organised by Indian Potash, ranged from \$930 to \$1,100 a tonne, according to traders familiar with the matter.

Some 18 companies participated, offering a total of about 2.3 million tonne — almost double the volume sought, said the people, who were not authorised to speak to the media.

While West Asia is a smaller player in phosphate fertilizer compared to the nitrogen variety, almost half of the world's



supply of sulphur — which is turned into the acid needed to process it — comes from countries in the region vulnerable to disruptions in the Strait of Hormuz.

A senior official at Indian Potash was not immediately available for comment.

A gauge of sulphur prices is currently at the highest since at least 2013, Green Markets data show.

Phosphate supplies into India, including freight costs, have climbed more than 30% since the start of war in West Asia, according to price assessment data from Argus Media Group.

"Because India subsidises phosphate, the nutrient is still affordable to Indian farmers but can the Indian government afford these prices?" said Alexis Maxwell, a senior analyst with Bloomberg Intelligence.

The government has absorbed the higher subsidy costs in the past and that indicates they may do so again this year, she said. If the Strait of Hormuz remains closed in May, that would affect buyers in July and August, Maxwell said, adding that India imports the majority of its DAP in the second half of the year.

April e-way bills off March peak but up 12% on year



KULDEEP SINGH New Delhi, May 8

GENERATION OF E-WAY bills under the Goods and Services Tax (GST) regime declined 5.4% sequentially in April to 13.3 million from an all-time high of 140.6 million in March as the year-end rush to move goods eased with the start of the new financial year, according to official data released by the Goods and Services Tax Network (GSTN).

The figure, however, marked a robust 11.8% increase compared to April of the previous year and ranked as the fourth-highest monthly generation on record. This sustained year-on-year momentum signals continued resilience in underlying economic activity and goods movement despite the sequential dip.

An e-way bill is an electronic document generated on the portal that evidences the movement of goods and indicates whether tax has been paid on them.

Under Rule 138 of the CGST Rules, 2017, every registered person must generate an e-way bill for the movement of goods (not necessarily on account of supply) with a consignment value exceeding ₹50,000. The threshold can be lower for intra-state movements.

Manoj Mishra, Partner and Tax Controversy Management Leader at Grant Thornton Bharat, said the moderation compared to March figures appears largely seasonal in nature.

Bengal likely to rejoin crop insurance scheme after new govt takes charge

SANDIP DAS New Delhi, May 8

WEST BENGAL IS likely to join the highly subsidised crop insurance scheme, which is run jointly by the Union and state governments, immediately after a new state government assumes office.

According to sources, discussions are underway to onboard the state, which had earlier opted out of the Pradhan Mantri Fasal Bima Yojana (PMFBY), starting next kharif season.

The Mamata Banerjee government had refused to join the scheme, citing factors including financial constraints. Currently, PMFBY is being implemented across 24 states and union territories.

West Bengal is the biggest rice-producing state while it has a major share in the country's fruit, vegetable, and tea production.

The crop insurance scheme provides comprehensive risk coverage from pre-sowing to post-harvest stages of crops.

WELCOME MOVE

■ Mamata Banerjee govt had refused to join scheme, citing factors including financial constraints

■ Currently, PMFBY implemented across 24 states & union territories



■ It has major share in the country's fruit, vegetable, and tea production

Farmers pay a fixed premium just 1.5% of the sum insured for rabi crops, 2% for kharif crops, and 5% for cash crops.

The premium subsidy is divided equally between the Centre and the state with the exception of north-eastern states where the premium is split in a 9:1 ratio between the Centre and states.

According to ministry data, over ₹1.98 lakh crore has been paid to farmers under PMFBY as compensation since its

launch in 2016, which was five times the total premiums of ₹40,097 crore paid by them so far.

Since its launch in kharif, 2016, 27 states and union territories have implemented the scheme in several seasons. However, Bihar, Telangana, Andhra Pradesh, Jharkhand, West Bengal and Gujarat opted out of the scheme due to factors including financial constraints.

However, Andhra Pradesh and Jharkhand have re-joined

GLP-1 market surges as semaglutide demand rises despite price cuts

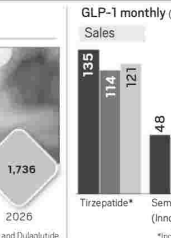
MANU KAUSHIK New Delhi, May 8

A SHARP REDUCTION in the prices of its weight-loss drug helped Danish drugmaker Novo Nordisk record a 70% jump in sales volume of flagship brand Wegovy in April, according to healthcare research firm Pharmark. Last month, Wegovy sold 17,000 units, up from 10,000 units a month ago. The combined sales of four innovator semaglutide injectable brands — Wegovy, Ozempic, Povidra, and Extensior — delivered nearly 40% volume growth in April (over March), the data showed. Following the entry of cheaper generic versions of semaglutide in the domestic market, Novo nudged the

price of the starting dose of Ozempic by 36%, while that of the starting dose of Wegovy by 48%.

Despite the rise in sales volume, the turnover for semaglutide brands slipped from ₹46 crore in March to ₹44 crore in April. Novo Nordisk directly sells Wegovy, Ozempic and Rybelsus in India, while it has partnered with Emcure Pharmaceuticals and Abbott India for brands such as Povidra and Extensior, respectively. Ozempic is a GLP-1 drug used to treat type-2 diabetes, while Wegovy is prescribed for weight loss in people living with overweight or obesity. Both contain semaglutide and work by regulating appetite and blood sugar levels.

MARKET SIZE



Driven by cheaper generic semaglutide launches, India's GLP-1 market more than tripled to ₹1,736 crore in April 2026 from ₹545 crore a

year earlier. In the generics segment, Torrent Pharmaceuticals has emerged as the market leader, controlling nearly 38% share of the overall

semaglutide generics market and 28% share in injectable semaglutide generics. Torrent is currently the only company offering oral

generic semaglutide in India through Semalix and Semobol. Pharmark data showed generic semaglutide sales

surged 238% in April over March, with companies such as Zydus Lifesciences and Lupin gaining share. Shortly after the launch of generic semaglutide drugs, the market share of rival drug tirzepatide took a hit with monthly sales of originator Eli Lilly's tirzepatide brand Mounjaro dropped 21% in March.

Eli Lilly drugs show modest growth

However, the April data showed that Eli Lilly's weight-loss drugs Mounjaro and Yurpeak (Lilly-Cipla collaboration brand) have recorded a modest 6% growth in value terms in April as compared to the March sales.

"Broadly, the innovators in both the semaglutide and tirzepatide segments have managed to retain their position well despite the generic onslaught.

"Steady growth of innovators also indicates stickiness of a class of doctors and patients to originators," said Sheetal Sapale, vice president (commercial) at Pharmark. The Pharmark report said that while semaglutide and tirzepatide injections (launched in 2025) propelled the growth of the GLP-1 segment, generics have expanded the market itself.

The key aspects driving the market growth include concept acceptance, wider nose levels, user friendliness of injectables form.

Bringing Kapitalism Back to Kolkata

Beyond gov capex to change investment climate

Few cities have had their epitaphs written as emphatically as Kolkata. Yet, the city still ranks after Mumbai and Delhi in economic output. Having cycled through a range of borrowed socialisms, West Bengal is finally ushering in a capitalist ideology that had made it India's preeminent economic hub a century ago. The process, Chief Minister Adhikari, will have to be as deliberate and systematic as the preceding decades of collapse.

Reversing capital flow to Kolkata means going beyond government capex to permanently change the city's investment climate. Earlier efforts by the Left led to political setbacks that derailed the process. The incoming BJP government has the advantage of a large mandate as well as a clear vision for structural changes. Kolkata turned into a rust bucket not because its heavy industries died, but because they moved elsewhere. Getting them back may not make sense any more. But sunrise industries can be seeded to develop advanced manufacturing capabilities.

Strain on India's rapidly growing urban clusters makes Kolkata an obvious choice for accelerated development. It is also critical to balancing regional disparity Bengal needs specific timelines on pulling up contribution of industry and logistics to national averages. A roadmap must be presented on turning it from a consuming region to a producing region. Stopping the drain of capital will have a spillover effect on growth of the remittance economy. Unnecessary migration is causing stress on resources in more productive states. A less combative federal structure can accomplish the balance in economic growth. Given Bengal's resource endowments, an economic turnaround key to India's strategic interests. As the rallying cry goes: *Jai Ma Kali, Kalkattewali!*

Woke, Conservative, Both Orthodoxies

We don't just live in polarised times, but at a time when being polarised is considered part of one's identity. Conservatism, we are told, is the instinct to preserve tradition. Yet, the woke have perfected a parallel instinct: to preserve orthodoxy, only under different parameters. The right-wing clutches its rosary beads of family, faith and flag. The woke clutch theirs of pronouns, diversity and perpetual 'anti-ism'. Both demand conformity. Both punish deviation. Both find mantras and slogans reassuring. Both, in effect, are conservative.

Take censorship. The right-wing demands bans on movies, food items, books, even 'looks' that offend its sensibilities, whether on religion, sexuality (under the garb of 'values' or 'sheer aesthetics'). The woke, with equal fervour, ban content that stumbles on the latest linguistic or 'acceptability' tripping. The mechanism is identical: ostracism and outrage dressed in ideological couture. 'Cancel culture' is the conservative excommunication ritual that tries to look cool. Consider 'safe spaces'. The left-liberal insists on them as shelters from offensive ideas. The right insists these to be sanctuaries for offensive people. Both are fortresses against contamination, both defining 'decency' in their own non-negotiable way. And when the woke declare certain words verboten, they echo the right's moral policing. One side's insistence on sticking to an 'amoral' code is another side's fervour for morality. Both demand obedience to dogma. The irony is that the woke, in their zeal to be radical, are really conservative cousins — the new orthodoxy exchanging withering looks with the old.

So, the terms 'right-wing' and 'left-liberal' are increasingly facetious. They prop up the illusion of polarity while concealing the sameness of their conservatism. One guards the temple of tradition, the other guards the clubhouse of progressivism. But both demand obedience to dogma. The irony is that the woke, in their zeal to be radical, are really conservative cousins — the new orthodoxy exchanging withering looks with the old.

JUST IN JEST

What the Devil wears is passé — fallen angel couture is hot as Hell

It's the 'Cast Out of Prada-Dise' Look

The Devil may still wear Prada but, frankly, that's yesterday's inferno. The real burn is around the fallen angels, who have staged a celestial couture coup. Forget sleek black suits and sensible stilettoes. These rebels have embraced radical fashion that makes Anne Hathaway and Meryl Streep look like missionaries of ho-hum clarity. The strut about town now is wearing winged jacked-in, rickshaw graffiti, halos repurposed as headgear, and robes stitched from shredded non-disclosure agreements. Too who? Clearly, you're still stuck in a sequel. Flaunting a sarri worn from hashtags that once trended but died in shame is where it's at. To be accessorised with flaming wigs reimagined as avant-garde handbags, and trumpets bent into ironic choirs.

It's time to forget the old orthodoxy of sleek power dressing. The fallen angels, instead, embrace controlled chaos couture. Their look says, 'We've been cast out, but aren't we fabulous?' Vogue may be vague and hesitant, but the real glossies of social media and meta-galas are already ablaze with tutorials on how to contour your cheekbones with ash from burnt bridges. In the end, Hell's hottest runway proves that true rebellion isn't about Prada and its ilk, but about being cast out of Prada-dise and turning damnation into a fashion statement. Irony, be certain, never goes out of style.

As US reboots psychedelics from counterculture to R&D, Indian pharma must take the lead

Doors of Perception



Arnie Guha

Toronto: Last month, Donald Trump signed yet another executive order. This one was to accelerate research and regulatory review for psychedelic drugs aimed at serious mental illness, particularly in relation to treatment-resistant conditions. Response to the ED has been widely seen as progressive. It appears that the US, once the chief architect of 'war on drugs', is now preparing to rehabilitate the very substances it spent half a century criminalising.

In India, this elicits a sense of déjà vu. Long before psilocybin entered clinical trials at Johns Hopkins University, or ketamine clinics appeared in Manhattan, Rig Veda had already offered one of civilisation's oldest surviving articulations of sacred, altered consciousness: 'We have drunk soma and become immortal, we have attained the light, the gods discovered' (Rigveda 8.48.3).

There has been much academic debate about what 'soma' actually was. Scholars have proposed ophebra, Amanita muscaria, Syrian rue, cannabis preparations, or perhaps some novel ritual compound. But irrespective of whether soma was pharmacologically psychedelic in the modern sense, its function as sacramental alteration of consciousness was unambiguous. Soma was not entertainment but ritual — not to be treated as escape from reality but as access to a deeper one.

Modern psychedelic discourse often begins with chemistry. Ancient India thought began with an exploration of ontology. The modern West tends to ask what a substance does to the brain. Indian philosophical traditions, from Purnishas to Vedanta, Buddhism and Tantra, were not so partial to the question of partial perception. Ontological traditions are not interested merely in altered states, but in whether the self was able to grant access to the provisional. And though



Use our knowledge, get a head

modern interest in psychedelics is largely rooted in pharmacology, much of the vocabulary surrounding the psychedelic experience — from ego dissolution and non-duality to the instability of selfhood and perceptual unveiling — resonates deeply with precisely this civilisational inheritance. The word 'psychedelic' — mind-manifesting — was coined in 1956 by Humphry Osmond, a British psychiatrist working in Canada. So, how did a civilisation that once ritualised altered consciousness become so bureaucratically anxious about it? The answer lies, as it so often does, in paperwork.

The British, contrary to modern assumptions, did not begin with blanket prohibition. Indian Hemp Drugs Commission of 1893-94 was one of the largest drug inquiries ever conducted. But it leaned strongly against total prohibition, finding moderate cannabis use far less socially destructive than moral panic suggested. Regulation, taxation and control were preferred to criminal hysteria.

Even after Independence, cannabis retained cultural legitimacy. Bhang remained ordinary Ganja and charas existed within social and ritual boundaries, and had not yet collapsed

Under controlled conditions, entheogenic substances may help loosen rigid psychic structures, restore neuroplasticity and relieve self-suffering produced by an over-fortified sense of self

into the same moral category as hard narcotics. The real rupture came through international diplomacy. The Single Convention on Narcotic Drugs in 1953, shaped heavily by post-war prohibitionist logic and US drug policy influence, pushed toward a global flattening of distinction. A ritual intoxicant became a narcotic threat. India actively resisted. Goli insisted that cannabis leaves should be exempted from any provisions whatsoever; arginine were less harmful than alcohol and used widely by Indians. A subsequent compromise allowed a long transition period.

By 1985, under Narcotic Drugs and Psychotropic Substances Act, India moved decisively into the prohibitionist legal framework. Older distinctions did not disappear entirely. For instance, bhang still occupies an established legal and cultural position. But, somehow, the broader prohibitionist conditions, entheogenic and narcotics entered the same bureaucratic vocabulary.

Now, the US, having helped lead prohibition, is preparing to lead medical rehabilitation, and the medicine is moving from counterculture to therapeutic infrastructure: clinical trials, psychiatric protocols, trauma treatment, veteran care, and life medicines. If battles and the slow construction of a more wellness ecosystem.

This rehabilitation is underwritten by the exciting premise that under controlled conditions, entheogenic substances may help loosen rigid psy-

chic structures, restore neuroplasticity and interrupt the suffering produced by an over-fortified sense of self. At this pivotal moment in the West's relationship with psychedelics, India needs to ask whether it wishes to be a mere consumer of, or a global leader shaping, that future. This is not an argument for drug tourism or spiritual kitsch. If India is to avoid importing the very cognitive frameworks it once helped articulate, then it must reclaim agency in this field. Three strategic initiatives can establish its position:

1 National Institute for Study of Consciousness Establish a serious multidisciplinary centre dedicated to rigorous inquiry into altered states, drawing on classical Indian ontological frameworks, from Vedanta to Buddhist phenomenology, while integrating them with contemporary neuroscience, cognitive psychology, psychiatry and AI-driven models of cognition.

2 Active sovereign role in therapeutic development India's granamic medical and psychiatric institutions must be mobilised to lead clinical trials and develop indigenous psychedelic-assisted therapies.

3 Progressively culturally fluent legal framework India must move beyond borrowed prohibitionist panic embedded in the 1985 NDPS regime. It

needs regulation that preserves medical safety and ethical rigor while recognising that entheogens are not merely scheduled narcotics but potentially legitimate tools for psychiatric rehabilitation and consciousness exploration. India produced one of the earliest, and most sophisticated, philosophical frameworks for thinking about consciousness itself. It's also home to a globalised, progressive, pharma manufacturing infrastructure that exports drugs across the world. If the next frontier is not merely curing the body but rethinking experiential dimensions of the mind, then India should not arrive late to its own inheritance.

The writer is chair, advisory board, of the Center for Consciousness Studies, British Columbia, Canada

THE SPEAKING TREE

Kinship With Nature

RAM KRISHNA SINHA

In an age when our interaction with nature has been largely transactional, this is an invitation to study Rabindranath Tagore's communion with nature.

'Tagore, through his soulful and sensitive poetry would share his intimate feelings with inhabitants in nature, animate or inanimate, be it rain, winds, clouds, flowers, birds, plants, forests, rivers, stars in the sky, the full moon and with its varied forms and rhythms. Tagore believed that nature reveals to us the inner unity of the world. It enables us to dissolve our narrow self-focus opening the path to developing as a universal man. He spoke of a deep spiritual presence in nature's balance and harmony amid diverse moods of seasons.

He shifted the focus, in Santiniketan, from teaching 'content' to creating 'conditions' that help in the child's connection with nature. This religion of spiritual harmony is not a theological doctrine to be taught, 'he said, 'it can only be possible by making provision for students to live in infinite touch with nature, daily to grow in an atmosphere of service offered to all creatures, including trees, feeding birds and animals, learning to feel the immense mystery of the soil and water and air... In such an atmosphere, students would learn to understand that humanity is a divine harp of many strings, waiting for its one grand music.'

To celebrate nature with all its immense variety, the East and West, he would be smudged with factory smoke and the green of the living nature will be licked grey by the demon of the utilitarian spirit.'

Don't Put InvTs, REITs on the MAT



Amitabh Kant

Infrastructure creation is central to India's economic policy. This, even as global capital flows have become more selective, and medium-term capital at scale, both domestic and global, through efficient financial structures.

India's listed business trusts have emerged as a credible bridge between long-duration savings and income-generating assets. They have also provided an effective route for monetisation of operational assets. India has 5 listed REITs and more than 24 listed InvTs with an aggregate market capitalisation of around ₹1 lakh cr. This growth has been built on clear design principles.

► Distribution discipline Regulations require 90% of free cash flows from SPVs to the trust, and from trust to unit holders. This creates visibility of income and allows investors to treat these instruments as yield products.

► Single-layer tax framework Dividends from SPVs outside the new corporate tax regime are exempt at both trust and unit holder levels, while interest, rental income and capital gains are taxed in a defined manner. This ensures that the same cash flow is not taxed multiple times as it moves through the structure.

Earlier inefficiencies, including dividend distribution tax at the SPV level, were removed to improve returns and enable scale. Predictable taxation supports predictable cash flows, and predictable cash flows attract long-term capital.

Budget 2026 restructured treatment of minimum alternate tax (MAT) credits. It links utilisation of accumulated MAT credit to a transition to the new corporate tax regime, caps annual utilisation, and discontinues further accumulation of MAT credit beyond April. For most companies, this is a transition device. For SPVs within REIT and InvT structures, it creates a structural constraint.

If SPVs move to the new corporate tax regime to utilise accumulated MAT credit, dividends distributed by these SPVs become taxable in the hands of unit holders under the framework. This reduces yields and weakens positioning of these instruments as stable income products. If SPVs remain

outside the new regime to preserve dividend exemption, accumulated MAT credits may lapse, and future MAT liabilities may arise due to timing differences inherent in capital-intensive sectors.

The combined effect introduces uncertainty in distributable cash flows. This must be avoided. REITs and InvTs are now integral to India's infrastructure strategy. Business trusts account for close to 40% of assets under management and are expected to expand over the next few years. They attract long-horizon capital from pension funds, insurance companies, MFs and sovereign investors. They also enable monetisation by central and state public sector entities.

The objective to expand REIT formation by FSUs depends on maintaining stability of the underlying framework. The goal is to ensure that predictability will increase the cost of capital.



Pin down infra

and weaken investor participation. The issue is not the direction of reform but the design. India needs a financing architecture that supports scale, predictability and long-term participation.

Policy certainty is central to this. It lowers the cost of capital and enables deeper markets. Two design choices can address the issue. **► Allow business trust SPVs to remain outside the new corporate tax regime, while retaining the ability to carry forward and utilise accumulated MAT credits.** This preserves existing entitlements and avoids disruption to yields.

► If transition to the new regime is required, retain the single-layer tax structure by ensuring that dividend income remains exempt in the hands of unit holders. This aligns with the broader tax framework while ensuring competitiveness of these instruments.

India has taken a decade to build REITs and InvTs. The next phase will require expanding the asset pipeline, increasing domestic participation and using these structures to replete capital at scale. India has the assets, investor interest and policy intent. Execution will depend on maintaining a stable and predictable framework.

The writer is former CEO, NITI, August

Not Just Sex on Ultrasound's Mind



C K Mishra

In 1994, India faced a crisis. Cheap ultrasound technology had made sex determination easy, female foeticide was rampant and sex ratios were worsening. Pre-Conception and Post-Natal Diagnostic Techniques (PC-PNDT) Act was a serious response to a serious problem. Thirty years on, however, India's sex ratio at birth has barely improved, from 109.2 in the early 1990s to 108.1 by 2020. The law's impact on sex ratios has been modest, even as concerns have emerged about its effects on broader healthcare access.

Ultrasonography (USG) is cheap, radiation-free and portable. Its applications extend far beyond obstetrics. Emergency physicians use it to detect internal bleeding. Cardiologists rely on it to assess heart function. Orthopaedic and trauma care depend on bedside USG for rapid diagnosis of injuries. Studies show it can reduce hospital stays by up to 4 days. In much of the developed world, USG machines are operated by technicians and nurses. India, with roughly one machine per

15,000 people, has limited access to this technology not just in rural areas but across diagnostics. Regulatory complexity under the Act is one factor slowing the spread of USG facilities.

Internationally, the fight against sex selection has been addressed through education and economic empowerment. South Korea expanded female labour-force participation and reduced families' dependence on sons for old-age support. Its sex ratio fell from 116 in the 1990s to 104.7 by 2022, within the natural range, and its ban on sex determination was lifted in 2024. In India, meaningful improvements came only after 2011, driven by attitude-change campaigns such as 'Beti Bachao, Beti Padhao', rather than PC-PNDT enforcement alone.

The problem is not the law itself. The problem lies in implementation. What counts as a compliance failure in one jurisdiction may pass unnoticed in another. This patchwork of enforcement creates perverse incentives. Ethical practitioners, concerned about legal standards and fearful of disproportionate consequences, are deterred from setting up USG facilities altogether. Meanwhile, those willing to flout the law often find ways around it, regardless. A 2020 analysis found that 68% involved procedural, rather than substantive, violations. Cases involving sexed machines and criminal prosecution for minor clerical errors reflect failures of implementation rather than legislative intent. Clearer and more uniformly applied procedures would also reduce the scope for discretionary enforcement and problems that can accompany it.

No other country has made access to USG as difficult. The human cost is visible. India's maternal mortality rate stands at 80 per 100,000 live births, nearly 20% South Korea's figure of 4. Fewer than 90% of Indian women also receive adequate antenatal care. Beyond maternal health, compliance costs have pushed doctors toward costlier and less-appropriate alternatives, with patients paying for X-rays and CT scans when an affordable USG would have sufficed.

In rural India, where MRI and CT are neither financially nor operationally viable, USG is the only realistic path to expanding diagnostic access at scale. The Act has foreclosed that path. It has

the right foundations. Building on them requires attention to two priorities: **1. Simplify the regulatory process** of registering and operating USG facilities, particularly portable and handheld devices, in its current form is a deterrent to legitimate medical practice. Obtaining a licence can take over a year. Documentation requirements are extensive, and the consequences of minor clerical errors are disproportionate.

2. Streamline approvals and distinguish procedural lapses from substantive violations would make compliance far more achievable for practitioners seeking to go good. **3. Uniformity** The Act is applied differently across states. This inconsistency lies at the heart of the problem. When enforcement standards are unclear and variable, practitioners cannot know with confidence what compliance requires.

The solution is a set of national guidelines that are uniform and consistently what constitutes a serious offence and what constitutes a minor lapse, applied uniformly across the country. PC-PNDT Act was born of genuine concern and remains valid. But its administration deserves careful reform. The task at hand is not to dismantle the law's purpose but to improve how it is implemented.

The writer is former health secretary, Goa

Chat Room

As Strong as the Weakest Link

'A House for Mr Viswas' by Anil Pandey (March 9) identifies something that anyone who has dealt with Indian financial institutions will recognise immediately — the system's weakest position is its discipline, not trust. The KYC burden is a symptom of that deeper problem. Aadhaar and eKYC have reduced friction for a sumat, but, as the writer notes, digital verification cannot fix a low-trust economy. What's needed is a regulatory philosophy that actively differentiates between compliant and non-compliant actors, rewarding responsible behaviour with tangible benefits rather than treating everyone as an equal risk. *M Barathi, Bengaluru*

The agony and agency of eunuchs



PAST PARTICIPLE
MANU S PILLAI

In 1580, the sultan of Bijapur was stabbed to death in his own bedroom. Ali Adil Shah was an interesting type of chap. He ate not less than 12 eggs per day for his health; he liked to read, travelling even to battlefields with books; had interests in philosophy and the occult; and also styled himself a Sufi. Evidently, his sex life was quite adventurous too. The Mughals—foes to Bijapur—complained, for instance, of how the sultan was “staining the skirt of his chastity”, rolling about in the “dustbin of carnality”. It could just be enemy propaganda, but the story goes that one day Ali asked an uncommonly handsome eunuch to “lie with him”. The latter went close, only to spring a surprise. Pulling out a knife, he “plunged [it]... into [Ali’s] hypochondria with such force as to put a stop to all sensual desire”. The famous warrior-prince of Bijapur met his end, thus, at the hands of a *hassisi* (castrated man).

For much of the last 1,000 years, eunuchs have been an important component of India’s political system under assorted rulers. Though certain Sanskrit terms have been translated as “eunuch” in lieu of a third gender, “there is no evidence”, writes Wendy Doniger, “that there were eunuchs in India before the Arab invasions”. Muslim court culture, however, created an important space in the form of the eunuchate, an institution inherited

from pre-Islamic powers in West Asia and Persia. So much so, that in a few centuries, it was perfectly normal to encounter this class of servants even in Hindu states. In 1646, for instance, Tirumala Nayaka of Madurai, was seen attended to by eunuch guards. In 1829, the dependents of a deceased Rannad zamindar in Tamil Nadu included, besides slaves, maids, concubines and guards, a Brahmin eunuch. A century before too, a eunuch was among Ramnad’s officials courted by the Dutch.

The origins of the eunuchs were diverse. In 1785 we have Tipu Sultan asking his envoys to the Ottoman empire to purchase and bring back 12 children of “Abyssinian race”. Persians and central Asians were also popular, while within India, boys were supplied from all over—Kerala, Odisha, Maharashtra and particularly Bengal. Sometimes children were sold by their families; in other cases, they were abducted and castrated. Emperor Jahangir even noted how in Sylhet sons were given as tax payments; “every year”, he noted, “many children are ruined” this way. The emperor, like others after him, tried to outlaw the trade. But given how even the imperial house was highly dependent on eunuchs, little came of it. Jahangir himself accepted eunuchs among the gifts he received from subordinates. Once it was 68 elephants, four horses, and 50 eunuchs. On another occasion it was 70 “fine boats” and “several eunuchs”.

Royal dependence on these men had many reasons, despite religious strictures against castration. For one, eunuchs were ideal guards for harems and their female residents—they were male and for this reason, sturdy watchmen. Yet there was no risk of any illicit interaction with royal women. At least, this was the theory; Thomas Roe, the



Emperor Jahangir was once gifted 50 eunuchs.

17th century English envoy to the Mughals, for example, recorded a harem lady discovered “in some action with an eunuch”. The woman was buried to the armpits and left to wilt in the heat. Her associate meanwhile was trampled to death by an elephant. Another logic was fidelity: as with slaves, it was assumed that eunuchs, devoid of family loyalties, would make for devoted servants. In the 14th century, Alauddin Khilji’s most-trusted military hand, thus, was Malik Kafur. It was this Hindu-origin eunuch warrior who conquered most of the Deccan for his master in Delhi.

Despite the stigma attached to them (along with potshots about the smell of leaking urine that apparently trailed their persons), eunuchs could rise to positions of great power. In 18th century Awadh, its influential begums engaged with the world through two senior eunuchs. These men moved around on elephants, flaunted their wealth through acts of charity, and were flattered as icons of masculinity. Another Awadh eunuch Almas Khan in the 1780s controlled a quarter of the total revenues of the state as tax farmer. He established a new town—Miyanganj—and was described by a British commentator as “the greatest and best man of any note” in the region. Later when Awadh’s nawab wished to appoint him minister, the British opposed the idea. They preferred someone weaker and more amenable to their control; the stately old eunuch with his “unaccommodating disposition” was not that person.

Interestingly, overpowered eunuchs could sometimes become an affront to rulers. In the late 1430s, the Bahmani sultan of the Deccan handed over his ministership to a eunuch. The latter’s “insolent behaviour”—however, annoyed the crown prince who—as princes tend

to do—orchestrated his murder. Some decades later, as Bahmani power crumbled, a eunuch lord, Dastur Dinar, felt confident enough to aspire to sovereignty. While he failed, his hopes were not misplaced. After, only a century before, in Jaunpur in upper India, a eunuch had successfully founded a dynasty (his heir was an adopted son, in case you’re wondering). In Bengal too in the 15th century, a eunuch killed a sultan and briefly seized power. But for most part, eunuchs wielded power from behind the scenes. At least two sultans of Ahmednagar, thus, were under the influence of Fahim Khan—a eunuch also known for fighting the Portuguese.

At the end of the day, though, life for these men was still one of general contempt. Castration as an act was horrifically traumatising; the Mughals, in fact, deployed it as a punishment. Most eunuchs were mutilated without consent. Estimates vary, with some saying one in three boys survived the procedure, others that the figure was one in ten. Even those who made it out alive faced lifelong difficulties: trouble urinating, hormonal and physical abnormalities, and so on. That some of them rose to high status does not mitigate the cruelty of their formative years. And for the few hundreds who made it to the historical record—with names, titles, and political offices—there are thousands who lived and died on the margins. One can sympathise, then, with that unnamed eunuch whose forbearance broke as he stabbed Ali Adil Shah in 1580. That pressed unwillingly into a sultan’s bed, he chose to leave him in a pool of blood instead.

Manu S. Pillai is a historian and author, most recently, of *Gods, Guns and Missionaries*.

Revelry, grief and care in Koovagam

A new photobook documenting the ancient festival in Tamil Nadu exposes the gap between law and social reality

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In 2018, photographer and documentary filmmaker Shino Chierian decided, on an impulse, to attend the Koovagam festival in Tamil Nadu, which spans 18 days of the month of Chithirai (April-May) in the Tamil calendar.

At 28, he hadn’t done anything close to as daring as venturing into a completely unknown terrain, inhabited by people who were nothing like him. However, along with his friend and fellow photographer Ram Manu Prasad, Chierian went on to document the events of the crucial two days that mark the end of the festival. The result, after eight years and multiple failed attempts at bringing the work to a wider audience, is the recent book, *Souls of Someone: Myth, Magic and Mourning in Koovagam*.

For two-and-a-half weeks each year, transgender women from all over south India, as well as other parts of the country, travel to the village of Koovagam to celebrate an ancient festival that takes place at the Koothandavar temple. The community worships at the altar of the deity, who is known by many names, but most widely as Aravan, son of Arjuna in the Mahabharata.

Legend has it that to win the Kurukshetra War, the Pandavas were required to sacrifice one of their finest men. Since Krishna and Arjuna were indispensable to the battle, it fell to young Aravan, Arjun’s son with a Naga princess, to offer himself up for the cause. He agreed, but on the condition that Krishna would grant him three boons, one of which was not to die a virgin. So no woman was willing to marry Aravan for one night and become a widow the morning after, Krishna assumed his female form, Mohini, and became Aravan’s wife, then subsequently widow.

Following this lore, to this day, trans women enact the sequence of events that describe Aravan’s tragically short life. After over two weeks of song, dance, rituals and worship, the women get “married” to Lord Aravan on the penultimate



The ‘aravani’ mourning as widows of Lord Aravan, and (right) celebrating at Koovagam festival. PHOTOGRAPHS COURTESY HARPERCOLLINS INDIA

day of the Koovagam festival, which leads into a night-long revelry involving sex with local men from the village before dawn breaks, leaving the *aravani*—the brides of Aravan—widowed after a few hours of marital bliss.

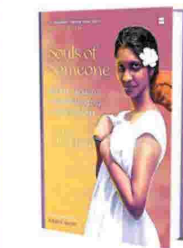
The newly bereft women then wail and keen over the loss of their husband, break their bangles, tear the *thalai* that were tied around their necks just the evening before, and shed their colourful saris for the white attire of a widow. The “Amsterdam of Tamil Nadu” then returns to being a sleepy hamlet for another year, until it wakes up again in April-May.

Chierian, along with his friends Prasad and Praveen Kumar Raja (whose photos also feature in the book), is among the many chroniclers of this unique phenomenon. Over the years, Koovagam has been turned into a media spectacle,

attended by throngs of reporters and tourists who gawk at the events, turning the camera into a tool for “othering”.

As Chierian writes in the book, scores of “cameras are at the ready... about to package the women’s grief for mass consumption” on the final day of the festival. The early morning rain, which pelts down unflinchingly each year, adds to the intensity of the loss. “It is like the gods pour their hearts out in grief,” he says on the phone.

What makes Chierian’s work stand out, though, is the humility with which he approaches his subject. “I come from an engineering background, so I took time to understand where I stand in the world of photography,” he says. Currently based in Kochi, the 34-year-old started out as a “street photographer”, very much in the mould of Steve McCurry, whose docu-



Souls of Someone:
By Shino Chierian,
HarperCollins India,
192 pages, ₹799.

mentary style is invested in capturing the ongoing moment.

As he moved on to making portraits, Chierian had to recalibrate his eye from the serendipity of “activity-oriented photography” and train it to look inward. “I felt I was documenting something beyond what we can see,” he says, describing his state of mind while at the Koovagam festival for the first time. His encounter with an unknown way of life, with its own set of rules and conventions, forced him to rethink his own subjectivity. As transgender activist Grace Banu writes in her introduction to the book, Chierian enters Koovagam holding his camera “as a shield against the unknown.” By the end of his time there, the camera is “no longer a shield, but [had] become a witness.”

Unlike the typical urban photographer, entitled in their habit of parachuting themselves into “exotic” situations, Chierian grapples with doubts and dilemmas even as he makes his way to the festival grounds. He confronts his uneasiness candidly. He writes about an encounter with a trans woman on a train in 2016 that left him unsettled and fearful of the community. Even as he lands up in Koovagam, he cannot get over the feeling that he is an interloper, who is violating a space that

belongs to others.

“Do I deserve to document these lives?” he asks himself in his visual diary, feeling like he is trespassing on private moments. He approaches the trans women as a younger brother (*thambbi*) would do an elder sister (*alika*), shares his own story with them and asks about their lives, instead of simply acting trigger-happy with his camera.

Ironically, the photographer may think of himself as being a free agent—an architect in control of his subject—but, as Banu points out, the dynamics of power get subtly inverted without their knowledge at Koovagam. “My community of sisters, mothers and daughters demanded that he see them,” she writes, handing back control to the trans women, who allow the “other” to enter their exclusive space every year and partake of a life-changing experience. Chierian, too, confirms this fact. As one trans woman put it to him when he went back this year, “This festival is like a family reunion for me, I belong here. It is you who are the outsider here.”

Reading *Souls of Someone*, especially in the context of the recently passed Transgender Persons (Protection of Rights) Amendment Bill, 2026, feels like a ringing evidence of the inadequacies that plague the imagination of our legislators. Entering Koovagam through the book is like stepping inside a realm where the medico-legal tyrannies of the state fall apart, leaving the onlooker vulnerable to the bizarre reality of a primeval collective experience.

“The current law is inhuman,” Chierian says, “it expects these women to present themselves to medical boards and be vetted for who they are.” When he returned to Koovagam earlier this month, one *aravani* warned him, he says, “If the state can question our identity today, what’s stopping it from asking you tomorrow to prove that you are male?” she said.

In the end, it is the common humanity of the community and this extraordinary moment as they come together to enact that turn out to be the great leveler. “We do not grieve to end grief,” as Banu writes, “Rather, we grieve because it shows our capacity to care.”

Unlike the typical urban photographer, Chierian grapples with doubts as he makes his way to the festival grounds and confronts his uneasiness candidly.

THE PAIN I

Online pharmacies, quick-fix products and explainer videos have transformed the wa

Shephali Bhatt & Mahalakshmi Prabhakaran

Initially, Navin Israni, 36, didn't treat his back pain as much as he furnished around it. A back-support cushion for his work chair, then a medicine ball he tried sitting on and returned for being too large—both ordered online. The cushion on his sofa moved up to act as back support, then a sheet of plywood affixed to provide a firm seat. At doctors' clinics, he avoided soft couches in waiting rooms whenever he could. The content marketer first felt this sharp ache across his back in late September 2024. It quickly began to shape his days. He works from home, but reached a point where he could no longer sit comfortably at his desk, walk along the inclined road outside his Pune residence or play tennis, a sport he had loved since childhood. Pain had affected every aspect of his life.

"I hoped for a day free of pain," he says. During this period, Israni's close friend with a much worse back-and-neck condition underwent surgery. Looking back, he suspects watching that friend's recovery pushed him "to do something about my pain instead of living with it". An MRI revealed loss of lumbar lordosis (the lower back's natural inward curve), along with multiple low-grade disc damages. For the first four months, the medical system frustrated him further. His first orthopaedic doctor was dismissive of his questions, his first physiotherapist handed him standard exercises that only made the pain worse, he says. A second physiotherapist, found via Google Reviews a year later, gave him more basic exercises he could graduate from slowly. Eventually, these exercises, along with supplements—zinc, calcium, vitamin D—started to reduce the flare-ups.

Israni also came across videos by American physician Brad Farnestil and chronic pain coach Maggie Sterling. Both helped him understand psychoplastic, or neuropsychoplastic, pain: the kind that persists even after tissue has healed because the brain's pain signalling remains heightened. "The damage was real," he says. "But knowing the stress was making it worse, and that basic physio without surgery could lower it or even take it away, calmed me down."

This is increasingly sounding like the new urban Indian phenomenon. Doctors unpacking pain in viral videos, a productivity and fitness culture that leaves little room for niggling discomfort to fester, and relief often just a click away rather than a trip to the chemist or a physiotherapist. Together, these forces have transformed how urban India seeks pain relief, all the while reshaping our understanding of pain and our relationship with it.

In a culture long shaped by the twin scripts of "mard ko dard nahin hota" (men don't feel pain) and the woman as the site of endurance—where period pain, labour and other unnamed aches are absorbed without whisper—this shift feels significant.

India's analgesics market was worth approximately ₹16,757 crore as of March, according to data shared by Pharmarak, a B2B pharma commerce and insights company. It has grown at a steady 9% CAGR over the last five years, and is expected to maintain a growth rate of 5-6% over the next two-three years. And this is only through the offline pharmacy channel. It does not account for online sales, physiotherapy, chiropractic and acupuncture treatments, pain-relief patches, muscle-relaxing sprays, roll-ons, ointments, devices, infrared belts, hot and cold packs, ergonomic supports bought online, or the huge amount of money people spend on healing yoga retreats, pilates and Ayurveda subscriptions.

The same Pharmarak data also shows a steady decline in offline sales of over-the-counter (OTC) analgesics such as Dolo, Calpol, Combiflam across a five-year stretch. Dolo, the household painkiller of the covid years, has shrunk from ₹549 crore in March 2022 to ₹377 crore in March 2026, a roughly 9% compound annual decline. "While a section of these drugs is prescription driven, they now have a significant share of OTC purchase which may not be prescription-led and happening through modern trade channels, so people are simply buying them on quick commerce and e-pharma apps now," says Sheetal Sapale, vice-president, commercial, at Pharmarak, explaining the possible reason for dip in offline sales.

Pain relief is now a full-fledged category on quick commerce platforms, sorted by body area (knee, neck, back, abdomen, head), by form (tablet, gel, spray, roll-on, patch, belt), by intent (period pain, gym recovery, migraine, arthritis) and even dosage. You can have a posture-correcting device delivered to your door in under 10 minutes, packed alongside your groceries for the day.

QUICK COMMERCE

This shift has opened up new opportunities for brands in the category. An FMCG marketer whose company makes pain-relief products says their business in this segment has doubled over the past 18 months, almost entirely due to quick commerce. "We've built a portfolio of patches and roll-ons designed for today's consumer—small enough to fit into a work bag, easy to apply without the mess of traditional balms and ointments, which we still make for older users," he says, requesting anonymity.

The deeper advantage lies in what these platforms know about their users, he adds. "Once a quarter, we build cohorts based on data from quick commerce platforms: people who have searched for terms like 'headache' or 'migraine'. A few weeks later, we surface our roll-ons while they're ordering groceries, even if they weren't looking for pain relief at the time." Nearly half end up adding the product to their cart. "Pain relief is a low-ticket, high-frequency category. You're serving both the sedentary consumer dealing with inactivity-related pain and the active one managing muscle recovery pain."

What's driving the growth is who is now living with pain. Saransh Chaudhary, founder of the wellness brand RESET and CEO

of Venus Medicine Research Centre in Panchkula, Haryana, says, "Individuals in their late 20s and 30s are presenting with persistent neck, knee, back and shoulder pain that earlier generations did not experience until much later in life." He attributes the convergence to a familiar set of pressures—sedentary work, prolonged screen exposure, deteriorating sleep, inflammatory diets, chronic low-grade stress. This, he believes, has led to a self-medication culture that has made NSAIDs (nonsteroidal anti-inflammatory drugs) like Advil, Ibuprofen, Aspirin, their default first response.

This tendency to self-diagnose pain isn't new. It comes from a culture that treats pain as too minor to merit serious attention, leaving many people reluctant to see doctors or wary that their concerns will simply be dismissed as "it's just pain." What has changed is the speed and ease of access.

One-pharmacy platforms, a quick search for a muscle relaxant—often discovered through word-of-mouth—can instantly throw up multiple alternatives, including cheaper versions with the same composition. In many cases, pain relief has become faster, easier, and more economical to access than medical care itself.

However, "the long-term implications of this self-diagnosis culture for gastric, renal and hepatic health, while well-documented, are rarely discussed at the consumer level," adds Chaudhary.

A fraction of these relief-seekers is moving past quick fixes. "Until a few years ago, you saw that patients who wanted immediate solutions for acute pain had learnt to live with chronic pain. Now, thanks to social media awareness, many are starting to look for the root cause of their everyday pain," says Akshat Chadha, a Mumbai-based general physician who has practised lifestyle medicine for close to 15 years. "Today, 70-75% patients come with pain as the major issue they want dealt with, and in two-thirds of these cases, you can find and treat the root cause."

A significant cause of these pains, he finds, is psychosomatic—real, physical pain whose source or amplifier is emotional stress rather than structural injury. These include stress-related neck pain, shoulder pain, and pains related to the gut. The International Association for the Study of Pain formally updated the definition of pain in 2020 to acknowledge this duality. Pain, it now reads, is "an unpleasant sensory and emotional experience associated with or resembling that associated with actual or potential tissue damage."

In his practice, Dr Chadha notes that more women than men come to him with pain issues now. "I think it is a sign of women opening up more about their pain, being more receptive to understanding how to deal with it," he says. "It's usually the women accompanying men who tell me about the male patient's pain points."

The change is visible outside his clinic, too. Period cramp playlists populate music-streaming platforms. Many young urban Indian women seem far more comfortable framing their period pain through phrases like "cycle-syncing" and "luteal-phase brain" on social media. Some openly talk about sending care packages on the first day of someone's cycle.

Mumbai-based Rajiv Kaur, 25, represents this transition. As a teenager preparing for her class X board exams in 2017, she developed period cramps so severe she could not turn over in bed; her family physician once flagged the possibility of hospitalisation. "That phase was stressful and my lifestyle wasn't great," she recalls. "I was eating a lot of processed food and ordering frequently from online food delivery platforms. That's when the pain began and progressively worsened."

Her solution at the time was the script most people are handed—pop a painkiller and wait. "Over time my body became so used to them that they stopped working. I was told to increase the dosage." When that didn't help either, at 19, her gynaecologist suggested she go on birth control to stem the pain.

"Something in me resisted taking it because I didn't understand the root cause," says Kaur, who felt it would just give temporary relief. She chanced upon the documentary *Heal* by Kelly Gores, whose central claim was that chronic pain is not normal. It helped her see pain as information. "When people shift from seeing pain as an inconvenience to seeing it as communication from the body, that's when real change begins," Kaur consulted medical and health specialists and built a lifestyle that included an anti-inflammatory diet, cycle-synced workouts that eased off before her period, pranayama, meditation and journaling. On her 20th birthday during the covid lockdown, she marked the day with an online yoga session.

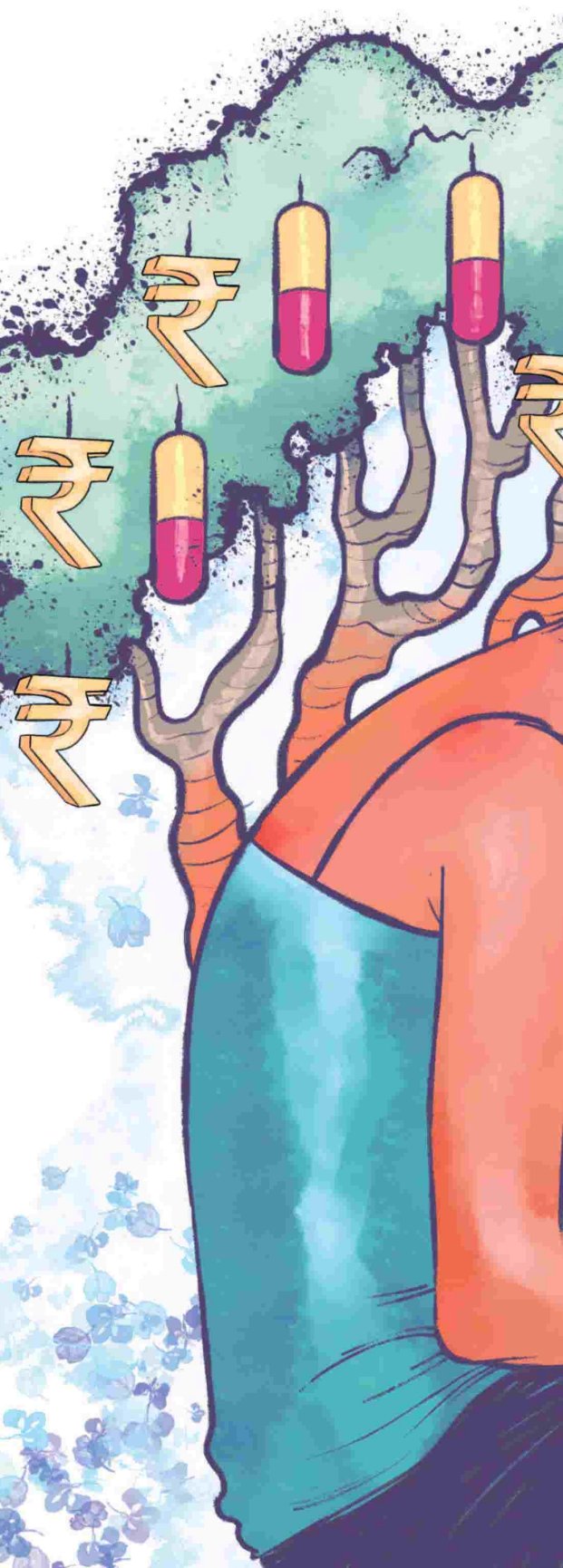
"I realised I had no pain for the first time in my life," she says. "I teared up... I couldn't believe I was moving and completely pain-free." With a degree in nutrition and dietetics and a yoga certification, Kaur today runs a Mumbai-based practice, working with clients dealing with painful periods, PCOS and related conditions. Kaur's are would have been nearly unthinkable a generation ago.

Duru Shah, a gynaecologist who has practised for 45 years in Mumbai's Breach Candy and Jaslok hospitals, remembers a culture in which period pain was something a woman was expected to carry quietly. "Earlier when women complained of period pain—dysmenorrhea—they'd tell their mothers, who would tell them it will go away after you get married and have kids."

Dr Shah runs us through the now-known causes of period pain

Career women are the ones desperate to get period pain relief now. Some come early, others are forced to take action after being taken to the emergency ward.

DURU SHAH
GYNAECOLOGIST



ECONOMY

As we seek relief, while reshaping our understanding of pain and our relationship with it



ILLUSTRATION BY TARUN KUMAR SAHU/MINT

that earlier generations of patients were never told, forget offering a workaround. These include ovulation-led cramps that can be treated with oral contraception; fibroids that may be shrunk medicinally or surgically; endometriosis and four other conditions, traceable, in her telling, through "one ultrasound and a month's observation".

"Today, Dr Shah sees at least one woman a day who comes simply for pain. "Career women are the ones desperate to get period pain relief now. Over time, painkillers are not enough, some come early on, others are forced to take action after being taken to the emergency ward in the middle of the night. Those are the patients who possibly require surgical intervention."

The Indian medical system has also begun to access what was once available only abroad: GnRH (Gonadotropin-releasing hormone) oral antagonists that can ease endometriosis-related pain while lifting patients' quality of life, says Dr Shah.

The flip side, she notes, is that the same channels that have raised women's awareness have also raised the volume of noise. "Almost everyone coming to me with period pain issues thinks they have endometriosis because of the reels they're watching," she says. Dr Shah doesn't fret though. "Forty-five years ago, when I started my practice, I used to worry about asking a woman if she was sexually active. Today, she's seeing women approach her with issues like dyspareunia, or painful intercourse. There are now tools to help women suffering from this, ranging from counselling to medication and exercises."

The system around women in pain has been slower to change. "Pain during active labour was taken for granted earlier," says Dr Shah. "Today, we have epidural anaesthesia. However, epidural facilities are not evenly available across the country, not even all over Mumbai. We don't have so many trained anaesthetists to administer epidural throughout roughly four hours of labour."

Even when the option exists, hesitation is built into the system. M.R. Rajagopal, chairman emeritus of Pallium India, a palliative care trust based in Thiruvananthapuram, experienced this with a family member recently. "A young relative of mine opted for an epidural for labour. In the process of signing the consent, the nurse asked her, 'Are you sure you want this?' That put a seed of doubt in her mind. And in a little while, the nurse in the labour room asked her the same question again. If we had not discussed this within the family, the young woman could well have been frightened enough to accept the needless pain."

In India, the forms of relief reserved for the most severe of pains—from labour to post-surgical and terminal illnesses like cancer—still run up against systemic gaps that the country is yet to address. Dr Rajagopal has spent four decades working on access to pain relief. He led the campaign for India's 2014 amendment to the Narcotic Drugs and Psychotropic Substances (NDPS) Act, intended to ease medical access to morphine. The amendment passed, but the rules that followed introduced new hurdles: a revised draft submitted in 2017 remains pending, and the gap in implementation persists, he explains.

The misconceptions that restrict morphine, Dr Rajagopal says, are as common among doctors as they are among families; that it is only for the dying, and that it inevitably causes addiction. He does not dismiss the risk. "If you ask me whether oral morphine can cause addiction, I must say yes, but rarely," he says. "When morphine is used orally in the right doses to treat cancer pain, the chances of addiction are remote." He doesn't contend whether the risk exists, but the magnitude with which Indian medicine has historically treated it.

The greater cost of withholding morphine, argues Dr Rajagopal, also an adjunct professor of global oncology at Queen's University, Canada, is cognitive. "Pain strips patients of the mental space needed to make decisions, including whether to continue treatment. Once the pain is treated properly, they would have the mind space for clarity of thought and tend to undergo cancer treatment."

The lived shape of that gap sits in a home in Wardha, Maharashtra. S. Tiwari has been looking after his mother, 65, through cancer for three years and two months now. "She finished schooling at the secondary level, married early, has lived independently across several Indian cities, and is acutely capable of reading her own scans," he tells *Lounge*. "On a difficult day, she wishes for her life to end rather than suffer the pain that hits her in waves."

Three out of five times, he says, his mother stabilises before morphine. The other two times, a long morphine tablet at bedtime can avoid the alternative—a drive to the local hospital's palliative ward for injectable pain management. Tiwari sees opioids like morphine as the only silver lining in this rather tough journey. "Any caregiver as well as a person suffering from the pain of an oncological condition will tell you that side effects are not even their last thought. Pain relief overrides everything else," he says. "I'd drive a hundred kilometres just to access a few pills, if needed."

While opioids remain difficult to access in India, they have driven a new wave of pain research in the West. Arnab Barik, assistant professor at the Centre for Neuroscience at the Indian Institute of Science (IISc), Bengaluru, studies the neurology of pain and itch. The field, he says, had largely gone quiet until the mid-2010s opioid epidemic in the US pushed researchers back toward the central nervous system.

Until then, pain medicine had focused mostly on the peripheral nervous system—the network of nerves outside the brain and spinal cord. "You detect pain via the peripheral nervous system. Researchers are now investigating why it occurs by studying the central nervous system that actually feels and responds to the pain."

This shift has opened up non-invasive approaches such as electrical and magnetic brain stimulation, reducing reliance on surgery or long-term medication. At the core of current research, Barik says, is a simple premise: changing how pain is perceived may change how it is experienced. Where exactly that perception is constructed in the brain, however, remains an open question.

ALTERNATIVE THERAPIES

When medical science doesn't have all the answers, many patients turn to alternative therapies. Santoshi Kurada, co-founder of Alleviate Pain Clinics in Bengaluru, has observed that landscape up close. "Yoga and meditation are great for down-regulating the nervous system." But alternative therapies can prove dangerous when applied to acute injury. She remembers a patient with a clear disc prolapse who spent a year getting "vigorous massages" from a local healer. The trauma of the massages caused the disc to break off, leading to a surgical emergency marked by sudden leg weakness and loss of bladder control. "It was a preventable surgical emergency, caused by the delay of 'alternative' promises," she says.

CBD (cannabidiol) is among the newer entries on this fringe, and Dr Kurada is careful about it. "CBD acts very well as a powerful adjunct in chronic inflammatory conditions like arthritis, and in neuropathic pains like diabetic neuropathy," she says. The problem is when it is treated as a replacement for proven medication, she adds. "The CBD medications available over-the-counter are usually under-dosed, and some are mixed with heavy metals that can cause more harm than benefit. It should not be used in mental disorders like acute psychosis and clinical depression—where stopping proven medications like SSRIs or antipsychotics can lead to significant relapse." Her summary is narrow: best for arthritis and nerve pain; not yet enough evidence to make CBD a mainstay for anxiety.

In her decade-long practice, "I've seen patients with completely normal scans suffer with unbearable pain, and the ones with herniated discs on the MRI run marathons," she says. "Most often, patients are not just living with physical injuries. They are living with a nervous system that is severely unregulated."

This does reframe, with some irony, a line long used to dismiss patients: the pain is, indeed, all in your head.

That language is not theoretical for Gurnu-gam-based dentist Anubha Mahajan, 34, who has lived with it for over a decade. She developed complex regional pain syndrome (CRPS) in 2014, "owing to a medical negligence," she says. It's a condition in which "dysfunction in the central or peripheral nervous system" drives severe, persistent pain. The first year was a "hazy mess of days and nights coalescing into one big ball of pain shooting through the body." Tests and consultations led nowhere. "Most of the doctors didn't take it seriously, or gave the incorrect diagnosis," she says. "I began wondering if it was all in my head..."

Relief came a year later, when a correct diagnosis led to a multidisciplinary plan: medication, an anti-inflammatory diet, and cognitive-behavioural therapy (CBT), which works by changing how the brain processes pain—the same mechanism the current global pain management research is beginning to map.

Meanwhile, living with the condition has reshaped Mahajan's relationship with it. "Instead of constantly thinking about it, I made it my life's purpose," she says. In 2017, she founded Chronic Pain India, a not-for-profit that supports patients through community and advocacy. Her current push is to have chronic pain recognised under India's Rights of Persons with Disabilities Act, framing it as an invisible disability that demands visibility.

At the far end of that invisibility, in a darkened bedroom in Bengaluru, sits Ikyatha Yerassala, 39. She hasn't had a pain-free day in over a decade. Without medication, her pain stays at a 9 or 10. She lives with three diagnoses—fibromyalgia, postural orthostatic tachycardia syndrome (POTS), and myalgic encephalomyelitis/chronic fatigue syndrome (ME/CFS), a "neuroimmune, multi-system illness" whose hallmark, in her case, is severe brain inflammation. "My brain has very low tolerance to light, sound and electronic screens, so even minor exertion can lead to a crash," she says. Her room stays dark, screens dimmed, noise kept low. "I haven't stepped out of my house in months."

The treatments that bring some relief feel like they sit at the edge of current pain science. Fibromyalgia, notably, remains one of the conditions with no clear or complete path to pain relief, only management. "I take medicines for POTS to help regulate my nervous system. For pain, I am currently trying the Stellate Ganglion Block procedure (where an injection of local anaesthesia is administered into a bundle of nerves in the front of the neck called the stellate ganglion...). Another treatment that gave me relief from chronic pain was taking ketamine infusions. I have recently started a new migraine medication. "Energy healing did not help." For me, it's only western medication that has worked."

A media professional who runs Instagram channel Slanguaru on Kannada slang, she stays connected to the outside world largely through her phone. Her closest support is another ME/CFS patient in Mumbai, who is also bed-bound and whom she met online. They speak every day. "Because we understand each other's conditions and what our lives are like, it's become routine for us to talk every day."

It has reduced life to the simpler things, says Yerassala. "A healthy person can have a thousand problems," she says, "but for a person who doesn't have health, there is only one problem."

For Israni, pain is the one problem standing between him and the sport he has loved since childhood. "I keep watching interviews of tennis players playing on the pro tour with chronic injuries," he says. "It motivates me to recover to get back to playing tennis." The rally, in other words, is still on.

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quick BITES

INDICATORS	%
Sensex	77,328.19 -0.66
Nifty 50	24,176.15 -0.62
S&P 500*	7,391.34 0.74
Dollar (₹)	94.47 0.22
Pound Sterling (₹)	128.64 0.23
Euro (₹)	111.20 0.24
Gold (10gm) (₹)	152,814,553 0.36
Brent crude (\$/bbl)	101.34 1.28
IN 10-Yr bond yield	6.984 0.74
US 10-Yr 'Bill' yield	4.378 -0.016

* As of 8:30 PM IST

Ashok Kumar takes charge as Niti vice chair

Renowned economist Ashok Kumar Lahiri on Friday took charge as vice chairman of NITI Aayog. Lahiri replaced Suman Bery. Lahiri is a former chief economic advisor to Indian government and a member of the 15th Finance Commission. "His experience across academia, institutions and global organisations will strengthen NITI Aayog's efforts towards policymaking and economic transformation," it said.



Home, auto EMIs may go up as banks' NIM erodes

Market conditions appear sticky with regard to deposit pricing

FALAKNAAZ SYED
MUMBAI, MAY 8

Borrowers who have benefited from lower interest rates over the past year may soon have to brace for higher equated monthly installments (EMIs) as top lenders such as State Bank of India (SBI) and Bank of Baroda (BoB) on Friday signalled a likely increase in lending rates to protect profitability. Banks are currently facing challenges in mobilising deposits and are unable to reduce deposit rates further as they need adequate funds to sustain healthy credit growth. At the same time, lending rates have declined in recent months after the Reserve Bank of India cut the repo rate by 125 basis points since Feb 2025.

SBI chairman C S Setty said banks may now have to reprice loans upward because there is limited room for further cuts in deposit rates. "I do not think there is much room for further cuts in deposit rates because of credit growth continues at 13-15 per cent, none of us in the system would be in a position to cut deposit rates. So there

will be some repricing on asset (loan) side. This is what we are building into our model and, depending on how the year progresses, we will take a call," Setty told reporters at the bank's Q4 FY26 earnings press conference. Setty said the bank is targeting a NIM of 3 per cent in FY27. "The 3 per cent NIM guidance is based on several assumptions. One is that there

THIN MARGINS

SBI's consolidated net profit for FY26 rises 13% to ₹8,298.78 cr. For March qtr consolidated net profit stands at ₹19,642.87 crore, up 5.6%.

ON CONSOLIDATED basis, SBI's Q4 FY26 total income increased to ₹1.81 lakh cr from ₹1.79 lakh cr.

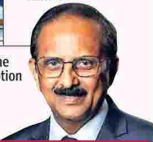


Our view is that the repo rate will continue at same level throughout FY27. So, that is the first assumption we are making which means that neither deposit rates are likely to go up nor yields are likely to go up.



— C.S. SETTY, SBI chairman

- BoB's net profit for Q4 FY26 stands at ₹5,616 crore (11.2% YoY), ₹20,021 cr (2.2% YoY) for FY26.
- SBI's domestic NIM decreases by 21 bps YoY, 18 bps QoQ to 2.93%.
- SBI will dilute some of its stake in NSE in its IPO.



A similar view was expressed by Bank of Baroda managing director and chief executive officer Debadatta Chand during the bank's Q4 FY26 earnings call. "Market at this level appear sticky with regard to deposit pricing. In such a scenario, the only thing I expect in this quarter is resetting on the advances side, subject to market conditions," Chand said.

will be no change in the repo rate. Our view is that the repo rate will remain at the same level throughout FY27. That means neither deposit rates nor yields are likely to move significantly," he said. Yields could improve because of changes in the bank's asset mix as some corporate floating-rate loans run off, allowing the bank to pass on higher deposit costs, he said.

technology and connectivity between the two countries. Under the pact, Vietjet and GMR Airports will explore opportunities to jointly develop air connectivity, infrastructure, logistics, aviation services, smart airports and long-term investment initiatives. The pact with Bird Group will focus on ground handling services, training, aviation technology and travel, it said.

The agreements pave the way for cooperation between India and Vietnam across segments while contributing to economic, trade and people-to-people connectivity between two countries, it said. —PTI

Vietjet in deals with GMR Airports, Bird Group

Mumbai, May 8: Vietnamese private carrier Vietjet on Friday announced signing agreements with India's GMR Airports and Bird Group for cooperation in aviation infrastructure, services,

Hold US trade deal till tariff regime stabilises, says GTRI

SANGEETHA G.
CHENNAI, MAY 8

India should wait for greater clarity in the United States' trade policy before concluding a bilateral trade agreement, economic think tank GTRI said after a US court struck down President Donald Trump's 10 per cent global tariffs.

The United States Court of International Trade on May 7 invalidated the tariffs imposed under Section 122 of the Trade Act, calling them "invalid" and "unauthorised by law." The court said the provision was meant to address balance of payments emergencies and not broad tariff measures aimed at reducing trade deficits.

The tariffs had been imposed on February 20, 2025, hours after the US Supreme Court struck down the Trump administration's reciprocal tariffs. According to GTRI, the repeated judicial setbacks to Trump-era tariffs have created significant uncertainty around the US trade regime. "India should wait until the US

AWAITING CLARITY

- Uncertainty remains and India should keep trade deal on hold till there is more clarity
- With both reciprocal tariffs, Section 122 tariffs now invalidated by courts, the US tariff system returning to pre-Trump structure
- Now, tariffs based on standard most-favoured-nation (MFN) rates under the WTO framework.



develops a more stable and legally reliable trade system before concluding the Bilateral Trade Agreement. The continuing uncertainty around US tariff policy with major Trump-era tariffs repeatedly struck down by courts, makes any long-term trade commitment by India difficult to justify," GTRI said.

While the latest court ruling offers temporary relief to exporters and importers, uncertainty remains because the decision currently applies only to the parties involved in the case—the state of Washington, spice

importer Durlap & Barrel and toy maker Basic Fun. The tariffs will continue for other importers while the US government appeals the ruling. The court also declined to block the tariffs nationwide at this stage.

However, GTRI said the Trump administration is now expected to rely more heavily on targeted trade actions such as Section 301 investigations and Section 232 national-security tariffs. These measures could be used against partners in steel, semiconductors, automobiles, pharma and minerals, it said.

Tata Trusts meeting rescheduled to May 16

FC CORRESPONDENT
MUMBAI, MAY 8

A scheduled meeting of the trustees of Sir Ratan Tata Trust (SRTT) on Friday (May 8) has been postponed to May 16, 2026 as per reports.

The agenda of the SRTT meeting included reconsideration of Tata Trusts' representation on Board

of Tata Sons, the holding company of Tata Group. Earlier, the Bombay High Court declined to stay the proposed meeting of Sir Ratan Tata Trust on a writ petition filed arguing that Trust's current board composition breaches statutory limits introduced under Maharashtra Public Trust Act 2025.

At present, Tata Trusts chairman Noel Tata and vice-chairman Yenu Srinivasan are on the board of Tata Sons, the reports indicated. The Friday board meeting was planned amid two trustees are publicly recommending listing of Tata Sons, a stand that Tata is totally against.

GAMES

ORANGE PURPLE

Heinrich Klaasen, SRH	Bhuvneshwar Kumar, RCB
494	17
Abhishek Sharma, SRH	Anshul Kamboj, CSK
475	17
K. L. Rahul, DC	Prince Yadav, LSG
468	16

short take

KSCA's 10k passes caused final shift

The Karnataka State Cricket Association's request for additional 10,057 complimentary tickets led to the shifting of IPL final and playoff matches from the M. Chinnaswamy Stadium here, a BCCI source has said. Bengaluru was to host the final going by convention as Royal Challengers Bengaluru are the defending champions.

But IPL chairman Arun Dhumal told that it became "untenable" to have the finale here due to demand for complimentary tickets at the relatively low-capacity venue which can only accommodate 35,000 fans. This season's playoff fixtures will be held in Dharamsala (May 29) and New Chandigarh (May 27 and 28) while the title clash (May 31) will be staged at the Narendra Modi Stadium in Ahmedabad. In that, the association needed around 900 passes to meet the demands of the state MILAs alone. —PTI

IT A FINNISH!

Allen's century powers Kolkata past Capitals

New Delhi, May 8: Kolkata Knight Riders' spinners strangled Delhi Capitals with a ruthless choke before Finn Allen unleashed a brutal six-hitting exhibition to power the visitors to a comfortable eight-wicket win and reignite their IPL playoff hopes here on Friday.

The spin trio of Anukul Roy (2/31), Sunil Narine (1/17) and Varun Chakravarthy (0/28), stifled Delhi's batting line-up, restricting them to a modest 142 for 8 despite a sparkling 29-ball 50 from Patham Nissanka.

Impact substitute Allen then produced a fearless knock at the top. The Kiwi hit an astonishing 10 sixes and five fours in his unbeaten 47-ball 100 as KKR chased down the target on 142 overs.

The win, KKR's fourth on trot, catapulted them to seventh place while the loss, DC's seventh in 11 games this season, left all but killed their chances of making the Playoffs.

Defending a below-par total, Delhi desperately searched for early breakthroughs and briefly found hope through moments of fortune. Ajitva Rahane was run out after the ball brushed Mitchell Starc's fingertips onto the stumps at the non-striker's end, while Angkrish Raghunathi never lost sight of the chase as he dismantled the DC attack with clean hitting and aggressive intent.

Earlier, if it wasn't for Ashutosh Sharma's 39 off 28 balls which was laced with three boundaries and as many sixes, DC would have struggled to even cross the 100-run mark. KKR's pacers complemented the spinners superbly, with Kartik Tyagi (2/25), Vaibhav Arora (1/29) and Cameron Green (1/12) striking at key moments to ensure Delhi never found sus-



Finn Allen (left) of the Kolkata Knight Riders celebrates his century against Delhi Capitals during their IPL match at the Arun Jaitley Stadium in New Delhi on Friday.

Delhi Capitals:		Kolkata Knight Riders:	
Delhi Capitals:	Patham Nissanka st Angkrish Raghunathi b Roy 50, K. L. Rahul c Cameron Green b Kartik Tyagi 21, Nitish Rana c Narine b Green 8, Sameer Rizvi c Powell b Narine 3, Tristan Stubbs b Roy 2, Axar Patel c Roy b Arora 11, Ashutosh Sharma c Rahane b Kartik Tyagi 39, Viraj Nigam not out 3, Mitchell Starc run out 0, Lungi Ngidi not out 1. Extras (w 2) 2. Total (for 8 wickets in 20 overs) 142.	Kolkata Knight Riders:	Ajinkya Rahane run out (Starc) 13, Finn Allen not out 100, Angkrish Raghunathi b Patel 1, Cameron Green not out 33. Total (for 2 wickets in 14.2 overs) 147.
Fall of wickets:	1-49, 2-74, 3-80, 4-85, 5-89, 6-128, 7-140, 8-140.	Bowling:	Anukul Roy 4-0-31-2, Vaibhav Arora 3-0-29-1, Sunil Narine 4-0-17-1, Kartik Tyagi 4-0-25-2, Varun Chakravarthy 4-0-28-0, Cameron Green 1-0-12-1.
			Total (for 2 wickets in 14.2 overs) 147.
			Bowling: Mitchell Starc 3-0-31-0, Axar Patel 4-0-27-1, Lungi Ngidi 2-0-7-0, Viraj Nigam 2-0-34-0, Kuldeep Yadav 3-0-41-0, Mukesh Kumar 0-2-0-7-0.

Teams	POINTS TABLE					
	P	W	L	N/R	Points	Net RR
SRH	11	7	4	0	14	+0.737
PBKS	10	6	3	1	13	+0.571
RCB	10	6	4	0	12	+1.234
RR	10	6	4	0	12	+0.510
GT	10	6	4	0	12	-0.147
CSK	10	5	5	0	10	+0.151
KKR	10	4	5	1	9	-0.169
DC	11	4	7	0	8	-1.154
MI	10	3	7	0	6	-0.649
LSG	10	3	7	0	6	-0.934

GT vs Royals in battle of equals

Jaipur, May 8: An upbeat Gujarat Titans will be determined to continue their winning streak and leapfrog a wobbly Rajasthan Royals in their mid-table Indian Premier League clash here on Saturday.

Only the net run rate separates the 2022 edition winners Gujarat Titans (0.147) from the fourth-ranked 2008 champion Rajasthan Royals (0.510) in the points table as the two teams have fared alike so far. Both GT and RR have six wins and four defeats in 10 matches each.

But the Shubman Gill-led side will fancy their chances against the wobbly Royals, who have suffered three defeats in their last five matches. The Titans have racked up three wins on the trot and looking to break into the top four.

Royal captain Riyan Parag struck 90 in RR's first-innings score of 225 for six but it was not enough against Delhi Capitals who overhauled it with seven wickets and five balls to spare. It was the second such instance in a run when a first-innings total in excess of 220 could not be defended by the Royals.

IPL 2026 Match: 52	
May 9, 7:30 pm	
Sawai Mansingh Stadium, Jaipur	
Rajasthan Royals	Gujarat Titans
Overall in IPL	
246 Played	70
122 Won	43
121 Lost	27
3 No Result	-
242/6 Highest Total	233/3
Head-to-Head in IPL	
Matches Played: 9	
RR Won: 3	GT Won: 6

Jurel has undoubtedly been a vital cog the Royals' batting line-up, but the right-handed batter has been guilty of not accelerating at the top. In his last three outings, Jurel has scored 42 off 30 balls, 16 off 20 balls, and 42 off 30 balls at No. 3 and these numbers certainly warrant improvement. On their part, the Titans will be pleased at how they are peaking at the right time. Gill (378 runs) has been a consistent run-getter and will be keen on converting his start into a big score, while Sai Sudharsan (385) will also be determined to make the most of his form, having struck two fifties and a hundred in his last four outings. —PTI

Pvt investment in data centres augurs well for India's AI ambitions

THE \$15 billion bet by Google to develop an AI data centre hub in Visakhapatnam reflects India's ambitions in the digital space. From being an IT services hub for the world, the country is slowly building data centres keeping with the acceleration of the AI wave. Not to be caught napping, many domestic corporate houses have jumped onto the bandwagon. Reports are that Reliance is planning to invest around \$17 billion on a 1.5 giga watt solar data centre cluster along with captive solar and battery storage systems in Visakhapatnam. TCS forayed into data centre business through its sub-

sidiary 'HyperVault' and roped in PE major, TPG. Tata Group is planning to invest around \$7 billion over the next 5-7 years for building a 1 Giga Watt AI-ready sovereign data centre. In fact, there are many established players in India that are already operating in the data centre business. Recently, Bhavani and Sarvam have announced that they would build India's first orbital AI data centre satellite in space, which will be used as a data centre, from where all AI-based computing will be done. These developments indicate that India is gradually growing into a data centre giant. And the rea-

sons are many. Firstly, the importance of sovereign data centres is growing. Sensitive data points of Indian citizens should be kept within the boundaries of the country. Despite ranking high as an internet user base, currently most of the data related to Indians is not stored within the country, which is seemingly a threat to India's national security. Given that wars are becoming technologically advanced, any vulnerability with respect to citizen's data can be a major threat.

Secondly, India wants to be a leading country in the AI space. Given the country has a robust IT services

industry with a growing GCC ecosystem, such an ambition is quite natural. However, AI-powered solutions and platforms can't be developed without a vibrant set of data because data sits at the core of any AI-powered system. If India wants to be a powerhouse in AI space, it must create its own data centre to safeguard internal data. Without such domestically produced data sets, the country can't produce its own AI-powered solutions and platforms. So, indigenous innovation requires sovereign upkeeping of data sets.

Last but not the least, India requires its own AI startups, ILMs and

customised solutions. It has been seen that India has a unique set of problems, which require an equally localised unique approach for solutions. Sadly, India has been dominated by the US technology firms with millions of users operating US models and solutions. This creates a great deal of dependency on the US, which can't be exploited. For making India digitally self-dependent, the country requires its own AI models, and solutions. Against this backdrop, the moves by Google, Reliance, TCS, and others will help power India as an AI global centre for AI.

LETTERS

In TN, politics and movies go hand in hand

APROPOS of "The curse of cinema and Dravidian politics" (THI May 7). Admittedly, I was surprised at the heading of the editorial. Singularly, it is with extreme emotion that people of Tamil Nadu take to stars and movies. To term cinema's influence on Tamil politics a 'curse' was inappropriate. It is this highly charged emotion that saw many people take their lives on MGR's demise. Authorities took precaution and time to announce the demise of Jayalalitha to prevent a similar tragic fallout. As mentioned in the editorial, it must have been the Brahminical scheme of things sitting heavily on a people born into and bred on Dravidian credentials that have permitted cinema influence politics in Tamil Nadu. Irrespective, one hopes that Ilaya Thalapathy translates real life into real life, if he dons the chief ministerial garb.

Dr George Jacob, Kochi

Centre must ensure better last-mile delivery

THIS is further to the column "Narendra Modi: A tsunami of change" (THI May 8) K Krishna Sagar Rao captures the scale of political transformation under Prime Minister Modi quite effectively. The erosion of old dynastic and regional monopolies has indeed reshaped the electoral map. Yet one cannot help but wonder whether this momentum will translate into deeper, more consistent governance reforms across states. The real challenge lies in strengthening institutions and improving last-mile delivery. Greater emphasis on transparent implementation, civil service accountability, and genuine federal cooperation would help sustain these gains. Regular performance audits and closer engagement with state-level administrators could bridge the gap between political success and everyday governance outcomes. Only then can the tsunami truly reshape India for the long term.

Prakash Paramasivan, Neelambur-641048

Focus on timely release of emergency credit

APROPOS of "Turning credit into lifelines: Real test is in implementation" (THI, May 8), the expanded credit support for MSMEs and airlines is timely, but its value will depend entirely on efficient execution. In many cases, deservingly firms lose out because procedures remain opaque and approvals move slowly. Banks must be encouraged to process applications with greater flexibility while maintaining accountability. Rural and small-town enterprises also need clearer guidance on eligibility and documentation. Periodic regular review of disbursement data, along with prompt grievance redressal, would improve transparency and ensure that emergency credit reaches businesses before financial stress deepens further.

Swathi Senthilkumar, Sular

Emergency liquidity, a boon for MSMEs

APROPOS "Turning credit into lifelines: Real test is in implementation". The expansion of the Emergency Credit Line Guarantee Scheme is a timely intervention, especially as MSMEs and the aviation sector grapple with global supply disruptions and rising fuel costs. While the financial outlook is significant, the success of this initiative hinges entirely on the ground-level response of lending institutions. In the past, despite government guarantees, many small-scale borrowers have faced bureaucratic hurdles or hesitant bankers, who remain overly risk averse. To ensure this credit reaches the "lifeline" stage, the government must simplify the documentation process for rural enterprises and establish a transparent grievance mechanism for those facing arbitrary delays. Monitoring the end-use of funds is necessary, but it should not become a bottleneck that defeats the purpose of emergency liquidity. Swift, efficient disbursement is what will help sustain jobs and stabilise supply chains.

K P Mathukumar, Chennai-53

Durable democracies need competitive politics

THIS refers to the article "Narendra Modi: A Tsunami of Change" (THI, May 8). It presents a detailed account of BJP's electoral expansion over the past decade. The organisational reach, welfare delivery, and aspirational messaging the author describes are real factors that explain the party's growth across previously resistant states. However, describing any political leader as a tsunami, risks collapsing the distinction between electoral success and democratic health. Strong mandates are not the same as strong institutions. India's opposition fragmentation, weakening of regional alternatives, and shrinking space for dissent are equally part of this political story. Durable democracies require competitive politics, not permanent dominance. Voters have clearly responded to Modi's leadership. Whether the institutional framework that sustains democratic accountability has kept pace with that electoral transformation is a question the article does not ask, which it ought to have.

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BENGALURU ONLINE

IPL final shifted over alleged demand for 10,000 free tickets: BCCI

BENGALURU: A major controversy has erupted after BCCI secretary Devajit Salkia reportedly revealed that the IPL final was shifted out of Bengaluru not because of stadium capacity issues, but due to the state government's alleged demand for 10,000 free VVIP tickets.

The revelation has triggered sharp political reactions and widespread anger among Royal Challengers Bengaluru (RCB) fans, who were hoping to witness the high-voltage final match at the M. Chinnaswamy Stadium. For the past few days, the Congress-led Karnataka government had maintained that Bengaluru lost hosting rights because of limited seating capacity at the stadium. However, the latest statement attributed to the BCCI secretary has exposed what critics are calling the "real reason" behind the shift.

Read more at <https://epaper.thehansindia.com>

Vijaypath begins: TN's Dravidian order faces its biggest earthquake since 1967



BOLD talk
V RAMU SARMA

BEYOND DMK AND AIADMK: THE RISE OF A NEW TAMIL NADU

This was not politics of ideology. It was politics of fear.

AFTER four days of extraordinary political turbulence — perhaps the most dramatic since the rise of the Dravidian order in 1967 — the road now appears cleared for Vijay and the Tamilara Vetri Kazhagam (TVK) to form the government. The Congress, CPI and CPM have extended support, enabling Vijay to cross the majority mark and setting the stage for what could become Tamil Nadu's first genuine political transition in half a century. Each supporting party is expected to receive a Cabinet berth.

The past four days, however, exposed one of the ugliest spectacles of opportunistic politics the State has witnessed in decades.

Virtually every major political formation appeared less interested in respecting the people's verdict than in the same, cynical instinct: survival at any cost. But one thing that needs to be seen is that these parties too were part of DMK, which was perceived as heading a corrupt government. People voted against them. Now they are part of TVK. The big question is can he keep up his word of corrupt free government?

As the deadlock deepened, both DMK and AIADMK camps signalled that if Vijay failed to form the government within 48 hours, alternate combinations would be explored. In most democracies, parties that suffer electoral setbacks pause for introspection. In Tamil Nadu, defeated camps appeared more eager to subvert the public mandate than to understand it.

Most astonishing was the whispered possibility of a tacit understanding between the DMK and AIADMK — two parties that built their political identities on fierce hostility toward each other for over five decades. If such an arrangement had materialised, it would have represented the final ideological collapse of the old Dravidian binaries that dominated Tamil Nadu politics for generations.

The obvious question is why is the establishment so desperate to prevent Vijay from going of-fice and providing his majority to the Assembly floor? The answer is equally obvious. The old order fears displacement.

For nearly six decades, Tamil Nadu politics revolved around the DMK-AIADMK axis. Elections, alliances, cinema, welfare politics, caste calculations and ideological discourse all operated within that framework. Vijay's emergence has disrupted not merely electoral arithmetic, but the emotional chemistry of Tamil Nadu politics.

The anxiety within the two Dravidian camps stems from one possibility: if Vijay is allowed to govern — even briefly — and manages to project efficiency, anti-corruption credentials, administrative energy and



CM Vijay Vignesh? TVK Has Backing Of Cong, VCK, & Left, say Sources

Tamil Nadu's post-election turmoil has exposed the deep insecurity of its entrenched political order. As Congress and the Left back Vijay's TVK, the state appears poised for its first real post-Dravidian transition in decades. But while Vijay has shattered the DMK-AIADMK monopoly, his greatest challenge

begins now: transforming cinematic charisma and ambitious promises into credible governance amid fiscal strain, political hostility and soaring public expectations.

aspirational politics, he could permanently fracture the monopoly of the traditional parties. What they fear is not merely another rival, but the emergence of a mass phenomenon comparable to M G Ramachandran (MGR).

Yet the real test for Vijay begins only now.

Campaign rhetoric is easy; governance is unforgiving. Vijay must simultaneously manage alliance compulsions while attempting to fulfil the sweeping promises that powered his campaign. His 'nine guarantees' were ambitious, expansive and financially daunting. He promised ₹250 monthly assistance for women heads of households below 60 years, free bus travel for women, six free LPG cylinders annually, marriage assistance schemes, interest-free loans for women's self-help groups, and a separate department for women, children and senior citizens. He promised ₹25 lakh health insurance coverage for every family, improved healthcare infrastructure and a "Citizen Privilege Card" aimed at reducing corruption and bureaucratic harassment.

On education, he promised five higher education for farmers' children, interest-free education loans up to ₹20 lakh, 500 creative residential schools, timely examinations and financial support to prevent school dropouts. For youth, the promises were even more ambitious: five lakh government jobs, 50 lakh internships annually, ₹9,000 unemployment assistance for graduates, post-graduate opportunities for students in private-sector jobs, and major AI and technology skill-development initiatives.

Farmers and fishermen were promised farm loan waivers for small farmers, 100% crop insurance, enhanced MSP for sugarcane and free education for their children.

These promises generated enormous emotional resonance among younger and economically stressed voters. But delivery will be extraordinarily difficult. Tamil Nadu already faces mounting fiscal pressures, rising welfare burdens and slowing revenue expansion. Vijay will quickly discover that governance is not cinema, and slogans do not automati-

cally translate into administrative capacity. If he fails to show measurable progress within the first two years, the same emotional decelerator that lifted him could rapidly turn impatient.

Still, his rise reflects a deeper structural shift underway in Tamil Nadu.

The AIADMK no longer possesses a charismatic figure capable of emotionally mobilising voters across regions and caste lines. The DMK under M K Stalin remains organisationally formidable, but it no longer commands the emotional dominance once enjoyed by earlier Dravidian icons like M Karunanidhi or J Jayalalitha. Simultaneously, younger voters appear less invested in traditional Dravidian rhetoric and increasingly focused on jobs, investment, corruption, governance quality and upward mobility.

That is why 2026 feels fundamentally different from earlier Dravidian crises. Tamil Nadu has witnessed several turning points before — the 1967 defeat of Congress, MGR's split from the DMK in 1972, the AIADMK fragmentation after MGR's death in 1987, the anti-Jayalalitha wave of 1996, and the instability following her death in 2016. Yet every upheaval eventually returned to the familiar DMK-versus-AIADMK framework.

This time, that framework itself appears to be weakening. The constitutional handling of the post-election situation has also raised troubling questions. Conventionally, when a party emerges as the single largest formation and falls short by only a few legislators, it is ordinarily invited to form

a minority government and prove its majority on the floor of the House.

The delay in inviting Vijay to form the government inevitably fuelled allegations that the Government was under intense political pressure and that constitutional processes were being stretched to facilitate backroom negotiations. Whether entirely fair or not, such perceptions damage institutional credibility.

The BJP, too, faces uncomfortable questions. Allegations persist that sections within the party preferred engineering alternative combinations merely to prevent Vijay's rise, even if it meant indirectly benefiting the very Dravidian forces the party has spent years attacking. Ironically, this resembles the same "outside support" politics once mastered by the Congress at the Centre — exercising influence without assuming responsibility. India's political history is littered with such unstable arrangements. The Charan Singh government in 1979, Chandrashekhar's government in 1990, and the Deve Gowda and I K Gujral governments in the 1990s all collapsed under similar political manipulations.

Tamil Nadu may now be entering not merely another electoral cycle, but a genuine post-Dravidian transition — one where old ideological certainty is eroding, and economic monopolies are fading, and voters are searching for a new political grammar.

Whether Vijay ultimately succeeds or fails is still uncertain. But one reality is already undeniable: the old order is no longer invincible.

(The author is former Chief Editor of The Hans India)

When the guardian of constitution gags

CHOLLETTI

THERE is a tension at the heart of Indian constitutional democracy that deserves far more scrutiny than it receives. It is the tension between a judiciary that is meant to protect free speech and, at times, becomes its most powerful suppressor. Nowhere is this contradiction more visible than in Hyderabad, where gag orders have been imposed on media reporting in cases involving singer Mangli and actress Ashu Reddy — matters that entered the public domain once FIRs were registered and criminal proceedings began.

Article 19(1)(a) guarantees freedom of speech and expression. The framers placed it at the centre of the fundamental rights chapter because they knew from colonial censorship, that democratic freedom depends on the ability to speak, publish and criticise. Yet Article 19(2) permits reasonable restrictions in the interests of public order, decency, defamation, contempt of court, and related concerns.

The key word is "reasonable." It was meant to act as a constitutional brake on overreach. Too often, however, it has not functioned that way. Over time, restrictions that were supposed to be narrow and exceptional have sometimes expanded into broad restraints that silence speech before it is even heard. When a court orders that something cannot be published before publication, the public never knows what it has been denied. The suppression leaves

no visible trace. The Supreme Court recognised this danger as far back as *Brij Bhushan v. State of Delhi* in 1950, when it struck down pre-censorship of a newspaper. But the presumption against prior restraint has weakened in practice.

The Hyderabad cases sharpen the problem. In matters involving Mangli and Ashu Reddy, the issue is no longer confined to private reputation. Once FIRs are filed, the state has already entered the picture. The criminal justice system has begun operating in the public's name, using public authority, public institutions, and public resources.

That changes the nature of the matter. Criminal proceedings are not private disputes hidden from scrutiny. They are public processes. Police investigate in the name of the state. Prosecutors act as public officers. Courts adjudicate in open proceedings. Reporting on how that power is exercised is not sensationalism; it is one of journalism's most important democratic functions.

This is why gag orders in such cases raise difficult questions. If FIRs and charge sheets are public records, what is the constitutional logic of shielding their substance from public discussion? If the state has already initiated a criminal process, why should there be a bar on the media from reporting the facts and progress of that process? And how far can a court go in protecting reputations before it begins to shut down legitimate scrutiny of public institutions?

The judiciary's blind spot:

Courts are public institutions. They exercise public power in the name of the public. The public therefore has a legitimate interest not only in the final judgment but also in how proceedings unfold, how orders are framed, and whether justice is moving fairly and promptly.

A gag order that incidentally prevents reporting on these aspects can collide with the principle of open justice.

That is not to say courts act with bad intent. The concern for fair trial, privacy, and dignity is real and legitimate. Media trials in India have often been reckless, sensationalist, and sometimes outright false. Judges are right to worry about the impact of irresponsible reporting on pending cases. But concern alone does not justify sweeping remedies. The response to bad journalism should be proportionate accountability, not blanket silence.

Targeted defamation action, contempt proceedings, where appropriate and narrowly tailored orders are better tools than ex parte gag orders that prohibit coverage for long periods, sometimes across the entire life of a case. When the remedy is broader than the harm, the constitutional balance begins to fail.

The media isn't blameless: A serious argument for press freedom cannot rely on the assumption that the media is always virtuous. That would be dishonest. Indian television news, and increasingly digital media, has repeatedly crossed



the line into trial by broadcast.

In high-profile cases, accused persons are treated as guilty before any court has spoken. Victims are re-traumatised through invasive coverage. Allegations become facts by repetition.

Celebrity cases make this worse. Public curiosity, competitive pressure, and social media attention often push journalists toward spectacle instead of restraint. The line between reporting and entertainment becomes dangerously thin. In that environment, a court's fear of media excess is not imaginary.

Mangli and Ashu Reddy are not abstract legal subjects. They are people with rights to dignity, privacy, and the presumption of innocence. The existence of an FIR does not mean that every aspect of their personal life becomes fair game. There is a difference between reporting on criminal proceedings, which is clearly in the public interest, and intruding into irrelevant private details merely because a person is famous.

This is where the media's complaint about gag orders is partly justified and partly weakened by its own record. The press is right to resist over-broad restraints. But its moral authority is reduced when it refuses to acknowledge how often it has abused freedom in

the first place.

A genuinely constitutional approach must begin with a strong presumption against prior restraint. Anyone seeking a gag order should have to show specific, imminent, and irreparable harm that cannot be addressed by less restrictive means. That is a high burden, and it should be.

The framework laid down in *R Rajagopal v. State of Tamil Nadu* remains highly relevant here. The Supreme Court had then drawn a meaningful balance between privacy and the public's right to know, especially where public figures are concerned. The principle is simple but important: public status does not erase privacy, but privacy cannot be used as a blanket shield against scrutiny of public acts. That balance is still workable, but it is not applied as consistently as it should be.

Procedure matters as much as principles. Affected media organisations should be heard before gag orders are passed. Ex parte restraints on publication are constitutionally troubling because they silence speech before any meaningful contest over the facts or the law can occur. If restraint is truly necessary, it should be specific, limited, and time bound. It should target only the material that would directly prejudice a fair trial, not impose a blanket blackout on an entire case.

The media, in turn, must strengthen its own standards. Voluntary editorial restraint, independent fact checking, and seriousness about fair re-

porting are better than waiting for courts to impose silence. If the press cannot regulate itself, it weakens its own case against judicial overreach.

There is a deep paradox in a judiciary that invokes the rule of law to silence reporting on how it enforces the rule of law. There is an equally deep paradox in a media system that invokes the public's right to know while trampling on an individual's right to dignity and innocence.

Both paradoxes are visible in Hyderabad. On one side are courts trying to prevent prejudice, reputational harm, and media excess. On the other are journalists who see gag orders as a threat to transparency and public accountability. Both concerns are real. Neither side is wholly right. That is precisely why a careful constitutional balance is needed.

The danger is that the law increasingly treats silence as the safer option. But democracy does not thrive on convenient silence. It thrives on scrutiny, argument, and institutions that can withstand public attention. The judiciary's role is to protect fair trial rights, but it should do so with precision, not broad censorship. The media should defend press freedom, but it should do so with discipline, not sensationalism.

If that balance is lost, both institutions weaken. The public gets less information and not more justice. And the constitutional promise of free expression becomes a right without effect in theory but narrowed in practice.

(The writer is with The Cholleti BlackRobe Chambers, Hyderabad.)

The Tribune

ESTABLISHED IN 1881

Law under scrutiny

Selection of ECI trio must be beyond reproach

A MID a heated debate about the role played by the Election Commission of India (ECI) in the just-concluded West Bengal elections, the very law governing the appointment of the poll panel's members is under judicial scrutiny. The Supreme Court is hearing arguments on a batch of pleas challenging the validity of the Chief Election Commissioner and Other Election Commissioners (Appointment, Conditions of Service and Term of Office) Act, 2023. In its March 2023 verdict, the Court had ordered that the ECI's members be appointed on the advice of a committee comprising the Prime Minister, the Chief Justice of India (CJI) and the Leader of the Opposition (LoP) in the Lok Sabha — till a law was made by Parliament. The law, which was eventually enacted in December that year, excluded the CJI from the selection process; instead, it included a Union Cabinet minister — to be nominated by the PM — among the committee's three members.

It's obvious that this arrangement gives an edge to the executive, represented by the PM and the Cabinet minister, whose recommendations will count even if the LoP disagrees with them. Even as the ECI continues to be under fire from the Opposition over the Special Intensive Revision (SIR) of electoral rolls in Bengal, it's imperative to devise a fair mechanism for these vital appointments.

The independence of the ECI is a constitutional mandate. It can ensure free and fair elections across the country only if it is insulated from executive interference. The Court has stated that its 2023 judgment did not lay down norms for Parliament to frame the law in any particular manner. Thus, the onus is on the legislature to take the initiative of amending the Act so that no questions or doubts are raised about the appointment of the Chief Election Commissioner and two Election Commissioners. At stake is the ECI's credibility — and also the health of our electoral democracy. 'One Nation, One Election' can wait; the priority right now should be to make the law loophole-free.

Drug deaths

NCRB data shows the net is only widening

IT may not give the entire picture and there is no denying that drug overdose deaths often go unreported, but the significance of the National Crime Records Bureau (NCRB) data lies in the insights it provides. According to the latest report, of the 978 drug overdose deaths reported across India in 2024, Tamil Nadu accounted for 313, followed by Punjab at 106. Punjab has shed the dubious distinction of leading the tally, but the situation on the ground remains worrying. The number of deaths has gone up from 89 in 2023, when the national tally was 654. What's more alarming, the drug net is widening. Himachal Pradesh reported 31 deaths, up from 21, and Haryana three, from zero a year earlier. Each death denotes a failure at many levels, most of all the inability to prevent the supply lines and offer de-addiction support at critical moments.

Similar to Punjab, the drug issue now dominates the political discourse in Tamil Nadu. In 2021, the southern state led the national tally with 250 deaths of a total of 737. It managed to bring the numbers down sharply, but the reversal points to the vulnerability. No region is safe. The fight against drugs loses sting in the absence of relentless, coordinated crackdowns against the kingpins, and not just the peddlers. With a focus on supply reduction, there is negligible policy push on demand reduction by addressing the causes of addiction and offering solutions.

Punjab has the second-highest NDPS Act crime rate at 29 cases per lakh population and the fourth-highest number of cases. Kerala tops the list in both categories. It's an unfair assessment that the governments in Punjab have ignored the drug menace. What's inescapable is that they have largely failed. Clearly, the strategies are not working.

ON THIS DAY...100 YEARS AGO

The Tribune.

THE TRIBUNE, SUNDAY, MAY 9, 1926

Mortality amongst Hindus & Muslims

THE report on the age distribution and rates of mortality deduced from the Census returns of 1921 and previous enumerations is a document of great public importance. It contains a mass of interesting statistics, and for the first time gives separate mortality figures for Hindus and Muslims. It is stated that Muslims have lower mortality than Hindus at all ages amongst both males and females in Bombay and amongst males in the United Provinces; and at ages over about 20 or 30 amongst males and females in Punjab and Madras, amongst females in the United Provinces and amongst males in Bengal. As against this, Muslims have a higher death rate than Hindus at all ages amongst females in Bengal, and at ages under about 29-30 amongst males and females in Madras and Punjab, males in Bengal and females in the United Provinces. At the younger ages, the rate of mortality is generally heavier amongst Muslims than Hindus, but this proportion is reversed in the case of the population of older age. The report, however, explains that "Islam is more of a proselytising creed than Hinduism and that consequently the relative improvement in the longevity of Muslims as age advances is probably not so pronounced as the rates indicate, but is due partly to conversion to Islam."

Female mortality is heavier than male mortality at all ages amongst Hindus and Muslims in Punjab and amongst Muslims in the United Provinces; at ages 50 or under amongst Muslims in Bengal; at ages 45 or under amongst Muslims in Bombay; at ages 40 or under amongst Hindus in Bombay.

THE GREAT GAME

JYOTI MALHOTRA

THE Punjab BJP celebrated the victory in the West Bengal elections in a five-star hotel in Chandigarh on Friday evening, barely a day after the Enforcement Directorate cracked down on three Punjabi real-estate developers in Mohali, just outside the garden city. The two incidents are separate but everyone also knows they are connected. The newfound confidence in the BJP stems from what once was an oft-repeated adage: What Bengal does today, the rest of the country does tomorrow.

And so, in the air, hangs the question, "Is Punjab next?" It's a question not just Punjab, but all the country is asking. Certainly, the gloves are off.

Let's start with the map of India that has turned mostly saffron in the last 12 years since PM Modi took power. Except for Himachal Pradesh and Punjab in the north, Kerala, Tamil Nadu, Telangana and Karnataka in the south and Jharkhand in eastern India, the rest of the country today belongs to the BJP. No need to repeat how the dominoes have fallen.

We also know the BJP likes to detail. In Bengal, the Special Intensive Revision was thrown into the "poribortion" mix of caste and gender and religion; alongside these pages, senior journalist Jayanta Ghosal writes how the BJP decided to subdue the "Jai Shri Ram" narrative it has favoured elsewhere to focus, instead, on the anti-incumbency ills associated with Mamata Banerjee. Even Bangladesh was not spared in this "no stone to be left unturned" strategy —



FORMER ALLIES: It's clear the Shiromani Akali Dal and the BJP need each other. (1)

Dinesh Trivedi, former Trinamool Congress MP who moved to the BJP five years ago, was sent to Dhaka as High Commissioner to story broken by his colleague Ujjwal Jalali — to showcase its pro-Bengal intent.

The focus on Punjab has been a long time coming. PM Modi visited Gurdwara Sachkhand Ballan in February to mark the anniversary of Sant Ravidas, revered by the Sikh Ravidassia sect, while the sect head was given a Padma Shri in January — about 22 per cent of the state's Sikhs are Dalits. Haryana CM Nayab Singh Saini's forays into Punjab in a turban are well-known.

It seems the seven defector AAP MPs who recently joined the BJP will soon set up camp in Chandigarh — their staffers are already here. Even the banquet for Vietnamese President Tu Lam in Rashtrapati Bhavan earlier this year was designed by Punjab celebrity chef Harpal Singh Sokhi (check out his interview and food stories; the menu recipes in *The Tribune*) — the menu featured *Bathinda vadai aloo*, *Dal Amritsari*, and with a nod to Haryana, *Hisar bajra khichdi*.

With speculation gaining

The BJP will attempt to fragment the Sikh vote, in the hope that it can wear some people away.

ground that elections in Punjab will be held towards the end of the year — Census operations are likely to start by middle-January 2027, which means they can't overlap with the conduct of polls — the state BJP is certainly sharpening its metaphorical knives. It hasn't escaped anybody's notice that the ED named the president of AAP Punjab, Aman Arora, as being linked with one of the realliters raided on Thursday morning. On yes, the gloves are off. The BJP is targeting the ruling AAP

CM Bhagwant Mann is hitting back at the Akali Dal — and implicitly, the BJP — by upping the ante against the 2015 sacrilege incidents that took place when the Akalis-BJP were in power. AAP will certainly fight to keep Punjab, keenly aware it is the only way it will still be taken seriously as the third pole in Indian politics. The recent passage of the Jaagat Jot Sri Guru Granth Sahib Satkar (Amendment) Act, 2026, is also intended to whittle down the incredible influence of the SGPC (and therefore the Akali Dal), which issues AAP-critical statements every day.

Winning Bengal has certainly pumped up the BJP And yet, as Delhi's Lt Governor Tarunjit Sandhu — grandson of Teja Singh Samundri, a blue-blooded reformer of the 1920s Gurdwara reform movement and a founder member of the SGPC — discovered, as the BJP candidate for the Amritsar Lok Sabha seat in mid-2024, that the powerful Sikh peasantry wasn't ready to let him into their villages, even to campaign. (He had much better luck with the Hindu communities.) That big question remains,

even if much else has changed these past two years. Are Punjab's Sikhs prepared to let the BJP in today?

Or, perhaps, that's not the right question, because it would be folly to think the Sikhs are an undifferentiated, holistic group of people. The right question, perhaps, should be: How will the different Sikh communities, or castes, vote? And will some Sikh caste communities let BJP candidates in, more than others?

Certainly the BJP will attempt to fragment the Sikh vote, in the hope that it can wear some people away. Talk of a BJP-Akali Dal alliance, before or after the poll, refuses to go away, despite Home Minister Amit Shah's announcement the BJP will fight alone. It's clear the two parties need each other — the Akalis need the Hindu vote the BJP can provide and the BJP needs the Akali vote.

The big difference between 2024, when BJP-Akali Dal talks fractured over which party would get more seats in the Lok Sabha polls, and now is that most of the country today, including big Bengal, has been coloured saffron. In this scenario, will Shah still be willing to pull second fiddle to Akali Dal's Sukhbir Badal?

Where, you might ask, is the grand old party in this political melee? The interesting thing about the Congress, which has just dumped its old partner, the DMK, in Tamil Nadu, and won back Kerala on an anti-incumbency Left vote, is that it has a good chance of retaking Punjab — if its various factions can still come together and hang together and woo the citizenry in its favour. (At the moment, though, that seems like a really tough ask.)

It may well, then, be time for Punjab to (tunelessly) hum the Satinder Sartaj two-liner: *Saanu saariyaan visarjayaan narayan re/Kahre paase jaiye aajana. All our paths seem to have disappeared/What direction should I take now?*

THOUGHT FOR THE DAY

The BJP is not dependent on a single individual, nor is it tied to the apron strings of a family. — Anil Bihari Vajpayee

A mother figure in Tehran

SUMIT PAUL

THE famous writer Amrita Pritam lost her mother, Raj Bibi, when she was just 11 years old. She once asked Sahir Ludhianvi, who was very close to his mother (Sardar Begum), what defined and epitomised a woman. Sahir told her that it was motherhood that encompassed a woman's entire being. No wonder he wrote, "Aurat ne jansam diya mardon ko, mardon ne usay bazaar diya (the woman gave birth to men, but they pushed her into the flesh trade)."

In the 1960s, a tall and elegant teacher named Aameeza Andaleeb taught English to me at a school in Tehran. Elementary English was offered as Iran had, and still has, a system of parallel options for students even at the school level. I opted for the languages — Persian, Dari (Afghan variant of Persian), Arabic and Pahlavi — right from the beginning and had to choose English rather late as my Bengali-speaking father insisted that I must learn at least a smattering of the language at school.

Ms Aameeza was also the Vice Principal. Since I looked different from Iranian students and my name sounded "un-Islamic", she asked me in English, "What is your name?" I replied after struggling to understand her question. She then asked me in Persian about my background.

When I told her in Persian that I was born in Ireland, she was flabbergasted. "Yet, you can't even understand basic English! This is strange!" I told her that my father, a medical adviser, had brought me to Iran when I was just two years old. "I will teach you English," she said. She hailed from an elite family of Iran; her Shia father was a bureaucrat, while her Sunni Muslim mother taught anthropology at the University of Tehran. Ms Aameeza did her schooling in England and the US; her family had a house in Hampshire. Her command of Persian and English was impeccable. She brought books of elementary English and started giving me tuition. Despite my beginner's awful English, she would patiently correct my jumbled-up sentences.

Though a devout Muslim, she never asked me about my religion. When she came to know that I didn't follow any religion and had no faith in God, she encouraged me to remain a good human without any man-made faith or belief in a supernatural being. She exempted me from attending classes on Quranic studies. She was herself a non-denominational and non-sectarian Muslim without a Shia/Sunni tag.

Ms Aameeza stayed in touch with me even when I was in India and England. She would come to meet me in London, where I was pursuing higher studies in Islamic theology and the Persian mysticism of Rumi and Shams. Alas, she passed away in 2016. I still remember her as a dear teacher, mentor and mother figure. There is, indeed, a mother in every woman, regardless of her age, ethnicity and creed.

The writer is a Pune-based columnist

LETTERS TO THE EDITOR

TN imbroglia worrisome

With reference to 'Hung mandate', the editorial rightly points out that in a democracy, the majority must be tested on the Assembly floor rather than through political assumptions or subjective decisions. In the case of a hung Assembly, constitutional authorities must act with neutrality and transparency. Delay or confusion in inviting a party or coalition to form the government can create instability and weaken people's faith in democratic institutions. The past SC Court judgments clearly emphasised the importance of floor tests in determining majority support. Respecting constitutional principles is essential for maintaining the strength and credibility of Indian democracy.

SIA SUVARNA, BY MAIL

Floor test the best remedy

Apropos of 'Hung mandate', the editorial rightly highlighted the importance of constitutional morality in a hung Assembly situation. In a democracy, the true test of a majority should happen on the Assembly floor and not through political assumptions or delayed decisions by constitutional authorities. The Governor's role must remain neutral and transparent. Past examples from Karnataka and Goa clearly show that unnecessary delays in conducting floor tests can encourage political instability, defections and misuse of power. A floor test is the fairest way to maintain public trust in democracy.

LUVNEET, BY MAIL

Institutions under siege

The BJP is playing a dangerous game in Tamil Nadu by trying to undermine the federal structure of the Constitution. In Tamil Nadu, the party does not want the TVK to form a government with Congress support, so it is pressuring Vijay to join hands with the AIADMK. The BJP wants to piggyback on the AIADMK to gain a foothold in the South, where it has negligible presence. Such an attempt to manipulate the electoral mandate through the office of the Governor can set a disturbing trend. The Opposition's charge that various institutions are being captured holds water.

ARUN HASTIR, GURDASPUR

Economic vigilance needed

Refer to 'Why the short-term effect of West Asia war is muted'; the article offers a perceptive analysis of how India has managed to remain economically resilient despite rising geopolitical turbulence in West Asia. Strong domestic consumption, steady policy measures and healthy growth in manufacturing and services have helped cushion the immediate impact. However, this relative stability should not breed complacency. India's dependence on imported crude oil continues to be a strategic vulnerability. This moment calls for economic prudence, diversification of energy resources and a renewed thrust on self-reliance. In a world increasingly shaped by uncertainty, diplomatic balance and long-term economic foresight will remain indispensable. India has displayed admirable resilience so far, but sustained vigilance will determine how effectively the nation navigates future global shocks.

KAMALDEEP KAUR, PATIALA

Environmental awareness

Refer to 'Coming up, bee corridors along Delhi-Katraa-way'; it is an encouraging step as it indicates heightened environmental awareness in the country. Against the backdrop of reported rampant deforestation carried out for building highways, the development comes as good news. The NHAI's endeavour will go a long way in maintaining ecological balance provided the project is sincerely executed and efficiently maintained in the long run.

JAGDISH CHANDER, JALANDHAR

Healthy political repartee

Refer to 'Flower of humour in Haryana politics'; witty conversations once made politics in Haryana more engaging and less aggressive. In today's political environment, debates often become negative, personal and full of hatred. Humour can reduce political tensions and help leaders connect with the public in a positive way. Politicians should focus more on healthy debates and public welfare rather than spreading anger and division. Leaders can disagree with each other while still maintaining respect and dignity. Democracy becomes stronger when political conversations remain civil and thoughtful.

SABAT SIDDIQUI, BAREILLY

UAE-Israel ties have deeper historical roots



VIVEK KATJU
FORMER SECRETARY, MINISTRY OF EXTERNAL AFFAIRS

RESPONSIBLE sections of the western media have reported that Israel has deployed its Iron Dome and Iron Beam anti-missile defences in the UAE during this period of intense armed hostilities, currently paused, in the Gulf. Along with the equipment, military personnel have also been sent to the Arab Gulf country. These systems have been sent, for the first time, by Israel outside its territories. Neither Israel nor the UAE have denied the reports; hence, there is no reason to doubt their veracity.

The US, under the Trump 1 administration, brokered the normalisation of UAE-Israeli ties in 2020. This was under the rubric of the Abraham Accords. Under their agreement, Israel and the UAE established diplomatic, commercial and security ties. Observers are tracing the deployment of the Iron Dome and the Iron Beam systems to the normalisation of

Israel-UAE ties. However, the reasons lie deeper in history.

The implacable enmity between Israel and Iran goes back to the beginning of the Khomeini Revolution in 1979. In the past 47 years, Iran has refused to recognise Israel's right to exist. That was a position taken by all the Arab states until Egypt recognised Israel in 1978 under Anwar-us-Sadat, the Arab states considered it a sell-out, as did Khomeini. This was different from the Shah of Iran's approach to Israel; the Shah fled Iran in January 1979. Khomeini returned to the country in February that year and soon took it in his own grip. That system has continued under the Velayat-e-Faqih framework.

The UAE's animosity towards Iran has historical roots. It arose from the traditional cultural superciliousness of Persians towards the Arab bedouin and the disdain with which the Shah treated them. This was exacerbated when he occupied the Greater and the Lesser Tunbs and Abu Musa just days before the UAE was formed in December 1971. The Tunbs were disputed between Iran and Ras al Khaimah and Abu Musa between Shaqiah and Iran. The Iranian action further embittered relations, but the extent and persistence of negativity became clear when in early 1997, the UAE's



MEDIATOR: The US brokered the normalisation of UAE-Israeli ties in 2020 with the Abraham Accords.

Minister of State for Foreign Affairs (and now Foreign Minister) Abdullah bin Zayed conveyed an astonishing position to India's then External Affairs Minister I.K. Gujral. I know this personally and it would be timely to disclose it in more detail than he has done earlier. Gujral visited Tehran and decided to spend a few hours in Abu Dhabi to meet his counterpart on his way back to Delhi. In Tehran, apart from bilateral ties, he focussed on the situation in Afghanistan, where the Taliban had captured Kabul some five months before his visit.

Both Iran and India along with Russia were assisting the anti-Taliban alliance. While an exchange of views on Palestine took place, the situation in the

It is shortsighted for India to give primacy to one Arab peninsula state, as it is doing today.

Gulf and Iran-Gulf relations were not on the agenda; there was no need for them to be so.

After the Abdullah-Gujral meeting had gone on for some time, after discussions on bilateral ties, the former asked to meet the latter alone. All officials present, including me, left the chamber. Gujral and Abdullah were together for around 20 minutes. Gujral came out and looked troubled. When some of the accompanying officials were alone with him and could talk to him in confidence, they asked what had happened.

His words are embedded in my memory. He said that Abdullah had cautioned him on Iran and then had added these words: "We can imagine

ourselves to be in the same trenches with Israel against Iran". In the context of the times, this was a bombshell.

While it was known that Sheikh Zayed, UAE President and Abu Dhabi ruler, as well as some rulers of the six other UAE sheikhdoms did not have positive feelings for Iran, the possibility of their making common cause with Israel against Iran had never been contemplated in Delhi. Little under three decades later, Israel and the UAE have made common cause against Iran and now!

The UAE has moved away in its approaches to society and diplomacy from other Arab Gulf states in recent years. A substantial degree of antipathy has emerged between Saudi Crown Prince Mohammed bin Salman (MBS) and Mohammed bin Zayed (MBZ), the current Abu Dhabi ruler. UAE senior officials have openly complained that none of the other Arab Gulf states came to their country's support when it was facing a far higher degree of missile and drone attacks by Iran since the beginning of the present conflict.

This is not far from the facts. In a kind of response, the UAE left OPEC and OPEC+. Having the sixth largest oil reserves and producing over 3 million barrels per day of oil, the UAE is a significant factor in the hydrocarbons world. It will try

to chart its own path, but OPEC+ countries will continue to dominate the oil markets. It is likely that the UAE will get more elbow room for taking independent decisions on its oil production, but it will have to align itself on other issues with OPEC+.

MBZ adopted a more liberal social policy, allowing other faiths to open their places of worship. At the same time, Dubai became one of the world's important financial centres and developed its tourism industry. In taking these steps, the UAE abandoned the exclusivist approaches of Wahhabi Islam and moved in unprecedented directions.

While MBS has also softened the rigours of Wahhabism in society, he has not, and indeed cannot, follow MBZ's example. The House of Saud is in the vanguard of Wahhabism. Will MBS and other Gulf rulers now subtly preach that MBZ has gone too far?

It is important that Indian analysts in government and outside extend their study of the Arab peninsula to its theological moorings, the tribal roots of its societies and polities and its internecine quarrels which impact the policies of its countries. The lesson from these studies will reveal that it will be shortsighted for India to give primacy to one state as it is doing today.

The politics of voter lists



AJAY K MEHRA
SENIOR FELLOW, CENTRE FOR MULTILEVEL FEDERALISM

INDIA'S electoral process, which has not only sown the seeds of participatory democracy but has also enabled democracy to flourish over the past 74 years, has in recent years witnessed attempts to modify the system to the advantage of the ruling party at the Centre.

Within two years of the electoral setback suffered in the 2024 general election by the Narendra Modi-led National Democratic Alliance (NDA), on government orders, the Election Commission of India (ECI) introduced the Special Intensive Revision (SIR).

The ECI introduced logical discrepancy as a new factor in the SIR to check the voter lists to allegedly modify them to the Central government's advantage. It altered the process of the elections.

This desperate step was taken by the BJP after its vote share dropped to 36.56 per cent and its Lok Sabha tally fell to 240 seats in the 2024 general election. The deep roots established by Mamata Banerjee's All India Trinamool Congress in West Bengal, a thorn in the flesh of the BJP had to be removed.

No mechanism of 'logical discrepancy' is mentioned in the Constitution or statutory document. It has never before been used by the ECI in any state. Logical discrepancy checks are conducted through

software rather than through physical verification by ECI staff. The software is designed to check discrepancies defined by the ECI. It refers to 'discrepancies' due to any mismatch in voter information—in the names of parents and voters, and so on. The software compares the current data with the 2002 records. The discrepancies could include parent-name mismatches, implausible age differences between voter and parent, having more than six progeny, a difference in address, etc.

Even the Supreme Court has not given any relief to the affected voters. Its innovative idea of tribunals deciding the matter could not get the affected voters' names back in the list.

Around 2.7 million voters' names have been deleted from the rolls. The mechanism is faulty because it treats clerical mistakes, spelling errors and inadvertent spacing as grounds for deleting genuine voters' names.

The SIR appeared on the electoral scene before the Bihar Legislative Assembly election in 2025. The process showed widespread deletion of voters' names

from the electoral rolls. The ECI prescribed documents for identity proof that were not easily available with the voters in rural areas. The short time available did not allow people to provide the papers. Even booth-level officers did not get sufficient time to verify all the voters before the elections. This has impacted the poll results.

The Union government put all its administrative resources in West Bengal to ensure the BJP's victory. The Union Home Minister personally directed the security operations. The ECI carried out mass transfers of West Bengal cadre officers, overriding the state government's administrative structure.

In their place, selected all-India cadre officers from BJP-ruled states were posted. Over 2.5 lakh central armed police forces personnel were deployed. The West Bengal police was not allowed to perform its duties. The counting of votes was entrusted to the imported Central government employees.

Several procedural and operational discrepancies in the SIR exercise have been pointed out by leaders of the TMC and other opposition parties. It led to the removal of names of several voters, particularly of the Muslim community.

These elections have raised questions about the integrity of the electoral process and the future of political formations. There have been allegations of selective exclusions during the SIR process, leading to a growing trust deficit between the opposition parties and the ECI, which opposition leaders accused of favouring BJP candidates in West Bengal. If the BJP's victory runs continues like this with the support of the ECI, it threatens the political and electoral processes.

West Bengal elections have raised questions about the integrity of the electoral process and the future of political formations.

How Bengal finally turned



JAYANTA GHOSAL
SENIOR JOURNALIST

I STILL remember when Atal Bihari Vajpayee told me that although he had served as Syama Prasad Mookerjee's private secretary, he regretted that the BJP had remained largely confined to the Hindi heartland. He believed that only when the party could establish itself as a truly pan-Indian force, especially in a state like West Bengal, under Left rule, would that regret fade. Years later, Vajpayee's aspiration appears to have been realised.

The BJP's early breakthroughs in Kolkata were symbolic but significant. When the party won just two wards in the Kolkata MC elections, Jyoti Basu was the CM. L.K. Advani had remarked from Delhi, "Kolkata mein BJP ka khatu khul gaya hai."

Fast forward to today, and under the leadership of Narendra Modi and Amit Shah, the BJP has turned what once seemed impossible into reality. This transformation was gradual and strategically crafted. Even in 2021, the BJP had made a major leap, increasing its vote share and jumping from just three MLAs to 77 in the Assembly. That established the party as a serious contender. The lessons from 2021 were crucial. Through a process of trial and error, the BJP altered its approach for 2026. The party did not abandon

its core ideological themes: slogans like 'Jai Shri Ram' and Hindutva remained. But it recognised that these alone would not deliver success. In 2026, the BJP shifted its central message to 'poriborton' (change).

This shift was rooted in a reading of the ground reality. After 15 years of Mamata Banerjee's rule, the BJP sensed anti-incumbency. Issues such as erosion in the education system, allegations of corruption, district-level violence, syndicate culture and extortion had created widespread dissatisfaction.

The kind of lumpen elements that had once infiltrated the Left regime seemed to have found space within the Trinamool system as well. Industrial stagnation and repeated missed opportunities further intensified public frustration.

The BJP framed its campaign not just as a leadership change but as a broader transformation of Bengal, promising to restore its lost glory as a centre of intellectual and cultural renaissance.

On the other side, Mamata Banerjee appeared to have underestimated the depth of anti-incumbency. Political histo-

ry offers a parallel here. After the Nandigram firing, when concerns were raised with former Chief Minister Buddhadeb Bhattacharjee about the potential fallout, he had reportedly dismissed the possibility of defeat. Yet, the political tide turned swiftly. A similar overconfidence appeared to have crept into sections of the TMC leadership. Internal conflicts, issues during nominations and ongoing investigations by Central agencies created an atmosphere of unease.

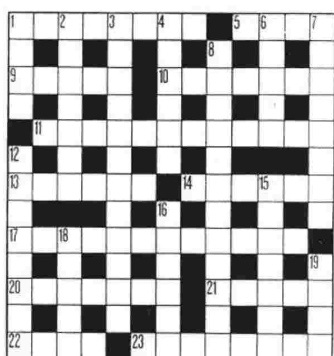
Despite this, defeating Mamata Banerjee was never going to be easy. One key factor was the Muslim vote, which constitutes roughly 30% of the electorate. The BJP had realised that unless this vote was fragmented, it would be difficult to defeat the Trinamool. The EC said the names of Bangladeshi infiltrators and bogus voters would be deleted through the SIR, which appeared to benefit the BJP.

Women, traditionally, a support base for Mamata, were another critical constituency. The BJP attempted to make inroads by highlighting issues of women's safety and leveraging Modi's outreach among female voters.

The consolidation of Hindu votes also played a decisive role. At the same time, the party tried to soften its image among Bengali bhadralok. Another major shift was in welfare politics. Earlier, the BJP had criticised Trinamool's dole-based approach. But in 2026, it matched, and in some cases exceeded, those promises. Equally important was the party's approach to Bengali identity politics. For the first time since 1977, a pan-Indian party successfully engaged with Bengal's regional identity.

For the first time since 1977, a pan-Indian party managed to meaningfully engage with Bengal's regional identity.

QUICK CROSSWORD



- ACROSS**
- Capital of Finland (8)
 - Sharp blow (4)
 - Disprove (5)
 - Compliment unduly (7)
 - Proved reliable by experience (5,3,4)
 - Subsequently (5)
 - In poor health (6)
 - Very great amount (6)
 - Most prominent position (5,2,5)
 - Conceive (7)
 - Goodbye (5)
 - Still (4)
 - Eventually (2,6)

Yesterday's Solution

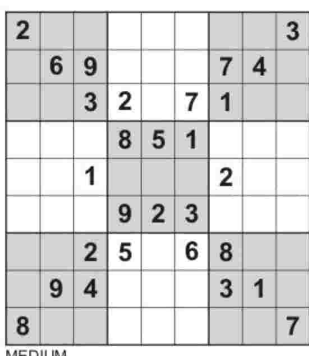
Across: 1 Hard times, 8 Quash, 9 Connive, 10 Warren, 11 Hermit, 12 Implicit, 15 Dialogue, 18 Struck, 20 Tip-off, 21 Pioneer, 22 Rogue, 23 Take shape.

Down: 2 Atone, 3 Dynamo, 4 Inviting, 5 Squall, 6 Caprice, 7 Think tank, 11 Head start, 13 Prestige, 14 Rampage, 16 Offset, 17 Crunch, 19 Creep.

DOWN

- Swift rabbit-like animal (4)
- Open-minded (7)
- Meaningful (2,3,7)
- Woman's long loose dress (5)
- Work-headed (8)
- Fastidious (4,2,6)
- Fire blue gem (8)
- Severe defeat (7)
- Bring about (6)
- Angry (5)
- Growing luxuriantly (4)

SU DO KU



MEDIUM

YESTERDAY'S SOLUTION

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

CALENDAR

MAY 9, 2026, SATURDAY

- Shaka Samvat 1946
- Vaisakh Shaka 19
- Vaisakh Purnima 26
- Hijri 1447
- Krishna Paksha Tithi 7, up to 2:03 pm
- Shukla Yoga up to 2:36 am
- Shravan Nakshatra up to 11:25 pm
- Moon in Capricorn sign

FORECAST

CITY	MAX	MIN
Chandigarh	35	21
New Delhi	36	24
Amritsar	37	22
Bathinda	39	21
Jalandhar	37	22
Ludhiana	36	21
Bhiwani	38	26
Hisar	37	22
Sirsa	41	23
Dharamsala	28	11
Manali	20	11
Shimla	22	11
Srinagar	28	13
Jammu	35	23
Kargil	22	07
Leh	19	03
Dehradun	32	19
Mussoorie	24	13

TERMINAL INC.

The Statesman

Incorporating and directly descended from
the Friends of India - founded 1818

Managed Survival

The recent vote in the British House of Commons was never just about whether Prime Minister Keir Starmer would face an inquiry. It was a test of something less visible but more consequential: the durability of authority in a governing party still defining itself in power. On paper, the outcome looks decisive. A clear majority of MPs rejected the push for an investigation into statements surrounding Peter Mandelson's diplomatic appointment. In practice, however, the episode reveals a leadership that is intact, but increasingly conditional.

Governments typically treat such parliamentary challenges as procedural irritants. This one was different. The scale of internal management required to secure the result - ministerial lobbying, senior party figures intervening, and the mobilisation of MPs who might otherwise have stayed away - suggests that party discipline cannot be taken for granted. When a leadership must expend disproportionate effort to win a vote it was always expected to win, the signal is unmistakable: authority is being negotiated, not exercised.

More telling still is the character of dissent. The number of MPs willing to break ranks was not large enough to threaten the outcome, but it was sufficient to puncture the illusion of cohesion. Their objections were not framed as routine criticism but as questions of institutional integrity - about whether the executive can mark its own homework when scrutiny becomes inconvenient. That language matters. It shifts the argument from partisan manoeuvring to constitutional principle, where reputational costs accumulate more quietly but endure longer.

The government's decision to whip the vote aggressively reflects a rational calculation on how to manage a recent political memory. Parliamentary inquiries have become unpredictable theatre, capable of reshaping narratives and careers. Avoiding that risk is defensible. Yet the method carries its own price. A leadership that leans heavily on procedural control to suppress scrutiny risks appearing defensive, even when it is substantially confident of its position. Over time, that perception can erode the informal authority that modern prime ministers rely on more than formal majorities.

There is also a deeper strategic misalignment at work. For a government elected on promises of competence and ethical clarity, recurring disputes over process and transparency are not peripheral irritants; they cut to the core of its political identity. Each re-emergence of the issue reopens a question the leadership would prefer settled: not whether rules were technically followed, but whether the spirit of accountability was upheld. This episode underscores a broader unease: political authority today depends less on numbers, more on trust that cannot be whipped.

The immediate crisis has passed. No inquiry will proceed, and legislative business will continue. But the residue of the episode lingers in less visible ways - in strained backbench relations, in a more watchful parliamentary party, and in a narrative that opponents can revive with ease. Survival, in this instance, has been carefully managed. Authority, however, has been incrementally diluted.

Hormuz Limits

President Donald Trump's abrupt decision to pause "Project Freedom" for 30 hours after launching it says less about diplomacy than about the changing nature of power in West Asia. The episode exposed a reality Washington has long resisted admitting: even the world's strongest navy cannot fully control a strategic chokepoint when the weaker adversary has mastered disruption rather than direct confrontation.

The Strait of Hormuz is not merely a narrow waterway between Iran and the Gulf monarchies. It is the central artery of the global energy economy. Nearly one-third of the world's oil and gas passes through it. Any sustained instability there immediately affects insurance markets, shipping costs, energy prices, and investor confidence across continents. That is precisely why Iran does not need to formally blockade the strait to exert pressure. Fear itself becomes a strategic weapon.

The United States entered the crisis with the assumption that naval escorts, destroyers, and overwhelming military visibility would reassure global shipping. Instead, the opposite happened. Commercial traffic reportedly continued to decline, insurers remained unconvinced, and fresh attacks and explosions kept occurring despite the American deployment. The lesson was stark. Modern maritime conflict is no longer decided solely by fleet strength. It is shaped equally by uncertainty, deniability, and economic psychology.

Iran appears to understand this transformation better than its adversaries. Tehran has spent years developing asymmetric leverage through drones, fast attack craft, regional proxies, and calibrated threats that stop short of triggering full-scale war. Its objective is not military victory against the United States. It is to make confrontation prohibitively expensive and politically unpredictable. President Trump's retreat therefore carried strategic significance beyond the immediate crisis.

The detritus of democracy

In the weeks leading up to the final vote, the landscape of West Bengal was transformed by a deluge of campaign material. From massive cutouts to the disposable plates used at rallies, the 'use-and-abandon' culture of campaigning has reached a breaking point. These materials, predominantly made of polyvinyl chloride (PVC) and non-biodegradable synthetics, do not simply disappear when the results are announced. They linger in the soil, clog the arteries of our cities, and release toxic leachates that candidates seek to represent



of Waste Management, Air and Water (SBMAW) provides a sobering quantification of this crisis. In a state like West Bengal, with 294 Assembly constituencies, the estimates are astronomical. Each constituency is thought to generate approximately 10 tonnes of banner waste and several tonnes of synthetic flags. When combined with the nearly 2,352 tonnes of single-use plastics and catering waste generated during political gatherings, the total statewide burden nears 7000 tonnes.

This is not merely a localized nuisance; it is a massive, concentrated injection of non-recyclable waste into an already strained municipal system. Despite the implementation of the Solid Waste Management (SWM) Rules of 2026, which mandate stricter handling by bulk generators, the chaotic transition from campaigning to governing often leaves these regulations in the dust.

The public health implications of this negligence are severe. As the monsoon season approaches, the discarded plastic and flex boards become primary culprits in urban flooding, a recurring nightmare for the residents of Kolkata and its surrounding districts. When drainage outlets are blocked by synthetic debris, the resulting waterlogging becomes a breeding ground for vector-borne diseases.

Furthermore, the desperation to clear these 'mountainous' piles often leads to the worst possible outcome: open burning. When PVC and treated fabrics are incinerated, they release dioxins and furans, highly carcinogenic pollutants into the atmosphere, exacerbating the respiratory crisis in an already polluted region. The Hooghly River, the lifeblood of the state, eventually receives the runoff, carrying microplastics downstream and devastating aquatic ecosystems that thousands of people depend on for their livelihoods.

This crisis is a reflection of a deeper

malaise within the world's largest democracy: the normalization of environmental destruction as a cost of doing business. While elections are the cornerstone of the republic, they cannot continue to function as an exemption from ecological responsibility. The current model of aggressive outdoor advertising is an unsustainable relic of the past, particularly in an era defined by climate volatility and resource scarcity. The financial burden of this cleanup falls squarely on the shoulders of local bodies, diverting precious tax revenue and manpower from essential civic services like healthcare and education to deal with the avoidable mess left behind by wealthy political machineries.

Addressing this requires a fundamental shift in how we perceive the 'greenness' of our democratic institutions. The Election Commission of India (ECI) must evolve from a body that merely monitors speeches and addresses this requires a fundamental shift in how we perceive the 'greenness' of our democratic institutions. The ECI has the authority to mandate that all banners be made of cotton or compostable materials and that single-use plastic be banned from political rallies. Penalties for non-compliance should be significant enough to deter even the most well-funded parties.

Political parties themselves must internalize this responsibility. In an age of digital transformation, the reliance on physical, non-biodegradable clutter is increasingly redundant. A transition to digital campaigning, reusable signage, and centralized waste collection

units would demonstrate a genuine commitment to handle the waste that is inevitable. We must move toward an integrated strategy where election materials are viewed as a resource rather than a liability. Successful waste-to-energy models seen in cities like Visakhapatnam provide a roadmap. By establishing a consortium of stakeholders including NGOs, recycling firms, and municipal authorities, poll materials can be segregated at the source. Recyclables can be fed back into the economy, while the remaining non-recyclable components can be converted into refuse-derived fuel (RDF) to generate energy. This circular approach would significantly reduce the landfill burden and turn a post-poll crisis into an opportunity for innovation.

Ultimately, the sight of tattered flags and plastic plates rotting in our gutters is a test of our collective commitment to sustainability. We cannot claim to be a rising global power while allowing our most sacred democratic process to leave behind a toxic legacy. As India pushes toward its net-zero goals, the electoral cycle must be brought into alignment with these national aspirations.

The time for half-hearted appeals to 'green' elections is over. We need scalable, enforceable solutions that hold every candidate and party accountable for the debris they leave behind. Only when we ensure that our democracy is as clean as the ballots we cast can we truly say that we are building a future worth voting for. If we fail to act now, the next election will simply add another layer to the mounting waste, burying the promise of a cleaner, greener India under a mountain of plastic.



BHASKAR NATH BISWAL
The writer is a former college Principal and Founder of Supporting Shoulders

The democratic exercise in India is often depicted as a vibrant spectacle of participation that defines the nation's spirit. Yet, as the curtains fall on the recent Assembly elections in West Bengal, the visual reality on the ground tells a much darker story. The fervor of the campaign trail has left behind a staggering environmental hangover: streets choked with torn PVC banners, parks littered with synthetic party flags and drainage systems clogging under the weight of single-use plastics. What should be a moment of civic pride has once again devolved into an ecological disaster, exposing a systemic failure to reconcile our political progress with the urgent demands of environmental sustainability.

The sheer volume of waste generated during these polls is difficult to ignore. In the weeks leading up to the final vote, the landscape of West Bengal was transformed by a deluge of campaign material. Every electric pole, flyover, and village square became a canvas for political messaging. The visibility was unprecedented, so also the footprint. From massive cutouts to the disposable plates used at rallies, the 'use-and-abandon' culture of Indian campaigning has reached a breaking point. These materials, predominantly made of polyvinyl chloride (PVC) and non-biodegradable synthetics, do not simply disappear when the results are announced. They linger in the soil, clog the arteries of our cities, and release toxic leachates that poison the very land the candidates seek to represent.

Research from the International Society

THE KATHMANDU POST

Choreography of chaos, mediocrity of middle class

It is entirely possible that when peaceful protesters turned violent, breached the police barricade, and began to storm the Parliament building on September 8, 2025, a few security personnel on guard panicked.

The subsequent indiscriminate firing, resulting in the tragic death of 19 youngsters, may well have been the opening act of a Charterhouse Revolt that was spontaneous rather than premeditated. However, the loot, arson, lynching and mayhem on the following day were far too well-coordinated and clinically executed to be dismissed as a mere paroxysm of public rage. Almost five dozen people, including at least three police officers, were killed, some burnt alive.

The primary seats of the executive, the legislature and the judiciary were torched with a professional precision that suggested tactical training rather than organic anger. Total anarchy reigned on the streets on September 9, while the Nepal Army

watched with studied indifference and the firefighting vehicles of the Kathmandu Metropolitan City remained confined to their shelters.

Across the country, jails were breached and hardened criminals escaped. Weapons were looted from police posts. Commercial hubs and industrial outlets were engulfed in flames, and arsonists set fire to hotels with guests and staff still trapped inside. Calls for help to the police headquarters were met with the terse, terseness: "We are helpless. Our personnel have been instructed to protect weaponry, if possible, but to flee for their lives if necessary."

Then, the pattern began to emerge. The Nepal Army started to call the shots, insisting that the prime minister resign before he could be helicoptered to safety. On the commanding advice of the mayor of the capital city, agitators bypassed the

President to hold talks directly with the army. Based on the whims of a Discord chatroom poll, an extra-constitutional prime minister was appointed. She promptly had the Pratinidhi Sabha dissolved to ensure a free hand in governance.

No regime change is complete without the cosmetic veneer of an election. In Pakistan, the anachronistic 'doctrine of necessity' is periodically resurrected to provide post-facto legitimacy and elections are held to provide a political face for the Deep State.

Recently, even Burma conducted elections. In the pedestrian world of logic, once is chance and twice is coincidence. By the third iteration, the observer identifies a pattern. But in the choreographed chaos of elected authoritarianism, a fourth occurrence suggests something far more sinister: A premeditated method carefully masked as madness.

In political terms, 'state capture' describes

a condition where powerful groups acquire such overbearing influence that they reshape laws, policies and appointments for their partisan benefit.

In that sense, 'legitimate state capture' is an oxymoron. Yet there are ways to circumvent established traditions, and the ethnonationalist chieftain of Khas-Arya, Khadga Prasad Sharma Oli, perfected the method that ultimately precipitated his downfall.

Sharma Oli demonstrated that a captured state may still maintain the facade of elections, independence of courts and authority of regulatory agencies. These institutions can be manipulated through dexterous coalition-building, adroit co-optation of critics, division of spoils and mobilisation of an aggressive propaganda machinery. However, as the adage goes, power corrupts, absolute power corrupts absolutely and extreme power ultimately corrodes the character of the captor.

Letters To The Editor | ✉ editor@thestatesman.com

Turncoats

Sir, The BJP leaders from West Bengal claim the party will not admit TMC cutouts or opportunists. However, a closer look at the prevailing ground realities in West Bengal suggests that the situation is far more nuanced than such assertions might indicate. Across a majority of Assembly constituencies in the state, the Bharatiya Janata Party's booth-level organisation remains relatively weak and, in many areas, still in a formative stage. While the party may have achieved significant electoral success, it would be inaccurate to attribute this outcome solely to its organisational strength at the grassroots level. The recent electoral verdict appears to reflect a broader, spontaneous, and fearless expression of the electorate's desire for change, shaped by a range of socio-political factors.

Efforts to rapidly expand organisational reach must be undertaken with caution. The risk of opportunistic infiltration, driven by shifting political loyalties, cannot be overlooked. While initial statements from party leaders indicate an awareness of this concern, the real test will lie in translating such caution into effective mechanisms at the grassroots level to preserve organisational integrity and discipline. Ultimately, the coming months will reveal whether the BJP can successfully transform its electoral gains into a stable and credible grassroots presence across West Bengal.

Yours, etc., Manas Mukhopadhyay, Chinsurah, 7 May.

Landslide

Sir, The results of the assembly poll in West Bengal have scripted a landslide victory for the B.J.P. The poll debacle for T.M.C is not only unprecedented but a tectonic shift in the political priorities of the state. When the overnight an arrangement of T.M.C leaders led this catastrophic electoral outcome. The pervasive unemployment, unleashed atrocities, accompanied by cut money and threat culture, deeply resonates

with the unheard outcry of the Bengalis. The number of seats won by the BJP clearly signals an emphasis on identity-driven polarisation rather than welfare schemes. The people of Bengal will witness the 'double engine' government after nearly five decades. The drastic change underscores the collective aspirations of people. The fifteen years of misrule have ended with an incumbent chief minister refusing to submit resignation which also justifies the requirement for the transition. The upcoming years will tell how BJP reshapes the trajectory of the political and socio-economic landscape and its intent to rule Bengal.

Yours, etc., Dr. Kushal Bose, Kolkata, 7 May.

Assam

Sir, This refers to the editorial 'Sarma Model' (May 8). The Assam verdict raises questions that go beyond electoral arithmetic. What Mr Sarma has achieved is genuinely

significant - absorbing indigenous anxieties into a national ideological framework without making it feel externally imposed. That is not easy politics.

But the editorial is right to flag what gets normalised in this process. When communal polarisation becomes structurally embedded in mainstream strategy, the costs are borne quietly by minority communities whose political representation steadily shrinks. The opposition's failure was partly strategic - fighting administrative arguments against a civilisational campaign - but also imaginative. There is no reason why regional identity politics cannot be reclaimed on more inclusive terms. Other northeastern states have managed it.

The real concern is replicability. If this model travels, Indian federalism will increasingly see ethnicity and religion fused into a single electoral logic, which makes course correction considerably harder over time.

Yours, etc., S.M. Jeeva, Chennai, 7 May.



SATURDAY INTERVIEW

'India worst hit by conflict'

The reverberations of the West Asia conflict are reshaping the global economy at a structural level, exposing vulnerabilities in energy security, supply chains, fiscal stability, and geopolitical finance.

For decades, globalization assumed geography could be neutralised through finance, naval power, and insurance. Today, chokepoints like the Strait of Hormuz and the Red Sea are reasserting themselves as key economic variables, affecting industrial inputs, consumer prices, and investment flows.

The global economy now faces a new reality: shocks are no longer transient but structural and multi-layered. In an exclusive interview with Arti Bali, Dr. John Sfakianakis, Chief Economist of the Gulf Research Center in Riyadh, and Fellow at Chatham House in London, explains how this conflict is accelerating a shift toward a fragmented, resilience-driven global economic order.

Q: How is the West Asia conflict reshaping the global economy beyond oil prices and shipping disruptions? What deeper shifts are being overlooked?

A: The deepest shift is not simply higher oil prices; it is the return of geography as a binding economic variable. For three decades, the global economy was built on the assumption that finance, insurance, and naval power could cheaply neutralize geography.

Disruptions now extend beyond crude to fertilizers, petrochemicals, and refined fuels. The shock is migrating from "energy markets" into industrial inputs, food costs, freight, insurance, benchmark integrity, and balance-sheet risk.

Western commentary remains too fixated on Brent headlines; the more consequential story is that the

old model of lean inventories, just-in-time shipping, and underpriced geopolitical insurance is being repriced in real time.

Q: OPEC+ is balancing output management with geopolitical pressures. At what point do the Gulf states have to choose between economics and politics, and how long can that tightrope hold?

A: They do not face a clean binary between economics and politics; they face a hierarchy of constraints. In normal times, Gulf producers can calibrate volumes, prices, and diplomacy. In war conditions, physical logistics dominate cartel strategy.

This balance can hold only so long as escalation remains below the threshold of sustained strikes on bypass infrastructure - Yanbu, the East-West pipeline, Fujairah, or major desalination-power complexes. Once those assets are persistently threatened, the political imperative of regime and infrastructure security overrides production economics.

India's deep energy ties and Gulf remittances make it vulnerable to prolonged West Asia conflict, while China and ASEAN are better positioned to absorb sustained energy, fiscal, and supply chain shocks due to stronger buffers and diversified linkages.

India is vulnerable, but not helpless. On crude, the Indian government puts daily consumption at about 5.5 million barrels. Imports now come from around 40 countries, and about 70 per cent of crude imports are currently sourced from routes outside Hormuz.

India is most exposed as energy inflation quickly feeds into prices, budgets, and households. China is more buffered in the short term due to domestic production, pipeline imports, and scale, though it still faces



The real vulnerability is not crude alone; it is LPG and household inflation. Around 60 per cent of India's LPG consumption is imported, and roughly 90 per cent of those imports come from the Middle East.

On remittances, the vulnerability is meaningful but less absolute than a decade ago. RBI-linked reporting indicates India received about USD 118.7 billion in remittances in FY2023/24, with the Gulf Cooperation Council (GCC) share down to about 38 per cent, even though the UAE alone still accounts for roughly 19.2 per cent.

On the fiscal side, the strain is already visible: The excise cuts on petrol and diesel cost roughly Rs 70 billion per fortnight gross, with a net hit of about Rs 55 billion after offsetting export taxes.

Q: Why is India more vulnerable to a prolonged West Asia conflict than China and ASEAN?

A: Asia absorbs the shock unevenly. India is most exposed as energy inflation quickly feeds into prices, budgets, and households.

China is more buffered in the short term due to domestic production, pipeline imports, and scale, though it still faces

price shocks. Japan is highly exposed and is already using reserves and adjusting its energy policy.

ASEAN is the quiet stress point due to weaker buffers and high import dependence. The first-hit sectors are aviation, chemicals, fertilizers, refining, shipping, and fuel-sensitive consumer markets.

Q: How are Egypt, Jordan, and Lebanon faring under prolonged conflict, and is the international safety net sufficient?

A: This is a layered supply shock, not just an oil-price spike. Kharg dominates Iran's exports, so disruption there could sharply cut output.

Q: Does prolonged regional conflict accelerate or fundamentally threaten Saudi Arabia's Vision 2030 diversification away from oil?

A: Both, but on different time horizons. In the short term, higher oil prices provide Saudi Arabia with revenue, cash flow, and fiscal space.

Iran's pressure strategy increasingly

targets sectors central to the Gulf's diversification push. The risk to Vision 2030 is not immediate collapse, but a scenario where Saudi Arabia gains hydrocarbon wealth while diversification becomes costlier, more securitised, and less efficient.

Q: Central banks fought post-Covid inflation for years. How much of that progress is now at risk from this conflict, and have the Federal Reserve (Fed) or European Central Bank (ECB) modeled West Asian downside risks?

A: Inflation progress is not reversed but is exposed to second-round risks. The ECB has explicitly modeled adverse scenarios: inflation could be almost three percentage points higher in 2027, with weaker growth through 2026-27 if the shock persists.

The key limitation in Western central banking is not technical modeling of shocks, but underestimating their persistence and geopolitical nature.

Q: Is the global economic order resilient enough to absorb what is unfolding in West Asia, or are we at an inflection point?

A: The system can absorb a short conflict, but not prolonged, repeated chokepoint disruptions without structural change. BIS (Bank for International Settlements) and IMF (International Monetary Fund) analyses show rising volatility, tighter financial conditions, and weaker growth from the shock.

The order is not collapsing, but evolving toward redundancy, diversification, and greater state intervention. The shift is less about rupture and more about a change in the nature of globalization - from efficiency-driven to resilience-driven.

From efficiency-driven to resilience-driven.

100 Years Ago



Front page of The Statesman dated 09 May 1926

OCCASIONAL NOTE

STRIKE news comes in abundantly, but the general impression it leaves is that matters are much as they were except that the first surprise being over authority is improving its grip of the situation. There is more said about street rioting, but that presumably is because street incidents are news for the cables, whereas the quiet behaviour of the bulk of the nation is regarded as a matter of course.

News Items

ALL-NIGHT RIOT MINERS STORM GLASGOW TRAM DEPOT

(FROM OUR SPECIAL REPRESENTATIVE) LONDON, MAY. As the sequel to a prolonged disturbance in the East-end of Glasgow, which lasted all night long, 89 persons were arrested and were remanded by the police, says the Times' special correspondent.

The trouble was precipitated by the arrival of five hundred miners from Newton and Cambuslang to assist pickets at the Ruby Street tramway depot, where it was rumored, University student volunteers were billeted. They announced their intention of storming the depot and attacked the police guard but were dispersed after repeated baton charges.

Later they reassembled and repeatedly attacked the depot, but were continually defeated. The mob then looted public-houses and boot-shops, smashed many windows, and again attacked the depot. The police were strongly reinforced and the rioters were dispersed.

There was sporadic fighting all through the night, resulting in large numbers of prisoners being conveyed to goal. Miners in the surrounding districts declare their intention of assisting the disorderly elements to-night, and further trouble is feared. The fullest precautions are being taken today.

The miners went to the University and challenged the students to a free fight, but the police dispersed the strikers. They stoned buses but 190 volunteer-driven trams, twice as many as yesterday, were running under police protection.

Volunteers are unloading foodstuffs at the docks.

GERMAN AIRCRAFT INTERNATIONAL AGREEMENT CONCLUDED

NEGOTIATIONS which have taken place for several months between representatives of the Conference of Ambassadors and the German Government regarding German aircraft has resulted in an agreement to-day. It takes the form of an exchange of notes with annexes between the Am-bassadors in Paris. The text of the various documents has been intimated and will be signed when approved by the Governments concerned.

BJP government must realise Tagore's vision



THE swearing-in of West Bengal's first BJP government on

TUHINA SINHA Rabindra Jayanti is not merely symbolic politics. It is a civilisational correction.

For far too long, Bengal - the cradle of India's intellectual and spiritual renaissance - was governed by regimes that seemed deeply disconnected from the very ethos that once made the state a cultural torch bearer.

The signing of a BJP government taking oath on the birth anniversary of Rabindranath Tagore lies precisely in this Bengal is attempting to rediscover its soul. Bengal is the land of Ishwar Chandra Vidyasagar, who challenged social evils through enlightened reforms. It is the land of Ramakrishna Paramahansa and Swami Vivekananda, who infused India with spiritual confidence and national awakening.

Yet under Mamata Banerjee, Bengal increasingly resembled a state inspired less by its sages and reformers and more by the politics of Huseyni Shaheed Suhrawardy - where intimidation, communal appeasement and suppression of political opponents became normalised instruments of governance.

The post-poll violence of 2021 remains one of independent India's darkest democratic stains. BJP workers were hunted, homes torched, women assaulted and entire villages terrorised because citizens dared to vote against the ruling party. Bengal ceased to be a democracy governed by law and increasingly became a territory controlled through fear.

The TMC ecosystem did not merely tolerate criminality, it politically weaponised it.

Nothing exposed this degeneration more brutally than Sheikh Shahjahan and the horrors of Sandeshkhall. The allegations of systematic intimidation and exploitation emerging from Sandeshkhall shook the nation. Yet for months, the ruling establishment appeared more invested in protecting political interests than ensuring justice for vulnerable women.

Similarly, the tragedy surrounding RC Kar Medical College and Hospital became not merely a law-and-order failure but a moral indictment of the state government. The courage and dignity displayed by Ratna Deb Nath stood in stark contrast to the evasiveness and political defensiveness of the ruling dispensation. While grieving parents sought justice, the state machinery appeared preoccupied with damage control. This is the essential difference in political character that

benefited from Bengal's intellectual capital while Bengal itself stagnated under political misrule. A civilisation that once produced India's sharpest thinkers became synonymous with industrial decline, collapsing institutions and shrinking aspiration.

The new BJP government inherits an enormous responsibility: to reverse this historic decline and script Bengal's cultural, economic and administrative renaissance simultaneously.

Its challenge is not merely to improve governance indicators, but to fundamentally alter Bengal's direction. To rebuild investor confidence. To depoliticise institutions. To dismantle syndicate culture. To restore rule of law. To create industries and opportunities that allow Bengal's youth to dream within Bengal again instead of fleeing it.

PM Narendra Modi and HM Amit Shah understand something that India's pseudo-secular establishment never did: economic resurgence without cultural confidence is incomplete. Bengal's renaissance historically emerged from the fusion of intellectual brilliance, spiritual rootedness and national purpose. The state must rediscover that synthesis.

That is why the symbolism of taking oath on Rabindra Jayanti matters profoundly. It marks the beginning of an attempt to move Bengal away from

Bengal voters have now recognised. The BJP's politics in Bengal is fundamentally anchored in restoring dignity to ordinary citizens, ensuring equal protection under law and reconnecting governance with civilisational values.

The ideological battle in Bengal was never simply electoral. It was moral and cultural.

Under the TMC government, corruption became an inextricable institutional culture. Coal scam money allegedly financed sophisticated propaganda operations and political consultancy exercises. "Cut money" became a parallel extortion economy imposed upon the poor. Violence became a recognised electoral management tool.

Illegal migration was cynically weaponised to alter voting patterns and sustain vote-bank politics. Governance was reduced to patronage, intimidation and perception management.

The consequences were devastating not merely politically, but economically and psychologically.

Perhaps the greatest tragedy of modern Bengal has been the outward migration of its brightest minds. For decades, talented Bengali youth - engineers, doctors, entrepreneurs, academics and professionals - were forced to leave their homeland in search of dignity, opportunities, and economic mobility elsewhere. Bengaluru, Pune, Hyderabad, Delhi and Mumbai

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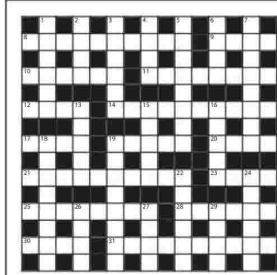
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Crossword | No. 293456



YESTERDAY'S SOLUTION

ACROSS: 8 Party swapped permanently; 9 Mount, in turn, but a little awkwardly; 10 Let out to catch (up); 11 Flipping idiot! Mark U player's one-handed marks on body (8); 12 One's book a little bit of poetry (4); 14 They hate spending money around - this grates (5-5); 17 Old hony creature rolling round (4); 19 Michael gutted to stop doing jobs round the house? Clearly not (5); 20 Start to dredge (up) - you may have to work at it (4); 21 Dross! Oscar unlikely for one-handed marks on body (8); 23 Soldiers going round at speed (4); 25 Accompanied ear ordered guards around (8); 28 Dross's daughter dressed in red cuddling sweetheart (6); 30 Confuse extremists in Delaware (4); 31 Fair happening nearby - he's outside with doggies at first (4-6); 3 No change in Washington - rarely partly (6); 4 Colours ultimately faded of course (4); 5 Ian still occasionally appearing in dock, curiously (8); 6 Runs into old PM around Teeside town (4); 7 Stoke are playing - the epitome of Ian still (5,5); 8 Visibly assaults in Chelsea store? (5); 9 School getting parent's letter (5); 10 Attacker not a motorcyclist? (5); 18 Tots are busy with a balloon, perhaps (8); 19 Party rubbish? He gets a woman (4); 22 Mess in dish - language! (6); 24 What can I learn in Bangkok? Say, that's capital (6); 26 Have to defend English poet (4); 27 Attracted Prince - one extrajudicial? (4); 28 Tough outside but somewhat easier indoors (4).

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

INTERNATIONAL EDITORIALS



قصة المرأة ان الجاهل شخصاً بكونه وبهاك كثر اوج ذك حين ذك العكس
هذا كتاب بل بغيره ان الشخص ان يكونه حياً فانه على تحويه تامل حين
الكتاب بل بغيره

YOUR DAILY ARABIC PROVERB

The greatest joy comes from sitting with someone who hates and slanders you in your absence but shows you the opposite. This is enough to prove that your presence is strong enough to make him a cowardly hypocrite.

Dr. Ghazi Al-Gosailbi
(Saudi politician, poet and novelist)

Opinion

Palestinian silence should not be mistaken for acquiescence

DAOUD KUTTAB



Daoud Kuttab is an award-winning Palestinian journalist and former Fatah Professor of Journalism at Princeton University. He is the author of "State of Palestine Now: Practical and Logical Arguments for the Best Way to Bring Peace to the Middle East." X: @daoudkuttab

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A eerie feeling overcame me this week as I walked through the streets of the Old City of Jerusalem. Shops were open and a scant few locals and even fewer tourists walked by, rarely buying anything. But the body language and the faces were dark, as if most of the merchants were experiencing a strange extraterrestrial problem. The situation in the nearby governorates of Bethlehem and Ramallah was no less reassuring.

The question on everyone's lips was "when will the US-Israeli war erupt again?" While Palestinians appeared resigned to accept whatever happens, some had taken things a step further and begun hoarding products in fear that there would soon be shortages.

The Iranian war notwithstanding, Palestinians are still concerned about the marked increase in settler violence in most parts of the West Bank, as well as the Old City of Jerusalem in particular. Fears in Jerusalem

were exacerbated by the publication of a video of a French nun being cowardly pushed by a Jewish Israeli man, who then kicked her while she was on the ground.

The combination of unchecked settler violence and anti-Christian attacks have caused many, including a former Israeli senior intelligence officer, to predict that another angry explosion may be in the making. Former Mossad chief Tamir Pardo said he felt "ashamed to be a Jew" after touring Palestinian communities in the West Bank that have come under repeated attack from Israeli settlers, warning that current Israeli policy there is "planting the seeds for the next Oct. 7." He added: "It will happen in a different way, and it could be much more painful, because the West Bank is more complicated."

While the daily attacks against Palestinians in the West Bank continue without accountability, the Israeli army has not ended its own expansionism and attacks on Palestinians in Gaza, despite a ceasefire that appears to be only being

adhered to by the Palestinian resistance. The 50 percent-plus of the Strip that Israel had cut out from the east of Gaza to create an artificial (and rather ineffective) buffer zone has now been expanded.

Negotiators acting on behalf of the US-led Board of Peace have been trying without success to find a formula amid the exaggerated Israeli demand that Hamas give up all its weapons in return for Israel "considering" withdrawing from some of the land in Gaza. Reports suggest that the talks carried out by the US envoy with Hamas have the latter insisting that it will only discuss a gradual decommissioning when Israel fulfills its obligations under phase one of the peace plan, which have yet to be carried out — most importantly, its withdrawal from the area up to the "yellow line." Instead, the Israeli army, without any justification, has further expanded into Gaza with a new frontier named the "orange line" that reportedly covers more than 60 percent of the already-crowded Strip. Overlooked amid all this violence and

hopelessness is the Ramallah-based government, which last month completed a rather acceptable round of municipal elections that included the Deir Al-Balah elections in Gaza. Palestinian officials in Ramallah feel upbeat about the trajectory of their reforms, even though no one is paying attention and Israeli-inspired reports in the US State Department appear to be scraping the bottom of the barrel in a bid to find mistakes and holes in the reform effort.

Palestine and the Palestinians are going through an extremely difficult and miserable time. But their quietness should not be mistaken for acquiescence. Despite the depressing picture, there are obvious signs of steadfastness. Activists, civil society and a horde of smart and energetic young people are trying to find their way through this maze. And if no explosion occurs, they might be able to show the world the type of resilience and courage that will restore pride and lift people out of their current desperation.

The combination of settler violence and anti-Christian attacks have caused many to predict another angry explosion

COURTESY: AMALYO RAMAKSHANDU AL-JAWHAT



The north remained de facto dislocated from the central power, allowing nonstate actors to expand and take control

Everybody loses in Mali stalemate

KHALED ABOU ZAHR



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For full version, log on to www.arabnews.com/opinion

There was a show on French television on Sunday, in which children competed, singing the songs of a well-known artist who was present. At the end of the show, regardless of anything, the French presenter deliberated on the winner before screaming, "everybody won." Today, in Mali, where the Russians, French and others compete for influence, we can say "everybody lost."

The coordinated offensive launched last month by Tuareg separatists from the Azawad Liberation Front, known as the FLA, and the Islamist extremist Jama'at Nusrat Al-Islam wal-Muslimin struck several military positions in Mali, capturing Kidal. It was a major escalation of the conflict in the country's north. More importantly, it was a clear sign that the country is drifting into chaos and risks becoming a

dangerous no man's land once again.

Historically, France has played a central military role in Mali and the wider Sahel. In 2013, under President Francois Hollande, France launched Operation Serval to stop the advance of extremist groups linked to Al-Qaeda toward Bamako. This swift intervention was successful.

In 2014, France's military action shifted into Operation Barkhane, which was a prolonged regional engagement. France stationed several thousand troops across the Sahel to continue fighting nonstate actors that reflected transnational insurgencies. Yet, in 2022, despite tactical successes, the French forces were expelled.

The breakdown in relations between France and Mali accelerated following the 2020 and 2021 coups led by the current president, Assimi Goita.

For Western powers, there is a common theme in Africa and perhaps beyond. They

usually fail when it comes to achieving a lasting improvement in security or supporting the state-building efforts that are necessary. This is true of France's decade-long intervention in Mali before the push. The state was weak and corrupt and little was done to stabilize the situation. The north remained de facto dislocated from the central power, allowing nonstate actors to expand and take control.

This situation was exploited by Russia, which was also looking to deepen its influence in Africa. Moscow's first real direct involvement took place following the 2021 coup. Goita looked toward Russia and, more specifically, the Wagner Group for support with his internal security operations and, hence, to secure his hold on power.

The French withdrawal at the end of Operation Barkhane made Wagner the main security and military partner of the new leader in Bamako. However, the

start of the war in Ukraine and Moscow's greater focus on this arena changed everything. The 2023 mutiny by the Wagner Group, which was followed by the death of its head Yevgeny Prigozhin, destabilized its support capacities.

The Russian state quickly took over all the Wagner Group's overseas operations and shifted them to the Africa Corps, giving them a more institutional and formal structure. Nevertheless, it is clear now that Moscow, just like France before it, has not been able to fully consolidate its influence following the French and Western withdrawal.

While the population continues to suffer, the risks of state collapse and de facto partition are becoming increasingly prominent, with the spillover risks to neighboring countries also rising. The situation has become a fragmented stalemate in which everyone is losing.

Opinion

A concert for Hormuz

SARAH BENASHOOR



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The Strait of Hormuz, at its narrowest point, spans barely 39 km — a slender ribbon of water that has long carried one-fifth of the world's seaborne oil, the lifeblood of global commerce and energy security. Today, that vital artery lies mined, contested and partially closed. Merchant vessels face attacks, illegal tolls and the persistent shadow of naval confrontation.

In response, a carefully calibrated Chapter VII draft resolution — advanced by Bahrain on behalf of the Gulf Cooperation Council states together with the US — now awaits the UN Security Council's consideration. This is not a sweeping indictment but a focused operational text designed to restore safe navigation without unnecessary escalation. Yet it confronts the same obstacle that doomed its predecessor last month: the near-certainty of vetoes by Russia and China.

Both powers have already objected, labeling the approach "biased" and faulting it for neglecting "root causes." Their position is understandable in the cold logic of great power competition — yet it leaves the council unable to fulfill its most basic duty. Russia values Iran as a proxy that diverts American focus and resources; China secures discounted oil

while safeguarding precedents that might later constrain its own maritime interests. A resolution that offers them no stake simply invites the veto as an inexpensive tool of obstruction.

The UNSC stands at a familiar crossroads. History teaches that deadlock is not inevitable when diplomacy is conducted with realism and foresight. In 1815, at the Congress of Vienna, the great powers faced a continent shattered by two decades of war. Rather than punish or isolate defeated France, Prince Metternich and his counterparts deliberately drew the French back into the fold.

They constructed a European concert — a web of congresses, alliances and shared understandings — that wove rival ambitions into a balanced system. Every capital, including the defeated power, was given a tangible stake in the new order.

The result was nearly a century of relative stability in which no single state could upend the whole without harming its own interests.

The Strait of Hormuz now calls for its own modest concert — not concessions that reward disruption but refined language and mechanisms that align Russian and Chinese interests with the imperative of open seas.

The refinements required are modest yet consequential. First, the preamble should present the full chronology with balance;

the strikes that precipitated the crisis, the subsequent closure of the strait, and Iran's mining and tolling actions. A single paragraph deploring "all threats to navigation from any party," while stressing the need for comprehensive de-escalation, alters no operative demand. It provides Russia and China the diplomatic cover they seek, echoing successful compromises in earlier council texts on maritime security.

Second, the existing reference to the Pakistan-mediated ceasefire should not be a mere footnote. It ought to be strengthened into a clear operative call for its extension and evolution into a broader political settlement — one that revives the spirit of inclusive Gulf security arrangements long championed by Moscow and Beijing. By granting them visible co-ownership of the diplomatic horizon, the resolution transforms them from critics into potential defenders of its success.

Third, institutionalize shared responsibility. The text should mandate the secretary-general to establish, within 30 days, an international contact group for mine clearance and humanitarian corridor oversight, explicitly including the permanent members on equal footing. Operational involvement creates skin in the game that abstract veto power cannot match.

Chapter VII's binding character must be preserved — the Gulf states cannot accept

empty assurances while commerce remains throttled. A review clause, tying further measures to the secretary-general's findings and diplomatic progress, offers Moscow and Beijing a responsible off-ramp.

As UNSC president for April, Bahrain has been well placed to facilitate these adjustments. The alternative — another veto followed by uncoordinated defensive measures outside the council — may preserve legal clarity but would erode the UN's relevance, an outcome that even veto-wielding members claim to regret.

The Strait of Hormuz is more than a geographic chokepoint, it is a mirror reflecting the emerging multipolar order. In its narrow waters, the world confronts a choice: allow great power rivalry to paralyze collective action or craft a concert of shared stakes that lifts mines, opens corridors and restores the free flow of commerce.

By weaving Russia and China into the architecture of diplomacy rather than exclusion — just as Vienna's solution once did — this resolution can transcend the immediate crisis and offer a precedent for cooperation amid competition. In that achievement lies not only safer Gulf waters but a quiet affirmation that, even in an age of rivalry, diplomacy grounded in mutual interest remains the sharpest instrument of statesmanship.

History teaches that deadlock is not inevitable when diplomacy is conducted with realism and foresight

Hormuz is more than a geographic chokepoint, it is a mirror reflecting the emerging multipolar order

Has the time come for guaranteed incomes?

DR. MAJID RAFIZADEH



Dr. Majid Rafizadeh is a Harvard-educated Iranian-American political scientist. X: @Dr_Rafizadeh

Among the critical debates that the recent acceleration in technological advances, particularly in artificial intelligence, has reshaped are those concerning economic distribution and the future of our social welfare systems. Since technology is increasingly automating many tasks, the question inevitably arises: what will happen to labor and income generation?

This is why two concepts have gained importance: universal basic income and universal high income. Some influential people, such as Elon Musk, argue that we need guaranteed income programs due to the productivity gains driven by AI and to maintain social and economic stability.

While these two concepts may appear similar, they have some differences. One of the major differences is that universal basic income involves providing a minimum amount of funding to all individuals, regardless of their employment status or income level. The goal is to reduce poverty and inequality.

On the other hand, universal high income is a much larger concept that is not limited to a minimum income. It promises a guaranteed income that would be enough for a relatively high standard of living. We can look at it in this way: that universal basic income is more like a reform, while universal high income is a major transformation in relation to work and labor.

To analyze these two issues, it is important to examine their benefits and disadvantages. First of all, by providing a steady income to households, both universal basic income and universal high income address the job and income losses many have faced due to the latest technological advances.

The second benefit is that they can play a critical role in reducing poverty and global inequality by helping countries where many people still live below the poverty line. This can lead to financial security, less conflict and less stress, which generally improves the well-being of societies.

Third, if people are not dependent on wages to survive, this will give them more

time and freedom, which could lead to more creativity and innovation, entrepreneurship or simply taking care of others. The fourth advantage is that universal basic income and universal high income will likely reduce bureaucratic costs.

Nevertheless, one should not ignore the concerns regarding guaranteed incomes. Firstly, it is much easier said than done when it comes to the implementation of a universal income on such a large scale. For example, with a universal basic income, how would governments raise the funds to carry out such a program? This causes problems such as increasing government debt or taxation.

Another issue is inflation. If governments decide to provide a guaranteed income, meaning increasing people's purchasing power without expanding supply, two things could happen: prices could go up and the value of the currency could decrease.

A third problem is that the world still needs workers in some sectors. If a high income is provided to everyone, this

could fundamentally change individuals' relationship to work, impacting participation in the labor market. In other words, there would be less incentive to work.

We also should not look at this issue only through the economic and financial prisms. On the psychological level, there is the question of identity and purpose. Jobs and work have provided a sense of identity and purpose for centuries, so what would happen in a society where no one is required to work and yet still be guaranteed a high income?

Also, guaranteed incomes do not mean that inequality will be solved. Inequality could emerge in new forms, mostly in terms of status and position in society rather than income.

Finally, if either of these concepts are ever going to be implemented, universal basic income appears to be more politically feasible for the time being.

While, on the surface, both these models appear attractive and intriguing, a deeper examination shows that their implementation could involve substantial economic, political and social challenges.

Some influential people argue that we need guaranteed income programs due to the productivity gains driven by AI

Inequality could emerge in new forms, mostly in terms of status and position in society rather than income



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Opinion

250 years later, here is what America's founding fathers would think of Trump

The non-hallowed parts of the Declaration of Independence were the parts too incendiary for many 18th-century British newspapers, the libretto to Jefferson's familiar, soaring aria. In 2026 they also feel miserably familiar.

Stacy Schiff

What would the founding fathers say? You can write about American independence, especially this year, without fielding that question in every variation. To which political party would George Washington belong? What would Ben Franklin think of the tech bros? How would John Adams feel about failing to land a role in "Hamilton"? What would Thomas Jefferson make of the National Museum of African American History and Culture? And, of course, how would any of the founders reckon with a president who accepts extravagant gifts from foreign powers, puts his face on a 24-karat gold coin and commemorates the 250th anniversary of American independence with a mixed martial arts event on the White House lawn?

In a few cases we actually know the answers, because in the summer of 1776, Franklin, Jefferson and Adams signed the document we know as the Declaration of Independence. The Continental Congress had inflicted some 86 changes on Jefferson's draft, changes that landed like daggers to his heart. In the end, though, the members agreed to the text, affixing their names and pledging to the new nation their lives, fortunes and their "sacred honor." Only in the early 19th century did the document acquire its cult status, becoming the country's North Star, its creed and covenant. Nearly a half-century after he had written it, Jefferson explained "it was intended to be an expression of the American mind." As it turns out, then as now, the American mind was exploding with grievance. Most Americans can rattle off at least part of Jefferson's incandescent opening. But the next 650 or so words were the reason he composed the thing in the first place. They were the lines Congress worked over most obsessively. In

stance unless suspended in their operation till his assent should be obtained; and when so suspended, he has utterly neglected to attend to them."

By dictating policy to its governors, the crown overrode the will of its constituents. That's classic executive overreach—and a favorite maneuver of Mr. Trump, who has tried to block California's climate regulations, ding Colorado's artificial intelligence regulations (too "woke") and withhold funding for the Gateway tunnel connecting New York and New Jersey. Mr. Trump deemed the tunnel "a future boondoggle"—a remarkable claim from a man who ordered a military parade on his own birthday.

"He has refused to pass other laws for the accommodation of large districts of people unless those people would relinquish the right of representation in the legislature, a right inestimable to them and formidable to tyrants only."

Jefferson accused King George of trying to disenfranchise whole swaths of Americans. In February, Kristi Noem, who was then the homeland security secretary, announced that the Trump administration had "been proactive to make sure we have the right people voting, electing the right leaders to lead this country." Mr. Trump has insisted that Congress pass the SAVE America Act, which could prevent millions of Americans from voting. This spring he signed an executive order that sought to limit mail-in voting.

"He has dissolved representative houses repeatedly, for opposing with many firmness his invasions on the rights of the people."

When the Massachusetts assembly seemed in danger of passing laws that irked the king, the royal governor forced the legislature into recess or removed it from its Boston location. If it could not meet, it could not vote. Last July, when the U.S. House was considering forcing the release of the Epstein files, its members were sent home early for the summer to avoid holding a vote that would irk Mr. Trump. It seemed like a foolproof idea at the time.

"He has endeavoured to prevent the population of these states; for that purpose obstructing the laws for naturalization of foreigners; refusing to pass others to encourage their migrations hither, and raising the conditions of new appropriations of lands."

The colonists were eager to expand their ranks, which they understood to be essential to the American future. In 1773, however, they lost the right to naturalize immigrants, and the colonies erupted in fury. The Trump administration has issued a list of 75 countries from which applications for immigrant visas will not be processed, including Somalia, after Mr. Trump accused Somalians of "completely taking over" Minnesota. Only white South Africans need apply.

"He has made judges dependent on his will alone, for the tenure of their offices, and the amount and payment of their salaries."

When the crown decided to pay colonial judges directly, planting the judiciary beyond the people's control, the news arrived "like thunder in the ears," as Samuel Adams put it. Those charged with dispensing impartial justice became Adams' pet pains of the king. Is this different from Mr. Trump's attempts to curb "rogue" judges? Or the denunciation of judges who do not rule in his favor as "corrupt" and "deranged," or the dismissal of immigration judges who fall to deport people fast enough?

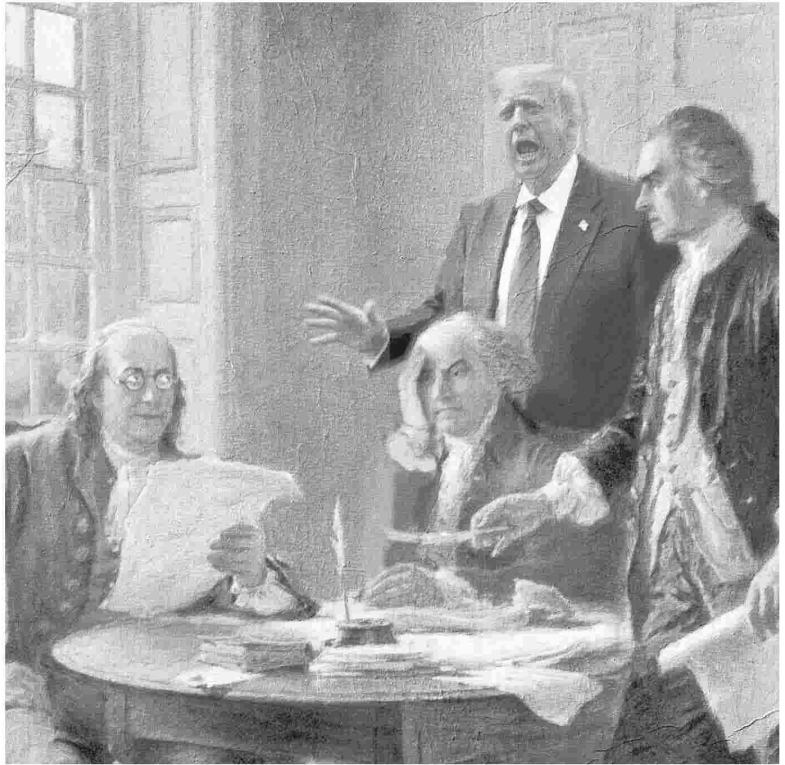
"He has erected a multitude of new offices, and sent hither swarms of officers to harass our people and eat out their substance."

At the front of Jefferson's mind were the customs agents the crown dispatched to collect revenue that the colonists considered extortionate. They find their modern equivalents in the I.R.S. agents whom Mr. Trump has reportedly planned to weaponize against political opponents—or in DOGE, which terrorized government employees whose sole offense was doing their job.

"He has kept among us, in times of peace, standing armies without the consent of our legislatures."

"For quartering large bodies of troops among us."

A decade before the Declaration, Franklin warned Parliament against dispatching troops to peaceful North America. "They will not find a rebellion," he predicted. "They may indeed make one." Four years later civilians and troops faced off in central Boston, on the evening we remember as the Boston Massacre. Minneapolis this winter returned it vividly to mind. Boston residents appreciated the troops housed in their public buildings about as much as the citizens of Minneapolis took to their occupiers, who were equipped with a selection of gear for close-quarters killing.



ILLUSTRATIONS BY RICARDO THOMAS

"He has affected to render the military independent of and superior to the civil power."

"For protecting them, by a mock trial from punishment for any murders which they should commit on the inhabitants of these states."

Even mock trials would deliver more accountability than we've seen for the killings of Renee Good and Alex Pretti. Stephen Miller, a White House deputy chief of staff, specifically told ICE agents that they had federal immunity and that neither city nor state officials could interfere with their duties. Judge Patrick J. Schiltz of U.S. District Court in Minnesota reproached the agency for defying nearly 100 court orders in one month alone—more, he said, than "some federal agencies have violated in their entire existence."

"For cutting off our trade with all parts of the world."

"For imposing taxes on us without our consent."

The colonists protested taxation without representation. Mr. Trump goes further: taxation without any hint of logic. He has imposed tariffs as high as 145 percent and then proceeded to change them—by one tally, more than 60 times, before the Supreme Court declared the entire effort to be unconstitutional. Mr. Trump justified his tariffs

any number of ways, though he has also invoked them to prosecute grudges, as Canada discovered when the president took offense at a political ad, and as our European allies discovered when they objected to his aggressive interest in purchasing Greenland. "To me," Mr. Trump has said, "the most beautiful word in the dictionary is tariff."

"For depriving us in many cases of the benefits of trial by jury."

"For transporting us beyond seas to be tried for pretended offenses."

No colonist was ever actually deported for trial abroad. London did, however, search for the legal means by which to do remove various opposition leaders. In the end no legal justification was found and no action was taken. The rule of law prevailed. The Trump administration has outdone King George, detaining and deporting American residents to countries where many of them had never before set foot. Mr. Trump has said he's considering doing the same for some U.S. citizens.

"He has abdicated government here, by declaring us out of his protection and waging war against us."

The central question of the 1770s was this: If the colonists were treated like enemy aliens, cast from the king's protection, did they owe him alle-

giance? Here we are again: The Trump administration has said that it is rescinding \$1.5 billion in health and transportation funds from blue states. It has sought to block their FEMA relief. It has canceled more than \$7 billion for clean energy projects—decisions that, according to a ruling by Judge Amit Mehta of U.S. District Court for the District of Columbia, the administration openly admitted it had made "based on whether the awardee resided in a state whose citizens voted for President Trump in 2024."

"He has plundered our seas, ravaged our coasts, burnt our towns, and destroyed the lives of our people."

Enough said. "He is at this time transporting large armies of foreign mercenaries to complete the works of death, desolation and tyranny already begun with circumstances of cruelty & perfidy scarcely paralleled in the most barbarous ages, and totally unworthy of the head of a civilized nation."

With this grievance, Jefferson was clearly turning up the heat. So is the Department of Homeland Security, which recently reported that it hired more than 12,000 officers and agents in four months. The department has done so using extremist language, with slogans seemingly borrowed from white nationalist groups. Who needs foreign mercenaries when you have a heavily armed, lightly trained domestic force?

The Declaration cannot be said to be having a happy semicentennial. Very little about the document feels remotely self-evident today. Certainly it has come in for a beating before and managed to recover: In 1857, Abraham Lincoln declared it had been "assailed, and sneered at, and construed, and hawked at, and torn, till, if its framers could rise from their graves, they could not at all recognize it." That was at another inglorious moment, in the wake of the Dred Scott decision, which flew directly in the face of a proclamation that was, as Lincoln observed, "held sacred by all."

The sacred principles are very well and good. But it is possible that in this document that defines us, that has made us who we want to believe we are a subject on which we seem universally even to agree—we've been memorializing the wrong part all along? The libretto may matter as much as that indelible aria.

At the end of his inventory of abuses and usurpations, Jefferson slips in a zinger: "A prince, whose character is thus marked by every act which may define a tyrant, is unfit to be the ruler of a free people."

STACY SCHIFF, the author of "The Revolutionary: Samuel Adams," is at work on a book about Benjamin Franklin.



the words of Samuel Adams, they represented a "catalogue of crimes of the deepest dye." They made the American case, in the most concrete terms, that King George III was guilty of every kind of abuse of power.

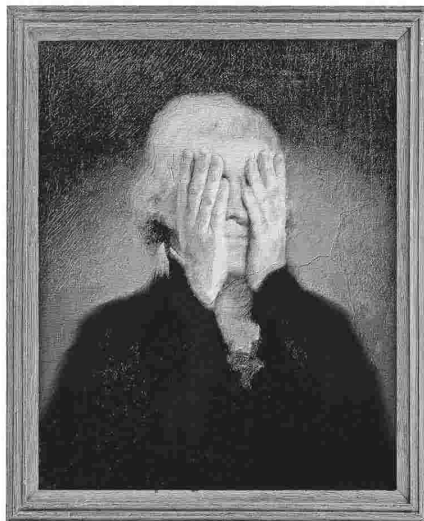
In Jefferson's accounting, the king had undermined the rule of law, the common good, the judicial system and the political process. It seemed there was little he had not corrupted. By the time Jefferson had finished, he had, as the historian Richard Bell has put it, turned King George into "Nero, Richard III and Attila the Hun all rolled into one."

For many who read the litany today, the resonance is unmistakable. So if you really want to know what the founders would say, you might do worse than review a selection of our founding 27 grievances. The nonhallowed parts of the Declaration were the parts too incendiary for many 18th-century British newspapers, the libretto to Jefferson's familiar, soaring aria. In 2026 they also feel miserably familiar.

"He has refused his assent to laws, the most wholesome and necessary for the public good."

Jefferson opened with a broad claim, asserting, as had any number of colonial petitions, that the crown obstructed perfectly beneficial laws. What was shocking then is an almost daily occurrence now, as the current administration has endeavored to repeal science, mutilate history, cripple essential services, gut standards, corrupt the administration of justice, dismantle the oversight of government, undermine higher education, silence a free press, deprive the armed forces of effective leadership, thwart the political process and line its own pockets—all at once.

"He has forbidden his governors to pass laws of immediate and pressing impor-



OPINION

The New York Times

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The president is losing the normie Republicans

Kristen Soltis Anderson

We often talk about Republicans as members of two easy-to-understand factions: MAGA die-hards and Never Trumpers. But the most electorally critical slice of the Republican electorate, about half of all Republicans today, generally falls into neither camp. This slice is neither Republicans in exile who voted for Kamala Harris nor is it the Trumpist faithful.

Let's call these voters "normie" Republicans. It's with this group that the G.O.'s most immediate political challenge really lies.

As a pollster who studies voters and the shifting coalitions of our two major political parties, I'm frequently asked how various actions taken by President Trump, such as his decision to attack Iran, will resonate with his core supporters. As I wrote a few weeks ago, polls have shown that Mr. Trump's MAGA base is sticking with him.

But what about the rest of the party? The normies are fairly supportive of Mr. Trump's presidency, even if they're not in lock step with him on every issue. Most report watching Fox News, and most hold deeply unfavorable views of Mr. Trump.

They're neither Never Trumpers nor independents, but they're increasingly meh on MAGA.

foremost as supporters of Mr. Trump, and they have displayed increasing disaffection with the direction of the country under his leadership. They generally think his combative posts on Truth Social are harmful to the Republican cause. Most of them do not consider themselves part of the MAGA movement.

The flagging enthusiasm of these normies ought to be a powerful alarm bell for Republican candidates looking to win the 2026 elections.

To be clear, Mr. Trump remains a popular figure among Republican voters, with 86 percent holding a favorable view of him in my polling, not far off from the 90 percent who held a favorable view of him a year ago. If you want to understand why Republican lawmakers have thus far been reluctant to cross the president, look no further than those numbers.

But under the surface, there are signs that for some Republicans, the thrill is gone. Since last year, the percentage of Republicans who felt very favorably toward the president has fallen by 10 points. Only 44 percent of Republicans strongly approve of his handling of the economy.

As these trends have unfolded, the number of Republicans who say they think of themselves more as support-

ers of the party than of Mr. Trump has risen substantially.

The good news for Republican candidates is that 68 percent of these party-first Republicans say they're extremely likely to vote, comparable to the 71 percent of Trump-firsters who say the same. And they're not exactly defecting to vote for the Democrats; 91 percent of party-first Republicans expect to vote for a Republican in the midterms.

But when my polls ask how motivated they are to vote, the gap widens enormously. While 62 percent of Trump-first Republicans describe themselves as extremely motivated, less than half — 49 percent — of those party-first Republicans say the same.

This matters because Democrats are essentially telling pollsters they will walk across hot coals to get to the polls. Fox News's most recent poll finds that more Democrats than Republicans are "extremely" motivated to vote. In my own polling, 82 percent of Democrats say it's "extremely important" to win the midterms and stop Mr. Trump from carrying out his agenda — while only 57 percent of Republicans say that it is similarly important for their party to win. That number falls to 47 percent among party-first Republicans.

What's driving this discontent? The economy is one clear factor: Only 29 percent of party-firsters strongly approve of Mr. Trump's handling of the economy, and less than half describe the issue as "improving." They are also less upbeat about their own party on issues such as health care, foreign affairs and the overall state of democracy. They aren't widely convinced things are becoming more stable in the country. Only around one-third strongly support the U.S. military operations in Iran.

That situation could improve if the economic outlook brightens, or if the war with Iran results in what these Republicans consider a victory. It's conceivable that as the midterms approach, the normies come home to Mr. Trump. And winning back some of the independents who are giving Mr. Trump horrible ratings on his handling of the economy and Iran would be a much-needed boost to Republican candidates' fortunes.

Failing that, what will Mr. Trump and Republicans' strategy most likely be to increase Republican voter turnout? Go negative, negative, negative. The one thing that unites Trump-firsters with the rest of the party is disdain for the Democrats, including notable figures like Gavin Newsom and Alexandria Ocasio-Cortez.

Democratic voters clearly feel that the stakes are sky-high in this election. Mr. Trump's most loyal supporters do, too. Many normie Republicans aren't so sure. If they decide to stay home in November, it will probably spell electoral disaster for the G.O.P.

KRISTEN SOLTIS ANDERSON is the author of "The Selfie Vote: Where Millennials Are Leading America (and How Republicans Can Keep Up)."



BRENDAN COONEY

Give us the aliens already

Neil deGrasse Tyson

Ever since childhood I've wanted to be abducted by aliens. Now, as a professional astrophysicist armed with the knowledge of the size, age and composition of the cosmos, I know that nothing prevents any of us from imagining a universe teeming with life.

So the impending release of U.S. government files on aliens and U.F.O.s is a good thing, even if it feels like a distraction from other important files we've all been waiting to be disclosed. I expect the alien files will be anticlimactic. After a parade of alien insiders and whistle-blowers testified under oath to Congress in 2023, 2024 and 2025, what's left to learn?

Personally, I'd be delighted if the files were accompanied by an actual alien. Alive or dead or undead. Preferably alive. Is that too much to ask for?

The whistle-blowers have already told us about the crashed flying saucers, extraterrestrial bodies and alien technology in our possession — hidden in undisclosed places. Not only that, but secret files have been declassified before. A 2017

headline in this newspaper was unambiguous: "Glowing Auroras and 'Black Money': The Pentagon's Mysterious U.F.O. Program." And who could forget the Air Force's Project Blue Book, which studied more than 12,000 U.F.O. sightings from 1952 until the project was terminated in 1969, with the goal of assessing threats to national security.

What's clear, however, is that if an authentic alien walked out of the halls of Congress, nobody would ever again have to ask if you "believe" in aliens, just as nobody questions the existence of elephants. An alien of the alien files could become the literal elephant in the room.

Without good evidence of what actual aliens look like, we're stuck imagining them. And when we do, we do it on an online database about entertainment, lists hundreds upon hundreds of films, TV shows, video games and documentaries about aliens — both friendly and evil. Mostly evil.

Disappointingly, in nearly all these portrayals, these aliens look a lot like us. They're humanoid, with a head, two eyes, a nose, a mouth, a neck, shoulders, a torso, arms, fingers and legs. Remember that most life on Earth, with which we have DNA in common, looks nothing like us or your vibrant animal. So we should expect aliens with no DNA in common — or no DNA at all — to look at



ILLUSTRATION BY SAM WHEAT/THE NEW YORK TIMES. SOURCE PHOTOGRAPHS BY NEIL DEGRASSE TYSON AND FLORETTA BAZES

least as different from humans as life-forms and other life-forms on Earth (like jellyfish or termites) look different from each other.

The only thing that would shock me about a living, declassified alien is if most Hollywood depictions ended up being right, violating everything we know about biodiversity on Earth and across the universe.

We care a lot about what aliens look like, but we don't pay nearly enough attention to what we might look like to them. If an alien emissary landed in Los Angeles, for example, its first impression might be that Earth's dominant life-form is the automobile. The city is heavily crisscrossed by major freeways, many of them 12 lanes wide. People line up in their cars on slow lines to obtain fast food handed through a window. They consume the food while still seated, never exiting their vehicles.

Some of the larger life-forms on the

freeway carry multiple automobiles within them. To the aliens, these car haulers are surely pregnant.

Assuming an arrival that the alien knew we were human, it would probably want to meet the person in charge. Who exactly would that be? The president? The prime minister? The pope? Or would it be a multimillionaire or captain of industry? Not knowing anything in advance about human civilization, but picking up clues from our cultural norms before arrival from leaked radio waves, an alien might instead expect to meet Ryan Gosling, Taylor Swift or Oprah Winfrey.

If we look more deeply into our own alien stories, there's a persistent plotline that aliens are evil and want to kill us all. I suspect those fears are based not on what we believe about aliens but on what we know about humans.

In the history of our species, there's no shortage of technologically advanced

cultures that commit rampant violence against less-advanced ones. Within what we call civilization, humans oppress — or kill — one another over which creator of the universe they worship, or who they sleep with, or what side of an arbitrary line on Earth's land masses they're born, or how absorbent their skin is to sunlight, or what set of sounds comes out of their mouths.

Upon bearing witness to our irrational ways, any visiting alien that might have accompanied the release of the alien files surely long ago escaped back home to report, "There's no sign of intelligent life on Earth!"

NEIL DEGRASSE TYSON is an astrophysicist who is the director of the Hayden Planetarium at the American Museum of Natural History in New York City. He is the author of "Take Me To Your Leader: Perspectives on Your First Alien Encounter."

We'll all miss OPEC

BORDOFF, FROM PAGE 1

OPEC producers, the U.A.E. invested heavily to expand its production capacity, only to find itself constrained by quotas that limited the payoff. But the timing and manner of its exit — without first aligning with Saudi Arabia, OPEC's de facto leader — cannot be understood through oil markets alone. It also reflects politics. Senior Emiratis have voiced their anger that regional partners such as Saudi Arabia did not stand more firmly with the U.A.E. as it absorbed a disproportionate share of Iranian attacks over the past two months.

The U.A.E. also probably chose to move now because its exit will have little impact under current circumstances. At any other moment, the break would have sent oil prices sharply lower, on the assumption that the U.A.E. would boost output and Saudi Arabia might follow. But with the Strait of Hormuz closed, neither can increase production even if it wanted to. Once the Strait reopens, OPEC members will need to produce at high levels to offset the months in which they could sell little of their oil.

Over time, the U.A.E.'s exit could make OPEC less effective at managing the oil market — adding barrels to the global supply when prices soar and removing them when prices crash. Saudi Arabia and the U.A.E. have been the only OPEC producers with the spare capacity to substantially cushion price spikes. If the U.A.E. produced full-on outside the cartel, that buffer would shrink. The Saudis have always played the largest role in this market steadying, but their willingness to cut their production may also fade if a major neighbor benefits from Saudi restraint without contributing cuts of its own.

More countries may exit OPEC, following the U.A.E., Angola, Ecuador and Qatar, all of whom have left since 2019. A less effective OPEC might seem a blessing when prices fall, but it could force the world to endure more frequent booms and busts.

The greater oil price volatility that might be in store would be costly. When oil prices swing sharply, consumers



ARIEL LAVIN

become less confident about what they will spend on gasoline, heating oil or air travel. Businesses shorten planning horizons and postpone investments. Energy producers may delay drilling, while companies that use a lot of energy hesitate to expand when future fuel costs are more uncertain.

The best response is to make the U.S. economy less vulnerable to oil price shocks. That starts with refilling the Strategic Petroleum Reserve, which has been drawn down by both political parties yet remains an important source of crude in times of need. America's leaders should also think more creatively about how the government could help smooth the effects of boom-and-bust oil price cycles. For example, fuel taxes could rise when oil prices fall and decline when prices spike, or oil company taxes might increase when prices soar and ease when they slump.

Even more effective would be reducing the economy's exposure to oil. America's high levels of oil production help the country better withstand price shocks, but even more important have

been moves to cut its dependence on oil. Imposing stronger fuel economy standards on cars and trucks, offering more incentives for buying electric vehicles and building transportation alternatives like high-speed rail and public transit are economic security necessities, not just climate ones.

When oil shocks hit, Washington inevitably scrambles to ease the pain. But the most effective defenses take time to build. Energy security should not be measured by whether OPEC is weaker, or by whether politicians have someone to blame when prices spike, but by whether the next inevitable swing in oil prices hurts less than the last one.

JASON BORDOFF is the founding director of the Center on Global Energy Policy at Columbia and a professor of professional practice in international and public affairs. He served in President Obama's administration from 2009 to 2013, as a senior director on the U.S. National Security Council and as a special assistant to the president.

FROM READERS

The U.S.A.I.D. tragedy

Re "Painful year of struggle for fired staff of U.S. aid agency" (News, April 25).

The stories of those who lost their jobs because of the dismantling of the U.S. Agency for International Development are heartbreaking. But what makes this a national and global tragedy, not just a personal one, is how desperately these people are still needed at the State Department.

Given the Trump administration's slash-and-burn approach to foreign aid, you might think that the United States is out of the foreign assistance business. But Congress has continued to appropriate funds in many areas the Trump administration tried to cut, particularly those that support the world's most vulnerable children and families.

The most recent budget includes \$915 million for maternal and child health, \$524 million for family planning and \$691 million for basic education, all areas that the Trump administration essentially zeroed out in its budget request. The State Department had never run programs in these areas.

After firing virtually all of the U.S.A.I.D. experts, who exactly is going to ensure that those funds reach the most vulnerable children and families, now that Congress has restored the funding?

The irony of the bogus "waste, fraud and abuse" accusations hurled against U.S.A.I.D. is that the risk of waste, fraud and abuse is now higher than ever without the experts on board. REBECCA LEVY, WASHINGTON The writer is a former U.S. government special adviser for children in adversity at U.S.A.I.D. and the associate director of the Collaborative on Global Children's Issues at Georgetown University.

CORRECTION

Thomas L. Friedman's column on May 4 incorrectly stated the name and cost of the materials Israel used to thwart munitions from Hamas. They were Iron Dome interceptors, not Patriot missiles. And it cost \$40,000 to \$50,000 to intercept each missile, not \$4 million.

COMMENT

Editorials

US should reciprocate China's readiness to work to stabilize and improve relations

Chinese Premier Li Qiang, top lawmaker Zhao Leji and Foreign Minister Wang Yi held separate meetings with a bipartisan delegation of US senators led by Republican Senator for Montana Steve Daines in Beijing on Thursday.

The three meetings conveyed a consistent message from the Chinese side: China and the United States should strengthen communication, properly manage differences and work toward a stable and healthy bilateral relationship.

At a time when uncertainty continues to cast long shadows over the world economy, stable China-US relations bear directly on the well-being of the peoples of both countries and on world peace and prosperity.

It was emphasized in the meetings that the key to stable relations is to keep working on bridging the perception gaps between the two sides. The two countries should endeavor to seek "harmony without uniformity" and choose to be partners instead of rivals.

Since Daines' previous visit to China in March 2025, considerable changes have taken place in not only China-US relations but also the broader international situation.

Through their direct interactions with the Chinese side and firsthand observations in China, the members of the delegation have had an opportunity to better appreciate the importance of China-US ties and the vital role both countries can play in promoting global stability and development.

In his meeting with the US delegation, Li expressed China's readiness to enhance dialogue and communication, and create a favorable atmosphere for exchanges at all levels and cooperation in various fields, so as to strive for more practical achievements between the two countries.

It was stressed in the meetings that the Taiwan question is the first and inviolable red line in China-US relations.

Both the US legislature and government should

realize that the Taiwan question concerns the very core of China's core interests and constitutes the bedrock of the political foundation of China-US relations. China's resolve to safeguard its territorial integrity is unwavering and must not be underestimated. If the US side really cares about peace across the Taiwan Strait, it should stop sending wrong signals to the "Taiwan independence" forces on the Chinese island.

Adhering to the one-China principle and the three Sino-US joint communiques, as well as honoring the commitments made by successive US administrations regarding the Taiwan question, are prerequisites for the stable development of Sino-US relations. These are international obligations that the US side must fulfill.

Li urged the US lawmakers to bear in mind the broader interests of China-US friendship and cooperation, and view and handle China-related issues with prudence, thereby playing a constructive role in the sustainable development of bilateral relations.

Zhao signaled the willingness of China's top legislature to strengthen engagement with the US Congress, facilitate increased exchanges and mutual visits, extending a welcome to more US lawmakers to visit China.

It is hoped that the US senators, who play a key role in influencing US lawmaking and policymaking, will view China objectively, understand China rationally, respect China's core interests earnestly, manage differences properly and join hands to do more major, practical and good things that are beneficial to both countries and the world, as Wang stressed.

The visiting US senators should comprehend Beijing's stance that mutual respect is the foundation for bilateral ties, peaceful coexistence the guiding principle and win-win cooperation the objective. The hard-won stability in bilateral relations should be cherished, so that the two sides can work together to explore a proper way for major countries to get along with one another.

Regulatory overreach masks EU's malaise

The European Union's instinctive response to technological anxiety is paperwork, suspicion and the politicizing of economic relationships.

The latest manifestation of this tendency is a revised EU Cybersecurity Act proposed by the European Commission, which would allow Brussels to classify certain countries as states of "cybersecurity concern" and designate companies as "high-risk suppliers" based on vaguely defined "non-technical risks". Suppliers from targeted countries could effectively be excluded from entire supply chains across 18 critical sectors.

This is nothing more than pride and prejudice. According to a report released by the China Chamber of Commerce to the EU and KPMG on Wednesday, replacing Chinese equipment under the proposed framework could cost the EU as much as €367.8 billion (\$432.6 billion) over the next five years. That is equivalent to the GDP of a mid-sized EU economy. Yet Brussels appears willing to absorb the economic pain in pursuit of a strategic doctrine that remains deeply subjective.

The problem lies in how the EU is defining risk. "Technical vulnerabilities can be tested, audited and corrected. "Non-technical risks", by contrast, are inherently ambiguous and elastic. Once security becomes detached from verifiable engineering standards, regulation risks becoming an ideological instrument.

As a spokesperson for China's Ministry of Commerce said, the draft law introduces arbitrary standards that weaponize supply chains under the banner of "security", while undermining the principles of market competition and nondiscrimination that the EU itself once championed.

If "high-risk supplier" becomes a geopolitical label, rather than a technical assessment, then any foreign company can theoretically be excluded at any moment in accordance with which way Brussels decides the political wind is blowing.

Former European Central Bank president Mario Draghi's warnings about the EU's competitiveness crisis — a widening productivity gap, slow growth and weakening industrial power that risk a "slow and agonizing death" of the EU's economic model — have not been subtle. Yet they have not been heeded.

Instead, Brussels increasingly behaves like "a regulatory overlord" presiding over a shrinking estate that is being sold off to pay for the upkeep of the manor. The EU is already struggling with sluggish growth, industrial erosion, energy insecurity and declining global competitiveness. It should pause before traveling too far down this road.

As the EU is debating sweeping supplier exclu-

sions, German Foreign Minister Johann Wadepuhl has reportedly advanced proposals for broad institutional reform within the EU itself, arguing that Europe must adapt more effectively to geopolitical and economic realities. It can't keep centralizing more regulatory authority while becoming further detached from industrial realities.

Some of the EU's lawmakers appear astonishingly distant from the sectors they regulate. Technology legislation is frequently written through the narrow lens of political symbolism rather than operational practicality. Industrial policy becomes performance geopolitics. Business considerations become moral theater.

The consequences are visible. The EU wants green transition leadership while burdening manufacturers with costs competitors do not face. It wants digital sovereignty while depending heavily on imported technologies. It wants strategic autonomy while reducing supplier diversity. The contradictions grow sharper with each new regulatory package it unveils.

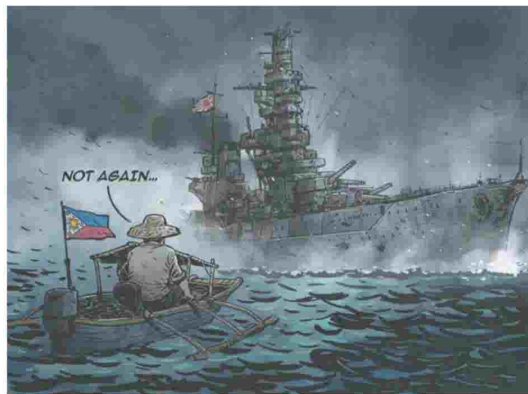
The revised EU Cybersecurity Act risks becoming another example of the EU confusing strategic caution with economic self-harm. The irony would be particularly acute in telecommunications and digital infrastructure. Chinese suppliers became deeply embedded in the EU's markets thanks to their high cost-performance and proven reliability. Retrofitting or dismantling large portions of these systems will not magically create stronger European alternatives overnight. It will simply increase the costs for consumers, delay infrastructure upgrades and deepen Europe's investment burden during a period of already weak economic momentum.

The EU speaks the language of openness while practicing selective exclusion. That inconsistency damages its credibility in the world market, where many emerging economies see growing European enthusiasm for "de-risking" as little more than a softer euphemism for economic protectionism.

There is a distinction between rigorism standards and politically expandable categories that can be stretched to fit shifting strategic anxieties. Brussels should reconsider the most problematic aspects of the draft law: the designation of countries of "cybersecurity concern", the ambiguous "non-technical risk" criteria and the sweeping restrictions attached to "high-risk suppliers".

If the EU truly wishes to adapt to a harsher global era, it must reconnect its policymaking and lawmaking with economic realities rather than ideological abstraction. Otherwise, the EU may discover too late that its greatest vulnerability is not foreign technology but its regulatory addiction.

Cai Meng



Opinion Line

FIFA pricing risks alienating premium product-making fans

The 2026 FIFA World Cup has already been sold as the biggest ever: 48 teams, three host nations, a projected \$13 billion in revenue and a corporate footprint sprawling across North America like a traveling trade expo. Somewhere in between lies the faint outline of an actual soccer tournament, watched by actual people, many of whom are increasingly being priced out of it.

It is as if FIFA were standing in the middle of the world's most popular sport like a luxury landlord rattling a velvet donation bucket insisting that the rent must go up again because demand is "historic".

Negotiations over China's broadcasting rights for the 2026 World Cup remain stalled, with FIFA demanding \$300 million, 17 times what it is charging India, a country with a comparable population. This despite the fact that China's men's national team did not qualify. That absence alone dramatically alters the economics of the tournament in China. Without the Chinese team, domestic enthusiasm has inevitably softened. Advertisers know this. Sponsorship appetite has cooled. The longer FIFA clings to fantasy valuations, the more sponsors will simply turn their attention elsewhere.

Besides, this is not 2002, when families gathered around television sets at home, or even 2010, when live broadcast still held sway. The death of CNN founder Ted Turner on Wednesday is itself an elegy for the decline of the television network. Chinese viewers now consume soccer through frag-

mented streams, mobile highlights, social clips and flexible digital platforms. Younger audiences are perfectly comfortable catching goals after they have been scored rather than sacrificing sleep for group-stage kick-offs. In that environment, FIFA's pricing model looks more like figures plucked out of the ether.

There is another layer of absurdity here. Chinese journalists have reportedly faced prolonged visa delays that have prevented many outlets from securing on-site studios, commentary positions and working facilities in time for the tournament, which kicks off in the United States on June 11. Reduced access inevitably means reduced broadcast quality. Yet FIFA still appears determined to charge champagne prices for watered-down beer.

And then there are the tickets. This week the FIFA chairman defended soaring World Cup ticket prices by arguing they reflect the US market. It's difficult to track exact 1994 US World Cup ticket prices, but according to ESPN, prices ranged from \$25 to \$475 per match. For the final between Brazil and Italy, some tickets exceeded \$1,500. Adjusted for 2026 inflation, that means tickets roughly ranged from \$55 to \$1,050, with the final costing the equivalent of about \$3,300 today. In sharp contrast, attending eight matches at the 2026 World Cup (one per round) costs roughly \$6,900 for the cheapest category tickets — and up to \$16,400 for the most expensive, as per BBC Sport.

Soccer has always sold dreams. FIFA has decided to sell exclusivity instead. This is the danger of over-commercializing a sports spectacle. The World Cup is not the Super Bowl. It is not Coachella with shin pads. It belongs, at least morally, to billions of people who invest themselves emotionally in the game every four years.

FIFA should understand the risks of overestimating its hand. This is, after all, the same organization whose recent history includes the 2015 FIFAgate, a scandal that revealed systemic bribery, opaque governance and industrial-scale self-interest inside soccer's ruling structures. Yet the institution survived, repainted itself in the language of reform, then resumed accumulating money with renewed enthusiasm.

Which raises the obvious question. Who watches over FIFA now?

Because soccer governance increasingly resembles a closed financial ecosystem answerable mainly to itself. Even former insiders have openly criticized FIFA's lack of accountability.

The World Cup should be the great festival of sport for the world. Instead, FIFA risks transforming it into a gated premium product wrapped in the rhetoric of global unity.

China's broadcasters are right to resist unrealistic pricing. Fans everywhere are right to complain about ticket costs. And FIFA would do well to remember a simple truth: soccer made FIFA rich. FIFA did not make soccer beloved.

— LIYANG, CHINA DAILY

What They Say

APEC crucial cohesion platform in Asia-Pacific

Editor's note: The second Asia-Pacific Economic Cooperation Senior Officials' Meeting and related events will be held in Shanghai from Monday to May 19. People's Daily Overseas Edition spoke to Tu Xinquan, dean of the China Institute for World Trade Organization Studies at the University of International Business and Economics, and Zhang Jingjia, an associate researcher at the APEC Study Center of Nankai University, on China's role in the forum. Below are excerpts of the interview. The views don't necessarily represent those of China Daily.

At a time when geopolitical conflicts are disrupting global value chains and multilateral mechanisms are under strain, APEC is one of the few frameworks where economies can still sit down together to discuss trade and economic cooperation pragmatically. This gives the mechanism practical significance.

By promoting upgraded connectivity initiatives and striving for tangible results in physical, institutional and people-to-people connectivity, APEC economies can better withstand external shocks and enhance regional economic resilience.

At the same time, APEC can accelerate the green and innovation-driven transformation across the region. Greater cooperation in clean energy, green minerals and environmental protection will help member economies move toward smarter, greener and more digital growth while reducing dependence on traditional fossil fuels. Innovation-led transformation is essential for the long-term sustainable development of the Asia-Pacific. It can also create new engines of growth in times of uncertainty.

The Asia-Pacific region still holds enormous potential for economic growth and trade cooperation. China is the largest trading partner for nearly all the APEC members, giving it an important role in regional cooperation. Despite frictions between China and the United States and Japan, economic and trade ties remain a vital bridge. They continue to play an irreplaceable role in maintaining relations and supporting regional stability.

In this context, APEC serves as both a stabilizer and a source of cohesion for the Asia-Pacific region. More importantly, it provides a valuable platform for leaders and officials at different levels to engage in practical discussions and sustained communication. Even when differences and disputes persist, dialogue remains essential to regional stability and economic certainty. This is precisely why APEC's role cannot easily be replaced.

China's three priorities for APEC 2026 — openness, innovation and cooperation — can help reinforce the focus on regional shared develop-

ment. They also reflect both China's strengths and its vision for the future of APEC and the wider world.

The country has demonstrated a firm commitment to expanding opening-up through a series of concrete measures this year. It is also a strong supporter of the multilateral trading system and the World Trade Organization. Regarding innovation, China has become one of the world's major innovation hubs, particularly in manufacturing, and is well-positioned to contribute more to APEC's innovation-driven development. When it comes to cooperation, China has consistently advocated partnership rather than confrontation, a position that aligns closely with APEC's core principles.

Although China remains a developing country, it is making tangible contributions to global development and regional prosperity by expanding market access, increasing outward investment, deepening supply chain cooperation and strengthening technological collaboration. It also advocates stronger connectivity and more resilient supply chains.

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VIEWES

Jiang Jianguo

China's right path to human development

China is promoting the well-rounded personal development of its people and the all-around advancement of human rights. These goals were part of the Communist Party of China Central Committee's recommendations for formulating the 15th Five-Year Plan (2026-30), as well as the plan's outline approved by national lawmakers.

Together, the two documents provide guidance for the country to put into practice the idea that "living a happy life is the primary human right".

"Putting the people first" is the fundamental principle guiding China's pursuit of well-rounded personal development of the people and advancement of human rights in all fields in the new era.

Chinese modernization is ultimately measured by the growth and development of the people. Its purpose is to stimulate the people's initiative and creativity by enhancing their capabilities and competence.

Promoting well-rounded personal development essentially means following a people-centered approach and upholding the commitment to respect, empower and support the people and facilitate their progress while advancing human rights.

Human rights are interdependent and must be advanced comprehensively through a systematic approach.

China's pursuit of all-around advancement of human rights is reflected in its efforts to build a human rights protection system covering all fields, improve the protection of all rights, and channel more public resources into core areas of personal development.

Both the recommendations for the 15th Five-Year Plan and the plan's outline place emphasis on investment in human capital that is key to promoting both well-rounded personal development and all-around advancement of human rights, as people themselves are the fundamental goal of modernization.

On the one hand, more public resources are being directed to sectors related to livelihoods, such as education, employment, healthcare and social security.

On the other hand, the country is aligning investment priorities to ensure that resources are allocated to safeguard and promote people's rights.

The focus is on meeting people's basic subsistence needs, boosting the quality of life, and ensuring people live a life of security, stability and dignity.

By improving the basic public service system and the social security system, the aim is to establish a network to protect subsistence rights that covers all people and ensures their well-being throughout their lives.

Unlocking people's potential is another



MA XUEJING / CHINA DAILY

major goal. Investment in human capital will help enhance people's ability to grow, participate and create. The documents emphasize removing barriers to personal development and call for improving the lifelong learning system, optimizing human resource development, and refining the country's employment support mechanisms so that

different groups of people enjoy greater parity of opportunities.

The recommendations and the outline lay a solid institutional foundation for the advancement of human rights. They call for continued improvement in the institutions, standards and procedures for whole-process people's democracy as well as coordinated efforts to promote

sound legislation, strict law enforcement, impartial administration of justice and observance of the law by all.

The documents also aim to facilitate upward mobility of people. They attach importance to creating an environment of fair competition, making rules and policies more fair to ensure equal opportunities, and improving the institutions for coordinated development among different regions and between urban and rural areas.

As China's human rights cause starts a new chapter, the country needs to develop human rights theories based on its own practice and accelerate the building of its own human rights knowledge system.

China's human rights cause has given rise to new concepts such as "living a happy life is the primary human right" and "the rights to subsistence and development are the primary and basic human rights".

There is an imbalance between human rights knowledge provided by the Global North and that provided by the Global South.

Continued efforts are therefore needed to draw inspiration from China's modernization, build China's human rights theoretical framework and help address that imbalance.

China also has to build a more vivid narrative, allowing the world to know better about its human rights achievements.

Chinese modernization provides both the material and a solid foundation for the country to tell its human rights story. Since it entered the new era, China has made remarkable achievements in human rights.

Human rights have been promoted through development, protected through reform and improved through governance. These macro-level achievements should be translated into multi-dimensional and relatable stories.

By sharing with the world its human rights stories and insights, China can help make global human rights governance more just, equitable and inclusive.

At present, global human rights development still faces many challenges, including hegemonism, regional conflicts and extreme poverty. China has adhered to inclusive development, pursued the common human aspiration of "human rights for all" and created favorable conditions for developing countries to share in development gains.

Going forward, the country needs to continue strengthening international human rights and building a community with a shared future for humanity.

The author is the executive vice-president of the China Society for Human Rights Studies.

The views don't necessarily reflect those of China Daily.

Li Juncheng

Young urban ears increasingly tuning into podcasts

A subway ride, a treadmill, a late-night walk home: all these are places where podcasts have quietly taken root. For many young urban people, listening has become part of the daily rhythm.

An episode on the morning commute, another at the gym, one more before bed — this is not a niche habit, but simply how people live now.

The rise of podcasts can be traced back to around 2020. The pandemic changed how people moved through daily life. Commutes shrank, travel stopped, and working from home became routine for many.

Time once used for socializing, commuting, or light entertainment needed a new home. Podcasts stepped into that space with unusual ease. They were easy to access, easy to fit into daily routines, and rich enough to offer both information and company.

The growth has been fast. China is now one of the world's fastest-growing podcast markets. By 2025, the number of Chinese-language podcast listeners was expected to cross 150 million, while the total market revenue may have exceeded 5 billion yuan (\$733.5 million). In the competition for attention, podcasts have claimed something rare: uninterrupted time.

That is one reason podcasts feel different from so much of today's content. Short-form video is built for speed and surprise. Podcasts ask for something else. A conversation can stretch across 40 minutes, an hour, or sometimes even longer. There is no rush to the punchline, no need for visual fireworks. The human voice carries the experience. It can sound casual, intimate, thoughtful, even reassuring. That is a big part of the medium's power.

In a world crowded with noise, they offer a different kind of attention. In a world driven by speed, they make room for thought.

Podcasts also fit naturally into moments when the eyes are busy but the mind is free. Walking, running, cooking, driving, folding laundry — these are all times when audio makes sense. A podcast can turn spare minutes into something fuller and make a daily routine feel less empty.

Still, the appeal of podcasts goes beyond convenience. They also answer a quieter emotional need.

A listener who cannot sleep at night may listen to a familiar host talking about a book, a film or simply the events of the day. The effect can be surprisingly comforting. Research suggests that listening to the human voice can prompt the release of oxytocin, often called the "trust hormone", which is linked to reduced stress and a greater sense of closeness. Podcasts make use of that effect in an understated way. Over time, the relationship between host and listener can become almost personal.

The boom has been helped by the range of people making podcasts. In August 2025, public figures such as Luo Yonghao and Chen Luyu entered the field with video podcasts. At the same time, independent creators have continued to bring their own voices, expertise and obsessions into the mix.

The result is a broad soundscape that now includes culture, science, dialects, folklore, philosophy, and new occupations. On Xiaoyuzhou, a major platform, 2025 saw more than 64,000 new podcast shows and nearly 700,000 new episodes.

That is where podcasts start functioning as an alternative publishing world. In the traditional book market, many subjects never find a strong commercial home. They may matter deeply to a small audience, but they are too specialized to justify a print run. Podcasts remove that barrier. With a smartphone, a microphone, and a quiet room, a creator can speak to thousands of people who care about the same narrow subject.

That helps explain why podcasts are becoming culturally important in ways that are easy to overlook. In Linyi, Shandong province, a group of Jin dialect enthusiasts launched a podcast to explore and preserve their local dialect. In Hangzhou, Zhejiang province, several podcasts have moved offline, turning digital conversations into live cultural gatherings.

These examples are small, but they point to something larger. Podcasts can strengthen connections between people and places and turn shared interests into real communities.

Of course, the industry still has real problems. Content quality varies widely, business models are uneven and regulation is still catching up. But new cultural forms often look less important than they later prove to be.

Online literature once seemed like a side current; it later fed a much larger IP economy. Podcasts may follow a similar path. As more high-quality original content moves toward sustainable paid models, the medium could become a stable part of the digital cultural landscape.

The appeal of podcasts lies in depth, sincerity, and voice. They are rooted in ordinary life, shaped by ordinary people, and carried by ordinary moments. That is precisely why they matter.

In a world crowded with noise, they offer a different kind of attention. In a world driven by speed, they make room for thought. And in the space between one voice and another, they are helping shape a new kind of mass culture.

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The views don't necessarily reflect those of China Daily.

Asit K. Biswas, Wang Hao and Cecilia Tortajada

Flood of opportunities in ecological preservation

The idea of ecological civilization was first introduced during the 17th National Congress of the Communist Party of China in 2007, marking a new direction in the country's social and economic development. In 2012, it became even more central when it was included in the "five-in-one" framework, placing environmental protection alongside economic, political, cultural, and social development.

The importance of the concept has continued to grow. In 2017, ecological civilization was described as a long-term goal for China's future, and, in 2018, it was written into its Constitution.

Today, it is a key concept shaping how the country approaches development. In recent years, China has made remarkable progress in embedding ecological civilization effectively into its development planning.

A major challenge to the country's continuous socioeconomic development during the post-2020 era has been that the climate, as in the rest of the world, has been changing much faster than scientists had expected. Fortunately, the concept of ecological civilization has provided an important framework within which the issues associated with climate change can be properly addressed.

One of the clearest signs of climate change is the shifting patterns of rainfall. Since the early 2000s, northern China, traditionally a water-scarce area, has

been receiving more rainfall than before, while some areas along the Yangtze River have been recording less rain.

This climate shift is gradually changing China's ecological landscape.

These changes are closely linked to the increase in global warming. Rising temperatures are making extreme weather conditions more frequent and intense, and sometimes for longer durations.

For example, more typhoons are moving faster northward in the country, increasing the risk of heavy rainfall, and thus increasing economic losses in inland regions.

As a result, areas that once faced regular droughts now have to face new challenges such as severe storms and floods. Against this backdrop, ecological civilization is helping China respond to both new opportunities and unfamiliar challenges. Increased rainfall is easing water shortages in northern and northwestern regions.

Across the Mongolian Plateau, for example, surface water bodies and wetlands have shown clear signs of recovery since 2010. These changes are opening up new environmental and economic possibilities.

In Inner Mongolia autonomous region, this trend can already be observed. East Juyan Lake, which disappeared in the late 20th century, has reappeared in recent years. Wuliangshui Lake has begun to stabilize after years of steady decline. Hongjiannao Lake, the largest desert freshwater lake in China, is also gradually recovering, helped not only by increased rainfall but also by the implementation of stronger environmental policies and better water and

land management practices. These environmental improvements are also improving agriculture and local economies. In northeastern provinces like Heilongjiang and Jilin, warmer temperatures and more rainfall are extending growing seasons and supporting the expansion of maize and rice production.

In the North China Plain, more rainfall and effective groundwater management have significantly reduced pressure on aquifer depletion. This process is helping farmers maintain stable production of wheat and maize, which ensures food security and increases rural household incomes.

At the same time, recovering ecosystems are creating new economic opportunities for people. Proper management of wetlands and lakes is supporting fisheries, eco-tourism and several green industries. In this way, ecological improvements are being increasingly linked with socioeconomic development.

In cities, ecological civilization is also changing how climate risks are managed. Places such as Wuhan, Hubei province and Shenzhen, Guangdong province, among others, have developed "sponge city" programs, which allow rainwater to contribute to groundwater recharge.

This means water can be used instead of causing floods and economic damage. Major infrastructure projects, including the South-North Water Transfer, are also helping to balance water resources across regions, and contributing to the country's economic development.

Recent extreme weather events have further pushed these efforts forward.

Cities have further improved monitoring systems and inter-institutional coordination, making adaptation to climate change more effective, proactive and less damaging.

However, challenges remain. More intense rainfall is putting added pressure on flood control systems and urban drainage networks that were designed for the more stable climate conditions in the past.

Adaptation is an ongoing process that requires continuous improvements. Ecological civilization offers a clear direction for this effort. It connects environmental protection with economic and social planning, helping China adapt to changing climate conditions while continuing its steady social and economic development.

By improving water and land management practices, supporting agriculture, and strengthening resilience in cities and regions, China is turning climate challenges into opportunities for more sustainable growth.

In other words, ecological civilization is not just an ideological concept but also a practical way forward in a changing climate.

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The views don't necessarily reflect those of China Daily.



OPINION

The Red-Blue Economic Divide



POTOMAC WATCH
By Kimberley A. Strassel

There's a silver lining in the clouds that produce today's political storms. It is the growing, obvious disparity between red-state and blue-state economic models, which puts their theories to a real-world test. One side is doing all the winning.

This was beautifully illustrated this week via the amusingly unequal battle between New York Mayor Zohran Mamdani and Citadel CEO Ken Griffin. Mr. Mamdani provoked it by using a malicious, personal attack to promote his pied-à-terre tax. In a

Mamdani is teaching the whole country a lesson, as his city empties of people.

video, the mayor complained that "rich" owners of second homes in his city don't pay their fair share, pointing to "this penthouse, which hedge-fund CEO Ken Griffin bought for \$238 million."

Citadel in 2022 moved its headquarters from Chicago to Miami, but it still maintains a large New York presence, which made it a daft target to pick. The hedge fund's team members have paid nearly \$2.3 billion in city and state taxes in the past five years, while Citadel is deciding whether to redevelop a Park Avenue office that would create 15,000 permanent Mid-

town Manhattan jobs.

Just how daft was made clearer by this week's response from Mr. Griffin. At a Milken Institute conference, he said that Mr. Mamdani's attack had helped clarify Citadel's future. "When we moved from Chicago, there was a debate between New York and Miami. It's unquestionably true that we made the right choice," he said. "And now what the mayor of New York has made clear to my partners, and primarily my New York partners, . . . is that we need to double down on our bet in Miami. Because we want to be in a state that embraces business, that embraces education, that embraces personal freedom and liberty, and that embraces people having an opportunity to live the American dream. And a dream of earned success, not a dream of redistributive handouts that leave people dependent on government for their lives and their livelihoods in a way that takes away dignity and honor."

Mr. Mamdani responded by insisting that New York's tax system was "unjust" and that only after further taxing "the wealthiest New Yorkers" will the "city be one that working people can actually afford to live in."

This is demonstrably untrue, as evidenced by Florida. Miami-Dade County has experienced booming growth, with "working people" flocking to chase an explosion of business, jobs and better lives. Its schools are better than New York's, its housing and rent half as expensive, its utilities more affordable. It is cleaner, isn't teeming with vagrants,



New York Mayor Zohran Mamdani

and you can even visit a Walmart. Miami residents get all this because of—not in spite of—zero state income taxes, zero estate taxes, a manageable 7% sales tax, and reasonable property taxes and corporate taxes. Those policies drive growth and revenue. New Yorkers, by contrast, stagger under tax and cost burdens. A combined state and local income tax of as much as 14.8%. A state and city sales tax of nearly 9%. Property taxes. A heavy corporate income tax. All for the joy of crummy schools, insane rent, costly utilities and a collapsing transit infrastructure. More than 100,000 people fled the city last year.

This is the divide, and it is accelerating across the country. Red states are racing each other to compete for growth-cutting taxes, slashing regulations, enacting government union reforms. South Carolina is the latest to join the flat-zero tax movement, the ninth state to do so since 2021. Texas last year implemented the largest school-choice program in the nation, joining a sweeping universal-choice

movement. Cities are vying to become finance and tech hubs.

By contrast, progressives are doubling down on taxes and redistribution. At least eight states now have a "millionaire's tax"—several created in just the past year—while at least a dozen more sprint to adopt one. Blue states are promising even bigger hand-outs, more "crack-downs" on business, greater union power, fatter cops. Even as crime rages, schools fail, and the cost of living keeps increasing.

The chasm between these two approaches is now too wide for businesses or average Americans to ignore. And it's what is providing those liberating, real-time results.

Whereas businesses once felt compelled to stay in Wall Street or Silicon Valley, the downsides have grown too huge. Whereas working folks in the past mainly relocated for weather or the occasional job switch, Americans are today moving aggressively on the basis of economic policy. They are flocking to Florida, Texas, Utah, Tennessee, Georgia, the Carolinas. They are draining out of New York, Illinois, New Mexico, Massachusetts, New Jersey, California and Hawaii. The obvious success of one model and the obvious failure of another is documented with every one-way U-Haul rental.

And it conjures in the mind a future Mamdani video. One in which the mayor is still raving about injustice—but nobody is left in New York to hear him.

Write to kim@wsj.com.

BOOKSHELF | By Nuno Castel-Branco

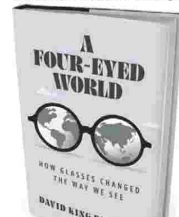
The Story Of Spectacles

A Four-Eyed World

By David King Dunaway
Bloomsbury Academic, 296 pages, \$28.95

Imagine using eyeglasses to learn more about the person across the street. In Oxford, England, where I live, tourists could use these glasses to identify Nobel Prize winners or bestselling novelists—people famous for their work but not their faces. What would we do with this information? How would people feel about being identified through such devices?

This optical revolution may become reality soon. Most smartglasses don't yet have facial-recognition capabilities, but already they can use augmented reality to answer certain questions about what we see. These glasses promise great benefits. Imagine surgeons operating while streaming live video back to a medical-school classroom; or people with Alzheimer's receiving directions to return home after a walk. Skiers could use the glasses to monitor speed, elevation or even to make phone calls.



Eyeglasses—smart or not—make the uncertainties of technology especially clear, as argued in "A Four-Eyed World," an entertaining account of how glasses change the way we see.

Written by David King Dunaway, a professor of English at the University of New Mexico, the book explains "why eyeglasses have cut such a wide swath through American and world culture."

As Mr. Dunaway points out, eyeglasses carry an ambiguity that still shapes modern society. Two-thirds of the U.S. population wears glasses, but many still avoid showing them in public, either by taking them off for photos or wearing contact lenses instead. American presidents have rarely been seen wearing glasses.

Mr. Dunaway is no optical scientist, but he is a gifted writer. "Like medicine to reduce a fever," he tells us, glasses bring relief to those with shortsightedness, "reclaiming a world" that had "slipped into obscurity." His book is an enthralling exploration of what it means to wear glasses, and "their place in popular culture." He explains why Meryl Streep's imperious magazine editor in "The Devil Wears Prada" is one of the few female characters in Hollywood to wear glasses in a favorable way. He exposes the secrets of William Bates, the ophthalmologist who convinced Igor Stravinsky and Thomas Mann to perform eye-muscle exercises rather than wear glasses.

"A Four-Eyed World" also addresses the "epidemic of myopia" among modern young adults. Children today are exposed to screens from an early age, but Mr. Dunaway reminds us, smartphones "as toys may not be a good idea." Moreover, most people need glasses today because they spend too much time indoors—a problem that has led schools to increase the time students spend outside. We can only imagine what will happen when smartglasses or lenses become widespread, offering users the opportunity to record or stream everything they see.

Despite its promises, however, "A Four-Eyed World" falls short of being a suitable history of eyeglasses. Good history books should quote from primary sources or recent scholarly works. By failing on both notes, Mr. Dunaway pays a high price. Quoting from a PBS documentary and from newspapers and popular books, "A Four-Eyed World" repeats false and outdated ideas, such as that Columbus was inspired to travel west because he thought "the world must be a sphere, rather than a flat disc." Or that Roger Bacon, an Oxford friar and one of the first to write about the optics of eyeglasses, was imprisoned for attempting to invent them.

Instead of taking seriously the innovative research on the histories of optics conducted by such scholars as Sven Dupré, Vincent Hird and David Lindberg, Mr. Dunaway advances factual mistakes, such as that St. Jerome kept a pair of glasses "by his desk," despite the fact that Jerome lived almost a millennium before glasses were invented. An image of Francis Bacon, the English lord chancellor, is mislabeled as the friar Roger Bacon.

Eyeglasses are not neutral in literary works. Shakespeare sometimes scorned them. Harry Potter's mark him as intelligent and vulnerable.

Mr. Dunaway's strengths lie where he is an expert: English literature. From him we learn that eyeglasses were not neutral in literary works. Shakespeare wrote often about them, sometimes pejoratively: "Wilt thou . . . seek for sorrow with thy spectacles?" asks the king in "Henry VI, Part 2" (1592). Jonathan Swift was more positive, using, as Mr. Dunaway tells us, "glasses as shields" against arrows in "Gulliver's Travels" (1726). By giving the boy glasses, J.K. Rowling portrayed Harry Potter as both intelligent and vulnerable.

Spectacles were also crucial to Aldous Huxley, who said he became a writer rather than a physician due to his poor vision. He presumably wrote "Brave New World" (1932) while wearing glasses, but by the time he composed "The Art of Seeing" (1942), as Mr. Dunaway tells us, Huxley had given up wearing glasses with the help of the Bates method.

Few people today could imagine a world without eyeglasses, just as they could not conceive of a world without screens, an analogy that "A Four-Eyed World" often suggests. Bravely, Mr. Dunaway steps in Huxley's shoes and lets go of eyeglasses for a week, writing passionately about the experience throughout the book. Life is harder. Books have to be within 5 inches to be read, and things have to be done more slowly. At the same time, colors become more vivid, the ears more astute. "In pursuit of perfect vision," he concludes, "I had overlooked much in the visual matrix surrounding me every day."

Mr. Castel-Branco is a historian of science at the University of Oxford and writes the *Stories of Science* newsletter on *Substack*.

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Religion and the Right to Be Left Alone

HOUSES OF WORSHIP
By Avatars Kumar

Vice President JD Vance caused an uproar when he expressed his wish that his wife, Usha, a practicing Hindu, would one day follow his spiritual path. Many in the billion-strong global Hindu community were outraged at his declared hope that Mrs. Vance would convert to Catholicism.

Different religions perceive proselytization differently. Religious conversions, normal in the Western world, have never held much place in nonproselytizing traditions. Christianity and Islam, the world's largest religions, both actively seek converts from other faiths through persuasion, education, outreach and sometimes coercion.

One visible result is that even today discussions of freedom of religion have a pro-proselytizing tint. Article 18 of the Universal Declaration of Human Rights protects the freedom of thought, conscience and religion—including the right to change one's religion or belief. The declaration doesn't specifically protect the right to retain one's faith. Nonproselytizing religions face an asymmetry, and their efforts to safeguard followers from predatory proselytization are routinely labeled violations of religious freedom and human rights. That India's anticconversion laws are criticized by international rights organizations exemplifies this asymmetry and

systemic misunderstanding. From the perspective of nonproselytizing religions, people have a right to stay in their religion and not be bothered by those who wish to convert them. There is a disconnect in human-rights discourse. The right to change religion is unqualified by its nature, but the right to try to change someone's religion can't be unqualified without interfering with and violating others' religious freedom.

This disconnect is visible in the U.S. Commission on International Religious Freedom, which has no Hindu commissioners. Conferences on freedom of religion routinely have inadequate representation of Hinduism. The United Nations' 2022 Congress of the Leaders of World and Traditional Religions had "minimal" representation, according to prominent Hindu leaders.

The root of this general dismissal of nonproselytizing religions is the dominance of Christianity and Islam. The former is known for promoting evangelism, as seen in Jesus' directive in Mark 16:15: "Go ye into all the world, and preach the gospel to every creature." Islam emphasizes *dawah*, instructing Muslims to invite people to Islam. Muslims ruled large parts of India from the early 13th to the 19th century, and during this era Muslim preachers and Sufi mystics actively proselytized for Islam. The pattern of seeking converts is manifested in the missionary work of both Christianity and Islam.

As these forms of faith came down to the present day, they tended to ignore the strain of religions that are mostly nonproselytizing—Hinduism, Buddhism, Jainism, Judaism, Taoism, Confucianism, Shinto and tribal indigenous traditions. In these nonproselytizing religions, actively seeking new converts serves no theological purpose.

Why should freedom favor proselytizing faiths over those that don't seek converts?

Some of these faiths teach that spiritual experiences transcend sectarian boundaries and aren't limited to one faith. Key Hindu beliefs illustrate this idea: Hinduism holds that many paths access one underlying Truth. The Rig Veda, Hinduism's oldest text, concisely reflects this with the aphorism "Truth is one, but the wise call it by many names."

At the heart of proselytizing religions is exclusivity. There is a belief within proselytizing traditions that their faith alone has access to spiritual experiences in this life and beyond. Such exclusivism has led to violence. Over the half-millennium following Constantine's conversion to Christianity and the Edict of Milan in 313, Christian leaders and followers actively destroyed sites and traditions of pagan-

ism as they expanded across Europe. Catherine Nixey's 2014 book, "The Darkening Age: The Christian Destruction of the Classical World," argues that this marked a turbulent and violent transformation, giving rise to what some have described as the "savagery" of Christian Europe.

Islam often spread in the Arab world and Indian subcontinent with the might of the sword. Several scholars have described the destruction of Hindu temples and deities in the Indian subcontinent.

Colonialism is closely linked to religious conversion, as British missionaries sought to convert Hindus. Many British Christians believed their religion was more advanced and enlightened than those of the people they ruled, motivating their missionary activities.

The result of all this history is the echo that still persists in the contemporary views of human-rights organizations, with their definitions of religious freedom as centered around the freedom to proselytize.

And thereby such major religions as Hinduism—the world's third-largest faith—are excluded from human-rights discourse, international bodies and religious-freedom monitoring organizations. This asymmetry needs to be addressed.

Mr. Kumar is president and trustee of the nonprofit INDICA.

until life's closing curtain, whenever it might descend.

That philosophy is a lively rejoinder to the notion of a bucket list, that neat inventory of goals and destinations that one supposedly ticks off with businesslike efficiency. Bucket-listers envision a lifetime wrap-up as smartly as a dossier before the parting bell tolls, with each page filled in, every desire fulfilled.

But maybe the best lives finish as my mother's did, without all the boxes checked. A mother's dreams, like her love, are sometimes more than any list can contain.

Mr. Heitman is a columnist for the *Baton Rouge Advocate* and editor of *Phi Kappa Phi's Forum* magazine.

The Trip My Mother Didn't Take

By Danny Heitman

Shortly before Mother's Day in 2008, my 78-year-old mother checked into the hospital for routine surgery to fix her knee. She'd booked her first trip to the Grand Canyon for the coming summer, and she wanted to walk without pain while sightseeing. But life had other plans for my dear old mom. She suffered a rare complication on the operating table and never woke up.

For a few years after my mother died, I thought about her on Mother's Day with wistful regret. It seemed unfair that she'd been preparing for a lovely Southwestern odyssey, only to have it end so badly. But over time, I came to see that I was viewing her

experience the wrong way. My mother had spent her final days in eager anticipation of pastel sunsets in desert skies. Is there any better way to close out a life than looking ahead with a smile?

There's something about the unfinished work of living.

It also occurred to me that someone as active and curious as my mother was bound to conclude her story in mid-sentence. If she had lived to see the Grand Canyon, she'd have hatched fresh schemes to see the sequoias of California, the falls of Niagara, perhaps the Great Lakes, where

my late father began his service in the Navy. There would have always been some itinerant on the calendar when my mother took her final breath.

The idea that rich lives must close with a few loose ends isn't a new one. Novelist Gill Godwin, 88, has pointed readers toward a quote attributed to filmmaker Ingmar Bergman: "An artist should always have one work between himself and death." It's a proverb Ms. Godwin has kept in mind while deep in her own work, though her time left to wrap up manuscripts isn't infinite.

New Yorker writer John McPhee, 95, calls these late-season ambitions "old-age projects," open-ended activities designed to keep one busy

OPINION

REVIEW & OUTLOOK

The Great 340B Healthcare Grift

Politicians love to hate Big Pharma even as government policies raise drug prices. A textbook example is the federal 340B drug program, which hospitals exploit to raid drug makers. Since the press missed it, we'll tell you about the spectacular opinion by a federal judge detailing how this well-intended program has become a scam on taxpayers.

Last week federal Judge Daniel Traynor blocked a North Dakota law that sought to exploit 340B to transfer hundreds of millions of dollars from drug makers to hospitals and pharmacies. But his special contribution is his opinion explaining how a program "meant to help American poor is being abused to provide a windfall to hospital conglomerates and participating pharmacies."

We've previously reported how 340B has become a cash cow for hospitals. Congress created the program in 1992 to assist hospitals serving large numbers of low-income patients. To participate in Medicare and Medicaid, drug firms are required to "offer" their products at steep discounts to such hospitals.

Discounts typically range from 20% to 50% of a drug's sticker price. "In some cases, the discount is so steep hospitals pay 'a penny per unit,'" Judge Traynor writes. Hospitals and pharmacies with which they contract dispense the drugs to patients who pay the non-discounted prices (or their insurers do). This is a sweet arbitrage for hospitals and pharmacies.

"AstraZeneca's Farxiga, for example, sells for 'hundreds of dollars' commercially but 'less than a dollar' with the 340B discount," the judge notes. Drug makers in turn raise sticker prices to make up for the discounts they are required to give hospitals. "Ultimately, it is the patients who suffer as a result," the judge writes.

340B spending has ballooned as more hospitals have become eligible owing to the Obama-Care Medicaid expansion. Now some of the wealthiest hospitals in the U.S. qualify, and there is no requirement that they use the discounts to directly help patients. Studies have found that hospitals largely use the money for financial investments and acquisitions.

Hospitals are also contracting with more pharmacies, which are paid a kickback to dispense medicines. Between 2010 and 2019, the number of contract pharmacies nationwide increased 18-fold, the judge says. Meanwhile, 340B drug purchases surged to \$81 billion in 2024 from \$6.9 billion in 2012.

Drug makers in recent years have attempted to limit the number of contract pharmacies to which they provide discounts to prevent abuse.

This has spurred litigation. The Third Circuit and the D.C. Circuit courts of appeal have held that drug makers aren't required under federal law to provide discounts to an unlimited number of pharmacies.

Enter North Dakota, which passed a law last year barring drug makers from limiting the number of pharmacies in the state that qualify for discounts. Arkansas has passed a similar law, and other states are considering it. Judge Traynor explains crisply: "Here is what is really going on: a coordinated collusion" between hospitals and pharmacies "to exploit Congress's inattention to a federal program."

"This scheme works because no one considers manufacturers as victims. Big pharma garners little sympathy," he writes, but that doesn't "mean manufacturers should be fleeced by enterprising states and hospital conglomerates that wield power in legislative lobbies." North Dakota's law "benefits hospital conglomerates, and Joe Paycheck sees no difference in the price of his meds."

The judge ruled that North Dakota's law is pre-empted by federal law since "manufacturers are forced to decide between violation of a state law or participation in a federal program with additional costs, which amount to the millions." AbbVie estimated North Dakota's law would cost it \$35 million this year alone.

Multiply that cost across the pharmaceutical industry and the U.S., and you're looking at an income transfer of tens of billions of dollars a year from drug companies and patients to hospitals and their pharmacy partners. Senate Republicans last year issued a report detailing how wealthy hospitals like the Cleveland Clinic have exploited the program.

An Empire Center for Public Policy report this spring found that 340B revenue for New York's well-endowed hospital systems has ballooned—846% for Mount Sinai between 2019 and 2024. This has driven "up drug costs for employer-sponsored health plans, including taxpayer-funded plans offered by state and local governments," the report says.

If Republicans in Congress want to reduce healthcare costs, they'll use their next budget reconciliation bill to curb this 340B abuse—say, by requiring hospitals and pharmacies to pass along the discount money to patients. This is government grift at its worst.

A federal judge shows how this hospital 'discount' fleeces drug makers and patients.

LETTERS TO THE EDITOR

Airlines and Overzealous Antitrust Enforcers

Regarding your editorial "Spirit Airlines and the Antitrust Left" (May 4): Many people think that because carriers like Spirit Airlines have lower costs, they should be able to compete with the major airlines by offering lower fares. That's a fallacy.

On any route involving a hub city of a major airline, the major airline's network will support more flights (and therefore more possible connection options) than the low-cost carrier, which relies on point-to-point traffic. This product advantage, among others, generally allows the major airlines to charge and receive higher ticket prices than the low-cost carriers.

The revenue from these premium tickets will normally cover the cost of a network carrier's flight before all the seats are sold. This means the remaining seats can be sold profitably at any price necessary to fill them. Unless travel demand is so high, or industry capacity so low, that major airlines can fill their planes at premium prices, it will generally make economic sense for them to match any price that a low-cost carrier offers if doing so is necessary to fill a seat.

The antitrust left is now blaming deregulation for Spirit's demise. But

there are far more airline flights, with more destinations served, at lower prices in real terms, than before deregulation. This is because deregulation allowed airlines to develop networks, that efficiently aggregate and distribute traffic through mergers, international alliances and organic growth.

During the era of deregulation, I was on the staff of the Civil Aeronautics Board, which regulated airline routes and prices until 1978. The architects of deregulation, Michael Levine and Alfred Kahn, didn't know what form airline competition would take. They were confident, however, that business executives, freed from regulatory constraints, would find the most effective ways to increase output and reduce price. That is what has happened, despite resistance from regulators and occasional missteps by misguided judges. Unfortunately, the Biden administration's antitrust enforcers and Judge William Young prevented Spirit Airlines and JetBlue from helping airline competition continue to evolve.

BEN HIRST
Wayzata, Minn.
Mr. Hirst is former executive vice president of Delta Air Lines.

Globalization's Overlooked Economic Benefits

In his column "What Happened to the Pragmatic Trump of the First Term?" (Editor At Large, May 5), Gerard Baker wisely decries President Trump's second-term pursuit of a misguided and extreme ideological agenda. Mr. Baker points out that antiglobalist ideas motivated voters in 2016—views that globalism "facilitated mass migration and the elevation of international capital that ravaged communities at home."

A better name for "the elevation of international capital" is "free trade." This term reveals the increased freedom of ordinary people to spend their incomes as they choose, while avoiding the mistaken suggestion that lowering trade barriers benefits only Davos-vacationing capitalists at the expense of the masses.

And where are these "ravaged communities at home" that voters were so worried about? Politicians and pundits still talk incessantly about these communities, but scholars who make serious attempts to locate them encounter difficulties. Economist Jeremy Horpedahl studied

the 10 metropolitan statistical areas in the U.S. that suffered the largest negative hits during the infamous "China Shock" of the early 2000s. According to Mr. Horpedahl, all of the metropolitan statistical areas "hit hard by the China Shock still managed to have significant and positive real wage growth across the distribution since 2001. . . . Wage gains in several of these places, in fact, are better than the national trends."

Whenever economic change occurs, some particular workers lose jobs, and some particular locations lose business and population. Economic growth requires economic change and adjustment. This has always been and will continue to be the case. But the story of America is that ordinary people recover over time and become wealthier. It's an error to single out the freer trade of the past few decades as a unique source of economic change that justifies greater skepticism of globalization.

PROF. DONALD J. BOUREAUX
George Mason University
Fairfax, Va.

Hong Kong's Spy Campaign Is Exposed

Hong Kong dissidents have long warned that the Chinese city uses its economic outposts for nefarious purposes abroad. Their vindication came this week as a British court convicted two men in a spying plot, and American lawmakers can act to prevent similar Chinese harassment in the U.S.

The Hong Kong Economic and Trade Office (HKETO) in London ostensibly exists to promote commerce. But the office organized and funded a campaign to stalk "dissidents living in the UK who were referred to by individuals linked to the Hong Kong authorities as 'cockroaches,'" the Crown Prosecution Service said in a news release Thursday.

A British jury heard that Billy Yuen, a former Hong Kong cop who worked at the London HKETO, oversaw the spying campaign. Peter Wai, a British border force officer and police constable, helped with information-gathering and surveillance.

Both men were found guilty Thursday of assisting a foreign intelligence service in violation of the U.K.'s National Security Act. Mr. Wai was also found guilty of misconduct in public office for misusing government computer systems to

search for sensitive information.

The targets of the HKETO's spying campaign included Nathan Law, Finn Lau and Christopher Mung, who sought refuge in the U.K. after fleeing Hong Kong under threat of arrest for promoting democracy. Hong Kong has placed youths of more than \$127,500 each for their capture, and Hong Kong Chief Executive John Lee, a Beijing factotum, has vowed that they'll be "pursued for life."

Other critics-in-exile face the same bounties and threats from Hong Kong authorities, including the U.S.-based Anna Kwok, Frances Hui, Joey Siu and Dennis Kwok. A trial began this week in a federal court in Brooklyn of a man accused of establishing a Chinese police station in New York City to harass and surveil exiled dissidents. Defendant Lu Jianwang has pleaded not guilty.

Despite Beijing's transnational repression, Britain this year approved a new Chinese mega-embassy in London that the Communist Party can use for malign purposes. The U.S. Congress can do better by moving forward with a bipartisan bill giving the Secretary of State authority to shut down HKETO offices in New York City, San Francisco and Washington, D.C.

The city used an economic office to stalk dissidents in the U.K.

Universities Can Get Back on the Right Road

The findings by a Yale University faculty group pinpointing the university's failings apply across the higher-education landscape ("Yale Group Urges Broad Overhaul," U.S. News, April 16).

As a leader of communications and marketing teams at universities in Texas, Arizona and Georgia, I experienced firsthand each institution's strong aspiration to build a reputation that would distinguish it from its peers and would bring it broad public recognition for making a positive impact in the world.

However, over the past several decades, administrators, faculty, governing boards and accrediting organizations pushed many universities beyond those vital activities, resulting in institutional drift, impractical academic programs and entanglements in polarizing political issues. Combined with increasing tuition costs and a gap between employer needs and college graduate skills, the unintentional consequence is that elected officials and regulators have become involved

in higher education in unprecedented ways to force change.

The way forward seems clear: To the extent that universities refocus their efforts and realign their resources to support knowledge-expanding instruction and research, impactful community and corporate partnerships, and student success, they will begin to regain public support.

To paraphrase renowned scholar and author C.S. Lewis, making progress sometimes requires an about-face to get back on the right road.

MARK B. LANE
Mills River, N.C.

The Trump Administration Has a Plutonium Blind Spot

John Bolton's assessment of the Iranian nuclear threat in "Negotiation Won't End Iran's Nuclear Threat" (op-ed, April 28) correctly identifies a critical yet frequently overlooked vulnerability: Tehran's plutonium ambitions. While the Trump administration is fixated on uranium enrichment levels, the parallel track for nuclear weapons via the Bushehr reactor presents another risk. While plutonium-based devices require a higher degree of design sophistication, it's naive to assume those technical hurdles are insurmountable. If the administration focuses on uranium while ignoring the plutonium back door, our diplomatic strategy is dangerously incomplete.

BILL STROCKS
Newport, N.C.

Race and the Tennessee Gerrymander

Republicans in Tennessee are moving to exploit the Supreme Court's ban on racial gerrymanders to redraw the state's U.S. House districts, and opponents are calling it racist. But wait: The vulnerable House Democrat is white, and therein lies a political lesson.

Tennessee's nine House districts are split 8-1 in the GOP's favor, and now Republicans want to squeeze out that lone Democrat. The map doesn't fairly represent Tennessee, but the same goes for Democrats' new 10-1 map in Virginia or 48-4 in California.

Democrats say the GOP is erasing black representation because the safe Democratic seat being dismantled is majority-black. Except the Memphis seat is held by Rep. Steve Cohen, who is white, and who told CNN that Memphis was "never a VRA [Voting Rights Act] case," but a compact district that "happened to be majority African-American."

Tennessee's 9th District is about 60% black, and it was held for decades by Harold Ford and then Harold Ford Jr., until Mr. Cohen won in 2006. While campaigning for the job, he suggested that if elected he'd join the Congressional Black Caucus. He dropped that idea after the CBC made clear he wouldn't be welcome. Over the years he has faced down primary challengers, including a former Memphis mayor who ar-

gued in 2010 that Tennessee's delegation ought to have at least one black member. He accused Mr. Cohen of "trying to act black."

Yet Mr. Cohen kept on winning. "The whole idea of people voting by race, with Barack Obama's election, is going by the wayside," he said that year. "I think Bill Clinton and Bobby Kennedy and Tom Harkin and

a lot of other folks could represent a black district." In another interview, he cited Martin Luther King Jr., saying Memphis voters would cast ballots "in a way that Dr. King will be smiling upon, voting on the content of their character and not the color of their skin."

By the way, the reverse also happens: Black politicians elected by majority-white House districts include Democratic Reps. Joe Neguse (Colo.) and Jahana Hayes (Conn.), along with Republican Reps. Byron Donalds (Fla.) and John James (Mich.). This is what racial progress looks like, and Justice Clarence Thomas has long argued that legal protection of minority-majority districts, as he put it in a 1994 opinion, served to "deepen racial divisions."

The Tennessee gerrymander is simply a GOP effort to divide a compact, populated area into multiple stringy districts for partisan gain, which is precisely what Democrats did in Virginia. It's bad for competitive elections, but it isn't racist.

Rep. Steve Cohen's long career is evidence that the motive is partisan.

New York's Climate Insanity

Regarding your editorial "Albany Demands a Climate Sacrifice" (May 1): If New York state achieves its targeted 40% reduction in CO2 emissions by 2030, it will likely be due to having driven 40% of its population to move to more sanely governed states.

KEVIN CLARK
Franklin, Tenn.

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THE WALL STREET JOURNAL



Kales and Scott

"And here we meet the dark underbelly of Capitalism."

OPINION

Ukraine Strikes Deep Inside Russia

By Jillian Kay Melchior

Russia will celebrate the anniversary of its World War II victory over Germany this weekend, but the Kremlin is anxious. Ukraine is accelerating its long-range strike campaign on Russian territory, which, in addition to causing military and economic damage, is having a psychological effect.

Unlike in years past, the Victory Day parade in Moscow won't feature heavy military equipment, the Russian Defense Ministry announced.

Such an enormous target is difficult to protect. No wonder Putin wants a cease-fire on Victory Day.

"They fear drones may buzz over Red Square," Ukrainian President Volodymyr Zelenskyy said Monday. Vladimir Putin that same day unilaterally declared a cease-fire on Victory Day, with the Russian Defense Ministry noting "threats to strike Moscow" on the holiday.

Mr. Putin is spending "more time in underground bunkers," the Financial Times reports, and he is taking other security precautions amid Kremlin concerns "over a coup d'état or an assassination attempt, specifically involving drones." The FT's

story relied heavily on anonymous sources, but the Kremlin has reason to feel vulnerable.

"At this stage of the war, Russia's air defense system is proving to be weak," says Anton Zemlianyi of the Ukrainian Security and Cooperation Center, a Kyiv-based think tank. Ukraine has attacked Russian air defenses with the goal of creating corridors where long-range weapons can break through. Russian air defenses are "concentrated around Moscow and Vladimir Putin's residences," and the Kremlin is also likely running low on some types of interceptors, Mr. Zemlianyi says.

As of May 5, Ukraine had carried out at least 13 successful attacks on targets in Russia this year, including at least 42 since April 1, according to Mr. Zemlianyi. These numbers, provided exclusively to me, are from open-source data, and each strike has been visually confirmed and geolocated, he says. The Institute for the Study of War looked at Ukrainian strikes in March and April on Russian territory at least 31 miles behind the front line and reported similar figures.

Ukraine reports tallies of all incoming Russian drones and missiles, whether or not they were intercepted. Russia's Defense Ministry publishes figures for fixed-wing drones it claims to have shot down. My analysis of both data sets suggests that in March and April Ukraine launched more long-range drones at the Russians



A Ukrainian FP-1 long-range drone in flight.

than it faced from them.

The Ukrainian defense company Fire Point's FP-1 and FP-2 drones are among those most frequently used in strikes on Russia. CEO and chief technical officer Iryna Torekh says Fire Point now delivers 220 of them a day—more than it made in all of 2023—and is on track to produce about 400 daily by the end of 2026.

Fire Point also produces Flamingo cruise missiles, which Ukraine used on May 5 to hit a facility about 900 miles away, in the Russian city of Cheboksary, that makes navigation systems for drones and missiles. And in late April the Ukrainians struck several Russian fighter jets and

bombers more than 1,000 miles beyond the border, among other strikes on military targets deep within enemy territory.

Mykhailo Podolyak, an adviser to Mr. Zelenskyy, says the Ukrainians are approaching this campaign "in a very systematic manner" and analyzing "what will be most sensitive for [the Russians], most hurtful." Mr. Putin uses energy exports to fund his war, and the U.S. has been giving the Kremlin a reprieve on oil sanctions amid the conflict in Iran. But the Ukrainians are constraining this revenue source. Reuters reported in March that at least 40% of Russian oil export capacity had been disabled

after Ukrainian drone strikes—"the most severe oil supply disruption in the modern history of Russia."

This spring Kyiv has repeatedly hit oil infrastructure and ports that are vital for Russia's energy exports via the Baltic and Black seas. Ukraine has also stepped up attacks on the Russian energy hub of Perm, more than 900 miles deep in central Russia. A series of strikes there last week burned roughly 70% of the Transneft Perm Linear Production Dispatch Station, a major pumping, storage and distribution hub for Russia to transport Siberian oil, according to the Institute for the Study of War.

Russia's size is becoming a vulnerability. "The Russians are realizing that they simply don't have enough air defenses to cover an area that huge," says Fred Kagan of the American Enterprise Institute. "They cannot be sure they can defend against Ukraine drone attacks on Victory Day"—a realization that "shocks the complacency of an elite that has been treating the war as an expeditionary operation that was not affecting the homeland."

Ukraine's long-range strike campaign has Mr. Putin asking for a cease-fire, if only for a weekend opportunity for the Kremlin. Inflicting more pain on Russia seems the most credible path to peace.

Ms. Melchior is a London-based member of the Journal's editorial board.

Keir Starmer, the Bond Market's Only Hope?

POLITICAL ECONOMY
By Joseph C. Sternberg

It's always a terrible sign when British politicians start appealing to the authority of the bond market.

That Prime Minister Keir Starmer's allies have done so this week is the clearest indication yet that his government is in trouble.

Mr. Starmer is embroiled in speculation about how long he'll hold on to his job. The proximate cause is this week's local and regional elections. Britons were still casting and counting ballots in the Thursday election as this column went to press. But the outcome is all but foregone: a historic drubbing for Mr. Starmer's Labour Party in races to control around 40% of the local governments in England and the regional parliaments in Wales and Scotland.

Labour lawmakers in the national Parliament were so certain of the bad outcome they haven't waited for the elections before accelerating

their plotting against Mr. Starmer. Rumors have swirled for weeks about challenges to his leadership of the party and the country.

The anticipated election loss exposes Mr. Starmer's failure to resolve the central political crisis confronting Labour—the loss of trust in the party among its traditional blue-collar base. Those voters are flocking to the insurgent right, anti-immigration Reform UK party of Nigel Farage. Compared with the scale of this shift, the concomitant drift of urban progressives toward the far-left Green Party is a sideshow.

The specter of a big electoral defeat makes Labour politicians more sensitive to Mr. Starmer's peccadilloes. A few weeks ago it was the scandal over his appointment of Peter Mandelson as ambassador to Washington despite concerns about whether Mr. Mandelson had passed a national-security vetting procedure.

Then there's the antisemitism crisis. A spate of attacks on Jewish sites, most recently a double stabbing attack last week in the Golders Green neighborhood of London, is exposing a persistent Islamist threat in Britain that authorities

suggest may be egged on by Iranian proxies. The danger is compounded by the disgraceful seepage of antisemitism through elements of Britain's political class, particularly on the left.

Mr. Starmer was elected as Labour leader in 2020 in large part to purge the party of the antisemitism that

Labour took a historic drubbing this week, and there's no easy solution for the party or the country.

was rife under Jeremy Corbyn's leadership and make Labour electable again. Instead, after nearly two years of Mr. Starmer's administration, Jews are less safe in Britain than they've been at any time since perhaps the Middle Ages.

Mr. Starmer talks a good game about combating this danger. In practice he appears paralyzed. Perhaps he fears being abandoned by the motley coalition of Islamic community rabble-rousers and far-left

campaigners who still sort of prop up Labour. But voters forcefully rebuffed Mr. Corbyn in 2019 in part due to antisemitism and eventually may notice Mr. Starmer's failure to get a grip.

Looming over it all is the poor state of the economy. Growth remains anemic, while inflation shows signs of ticking up amid the war in Iran. Despite periodic attempts to gain up an economic-growth agenda, Mr. Starmer hasn't been able to settle on an approach that would raise living standards and stir optimism. The failure results from a combination of Mr. Starmer's personal lack of intellectual imagination and his party's fractiousness.

Which brings us back to the bond market. Allies have started whispering to reporters that if Chancellor of the Exchequer Rachel Reeves or, by extension, Mr. Starmer himself is ousted, bond investors will take it poorly. Yields on British government bonds, known as gilts, would surge, and so would mortgage rates. The point is to warn Labour lawmakers not to provoke a repeat of the turbulence of autumn 2022, when Conservative Prime Minister Liz Truss re-

leased a tax-cutting budget that was blamed for tipping the gilt market into meltdown.

The Truss comparison is both less and more apt than Labour politicians might care to admit. It's less compelling to the extent that gilt yields now are higher than their peak during Ms. Truss's short tenure. If this is the standard, Mr. Starmer and Ms. Reeves already are failing.

The parallel is more instructive concerning the underlying dynamic. Ms. Truss spooked markets not with her relatively modest tax-cut package, as is commonly believed, but with a much larger suite of energy subsidies Britain couldn't afford. The big-spending Labour left that hopes to spend politically from Mr. Starmer's collapse might soon run right into the same market buzzsaw.

The common thread is that a high-debt, low-growth economy eventually starts running out of policy options. Mr. Starmer wants to argue that as far as bond investors are concerned, Britain's menu of viable political choices is now so short that he is the only name on it. As a political survival strategy this may even work. But it isn't the flex he thinks it is.

May 8, 1945: London Lights Up With Victory

By Si Liberman

The explosion of joy hadn't yet erupted. But there, in the heart of London, darkness was strangely absent on one street. A beam of light illuminated almost an entire block.

Some happy soul had raised a blackout shade. For the first time in nearly six years, it was done without fear of an air-raid warning's citation or German bombs.

Blackout shades were raised; people poured into the streets, shouting, dancing and embracing.

That marvelous lighted scene, foretelling the end of Europe's deadliest period, has stayed with me all these years. It was May 7, 1945. I was 20 and on a three-day pass from my air base outside Norwich, a five-hour train ride away. On an underground train en route to Piccadilly Circus, I got the picture after spotting a newspaper headline, "Unconditional Surrender Imminent," it proclaimed in thick

black letters. The lighted street seemed to confirm it.

By 3 p.m. the next day, it was official. The hostilities with Germany were over. A beaming Winston Churchill stood on the balcony of a government building and waved his usual V-for-victory sign. This time, though, it was no symbolic promise. "This is your victory," he told the crowd below.

Cheers grew into one helluva party. People poured into the streets, shouting, dancing, embracing. They mounted double-decker buses and utility poles, waved flags, lit bonfires and danced the Hokey Pokey around a statue of Queen Victoria. Sirens blared, horns honked, and church bells pealed.

In four one-syllable words, a headline expressed the mood of the country: "Our Day of Days."

I found myself drawn to Buckingham Palace, where the crowd roared and applauded when people appeared on the balcony. From where I stood, King George VI, Queen Elizabeth, their princess daughters, Elizabeth and Margaret, and Prime Minister Churchill were a distant blur. The next day newspaper pictures showed them smiling and waving at the crowd.

That night floodlights illumi-

nated Buckingham Palace and the Houses of Parliament for the first time since 1939. Big Ben's toll, signaling the official end of the war in Europe, was greeted by booming fireworks and screaming sirens.

The celebration went on for two days. Bus and train service in and out of London was halted, and thousands who had flocked to the city to participate in these historic moments jammed hotels and parks.

U.S. military personnel passes were extended for two days because of the mass-transit breakdown. That was great, except that the Red Cross servicemen's hotel and other hotels had no vacancies, and my

money had run out. I wasn't alone and joined hundreds of others, spending a damp, chilly night trying to keep warm and sleep near one of the bonfires in St. James's Park.

A thin, dark-haired girl I met also was left out in the cold—unable to return to her suburban home because trains weren't running. Her name was Doreen. She said her mother had come to London to celebrate the end of World War I and met and married a Yank.

Doreen couldn't wait for the end of rationing, especially for the day when nylon stockings would be available in England. Back in the States

several months later I mailed her three pairs of nylon stockings.

Memories of those tumultuous days will be rekindled on Friday as England solemnly observes the 81st anniversary of V-E Day. As the sole living member of a nine-member Eighth Air Force B-24 bomber crew I'll be there in spirit with my wife of nearly 77 lucky years remembering those crazy joyous days and my late fun-loving flying buddies.

When I'll lift a glass: "Till we meet again."

Mr. Liberman retired in 1989 as editor of the *Asbury Park Press's* Sunday edition.

The 'Blind Sheikh' and the Candidate

By Michael B. Mukasey

Somewhat less than boastfully, I write to share the news that a man who was a witness in my courtroom more than 30 years ago is now running for Congress. Adam Hamawy is the leading fundraiser among the 13 Democratic candidates competing to succeed retiring Rep. Bonnie Watson Coleman in New Jersey's 12th Congressional District.

Mr. Hamawy appeared before me as a defense witness when I presided at the 1995 trial of Omar Abdel Rahman, also known as the "Blind Sheikh," who was convicted of numerous offenses, including seditious conspiracy against America—providing the spiritual guidance for the first World Trade Center bombing in 1993—and conspiring to assassinate Egyptian President Hosni Mubarak.

The defense offered Mr. Hamawy's testimony to rebut a prosecution witness's testimony that, during a trip to Detroit, Abdel Rahman had urged that witness to point a rifle at Mubarak's chest and kill him. Mr. Hamawy testified he recalled no such statement, although he did recall Abdel Rahman characterizing the U.S. and Israel as "enemies of Islam" and speaking of the need for

Muslims to conduct jihad against the enemies of Islam: "Of course that's what [he] always talked about."

Mr. Hamawy was more than a casual traveling companion of Abdel Rahman. He met the Blind Sheikh in 1991 after the cleric had already been charged with providing the spiritual authority for the 1981 assassination of Mubarak's predecessor, Anwar Sadat, although an Egyptian court acquitted him of direct involvement in

Adam Hamawy was in my courtroom in 1995. Now he's running for Congress.

that crime. Mr. Hamawy attended several of Abdel Rahman's sermons, visited the cleric in his home before his trial and provided him with translation services. Mr. Hamawy began his trial testimony with the greeting "salam alaykum" addressed to the defendant.

Abdel Rahman's aspirations went beyond bombing and murder. He apparently aspired to be the Egyptian Ruhollah Khomeini, emulating the Iranian ayatollah by distributing thousands of audiotapes of his speeches

worldwide through a network of followers. That dream was cut short by his criminal conviction.

Although Abdel Rahman is no longer around to provide an endorsement of Mr. Hamawy's candidacy, having duly completed his life sentence in 2017, Mr. Hamawy has received the endorsements of Rep. Ilhan Omar (D, Minn.) and the head of the Council on American-Islamic Relations, Nihad Awad—who said after the Oct. 7, 2023, atrocities against Israel that he was "happy to see people breaking the siege and throwing down the shackles of their own land and walk free into their lands that they were not allowed to walk in." Mr. Hamawy also has the support of American Priorities, an anti-Israel super PAC funded substantially by contributors to the mayoral campaign of New York's Zohran Mamdani.

I will be interested to see what the voters of central New Jersey make of their opportunity to consider the credentials of this alumnus of my courtroom.

Mr. Mukasey served as a U.S. district judge for the Southern District of New York (1988-2006) and as U.S. attorney general (2007-09).

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The FT View



FINANCIAL TIMES

"Without fear and without favour"

ft.com/opinion

David Attenborough: nature's great communicator

At 100, his work should inspire a new generation of scientific truth-tellers

The 100th birthday today of Sir David Attenborough has triggered a deserved torrent of tributes for his role as the world's most authoritative voice on nature and the environment. He is not only the pre-eminent "national treasure" in his native UK but admired globally for the way he has deepened popular appreciation for life on Earth, while warning of its vulnerability to human activity and climate change.

The ingredients that enabled Attenborough to achieve so much over 70 years of broadcasting are so personal that we cannot expect any single individual to match his impact in future. Besides a warm yet authoritative presence and an infectious sense of curiosity in front of the camera, his earlier parallel career as a pioneering executive with

BBC television gave him a strong feeling for how to engage audiences.

Although Attenborough did not work as a scientist after his undergraduate course in natural sciences at Cambridge university, his wildlife programmes have a scientific rigour that commands respect among professional zoologists and biologists. There has been plenty of emotion in his filmmaking, exemplified by the famous encounter with a family of mountain gorillas in Rwanda in 1979, but he takes care not to let feelings override ecological facts.

Blessed with an extraordinarily long and healthy life, Attenborough had time first to build trust by communicating without an overtly political message, and then to deliver increasingly urgent warnings in his more recent series about the need to protect biodiversity from global warming and activities such as industrial-scale fishing. Others established global reputations as science communicators during the second half of the 20th century, such as the French

oceanographer Jacques Cousteau and US cosmologist Carl Sagan, but none lived long enough to match him.

On the whole, Attenborough's huge achievements in raising awareness of the glories of the natural world and the growing threats it faces have not had much demonstrable effect on policy-makers. Although his programmes on the oceans may have catalysed action against plastic pollution and bottom trawling, biodiversity loss and climate change continue to accelerate. We should not see this as a personal failure as no single individual can reverse the global forces causing ecological decline. On the contrary, things might have been even worse without Attenborough.

Media observers sometimes speculate about who might become the "next David Attenborough". In reality it is impossible to imagine anyone emerging in today's increasingly fragmented media landscape to match Attenborough, who rose to fame when there were few television channels and no internet.

An army of influencers is forming, determined to counter the rising tide of misinformation and pseudoscience

Rather than looking for an individual successor, we should replicate Attenborough's strengths in the growing numbers of science communicators who are active across the media landscape, from legacy broadcasters to platforms such as YouTube and TikTok. A new army of scientific influencers is forming, determined to counter the rising tide of misinformation and pseudoscience washing through social media, particularly on health, environment and climate. It will be in the interest of traditional scientific institutions to support these digital natives, who can often communicate better with young people.

At the same time big media organisations should be encouraged to invest in new nature and science series, which are a proven draw for viewers. The legacy of David Attenborough will not just be his own magnificent body of work but a legion of trusted successors, communicating the wonders of our world to its inhabitants.

Opinion Trade

Protectionism in times of crisis makes us all poorer

Ann Kuersten



Ngozi Okonjo-Iweala

The war in Iran has caused strains in the availability of energy, food and fertiliser, raising the question of whether the world's response will repeat the early missteps of the Covid-19 pandemic. Then, governments turned inward, imposing export bans and restrictions to secure vaccines domestically, even where capacity exceeded needs. Although such measures were later eased, the initial response left poorer countries at the back of the queue, with severe consequences.

A similar pattern followed the outbreak of war in Ukraine, which disrupted fertiliser and food markets. In the first two months of the conflict, WTO secretariat monitoring showed that members implemented 53 trade measures, nearly three-quarters of them restrictive. Export bans and

If countries try to insulate domestic markets, it can result in higher prices and greater volatility globally

curbs on key commodities — mainly food, fertilisers and fuels — tightened global supply and drove up prices; a smaller number of measures, including reductions in import duties, helped ease pressures at the margin. When countries act to insulate domestic markets, the result is often higher prices and greater volatility globally.

The response to the current Strait of Hormuz disruption appears less restrictive. That is a notable shift. WTO members have again implemented a substantial number of measures to address constraints in energy and related products, as well as fertiliser and food. Of roughly 78 measures introduced so far, just over 70 per cent facilitate trade. These include efforts to boost global supply, particularly of oil, gas and refined products, alongside the removal of certain export restrictions and the streamlining of customs procedures.

This more balanced approach suggests that lessons from earlier shocks are being absorbed. In many cases, governments have paired trade measures with policies such as fuel subsidies, tax adjustments and targeted transfers, to cushion households from inflationary pressures. Such policies can mitigate domestic impacts without unduly constraining global supply. Yet the share of restrictive measures,

at around 50 per cent, remains significant. Even when well-intentioned, these actions risk adding to price pressures and reinforcing concerns about scarcity. The shift by WTO members towards more constructive measures is encouraging, but it should not lead to complacency. Further restrictive actions risk exacerbating inflation and amplifying uncertainty.

Global supply chains have shown adaptability in the face of repeated shocks and disruptions. During the Covid-19 pandemic, attacks on Red Sea shipping and earlier disruptions in the Black Sea, value chains adjusted by finding alternative routes and suppliers. Early responses to the situation in the Strait of Hormuz suggest a similar pattern might emerge, as companies reroute shipments and diversify sourcing to maintain flows.

Trade policy should support, rather than hinder, this adjustment. But there is a deeper structural challenge, namely the concentration of critical trade flows through a narrow group of countries and maritime corridors. What once delivered efficiency can, under stress, become a source of vulnerability. Over-dependence on a narrow set of suppliers or routes leaves global markets exposed and reduces flexibility in times of crisis.

The risks extend beyond Hormuz. Other strategic chokepoints, including the Suez Canal, the Panama Canal and the strait of Gibraltar and Malacca, to name a few, underline the exposure of global supply chains to disruption. In such an interconnected system, policy choices in one region can transmit across markets, amplifying volatility far beyond the point of origin. Addressing these risks will require more forward-looking approaches to diversification and resilience in global trade.

This makes co-operation among governments, international organisations and the private sector essential. The pandemic showed that collaboration among vaccine producers, logistics companies and institutions such as the WTO, IMF, World Bank and WHO can improve transparency, ease bottlenecks and support the gradual removal of restrictions. These efforts did not eliminate pressures, but they helped stabilise markets and expand access over time.

Future shocks will require the same habits of co-ordination, including timely information-sharing, restraint in the use of trade restrictions and closer engagement with the firms that move, finance and insure global trade.

In an interconnected trading system, resilience cannot be secured through national measures alone. The alternative to co-ordinated adjustment is a cycle of restrictions that leaves all countries worse off.

The writer is director-general of the World Trade Organization

Letters

The case for mandatory allocation of pension investments

Patrick Jenkins ("Private sector pension pots are not quasi-government money", Business Insight, May 5) raises important concerns about giving ministers the power to force pension funds to invest in UK companies — the so-called mandate power. The harder question is why successive governments have felt compelled to reach for it.

For two decades, UK pension scheme returns have lagged behind peers in Australia, Canada and New Zealand, where plans have delivered superior long-term outcomes through serious allocation to private equity,

infrastructure and growth assets. UK schemes, by contrast, have anchored themselves predominantly to gilts and listed equities, with significantly lower exposure to the asset classes driving returns elsewhere. The compounding cost to British savers is significant.

A modest annual return differential, sustained over a working life, translates into materially lower retirement outcomes. This has not been the result of reckless risk-taking. It has been the consequence of an interpretation of fiduciary duty that prioritised cost minimisation and short-term safety over long-term value.

The 2023 Mansion House Compact and the more recent Mansion House Accord, a voluntary initiative where 17 major UK pension providers committed to allocating at least 10 per cent of their default DC funds to private markets by 2030, are excellent initiatives in their ambition and political signalling. They reflect a serious cross-party recognition that reform is overdue.

But the uncomfortable truth is that tangible deployment of pension capital into UK productive assets, particularly venture and growth, remains negligible. The Pension Schemes Act

exists because voluntary reform has, to date, not translated commitment into capital flow at any meaningful scale.

Mandation is undoubtedly a blunt instrument, and Jenkins is right to flag the tension with fiduciary duty. But the alternative, a continued drift in which British pensioners shoulder the cost of structural under-allocation, is no more comfortable. The challenge for the industry is to demonstrate, through action rather than rhetoric, that the reserve power need never be used.

Tim Lewsey
Chief Executive Officer, Augmentum
Fintech, London ECI, UK

Europe has other reasons for its quarrel with the US

Nadia Schadlow argues that transatlantic disagreements extend well beyond Donald Trump's personality (Opinion, April 22).

She is right about that. The arguments she advances to account for those disagreements, however, are open to serious challenge. She appears to lend credence to the thesis that what separates the US from Europe is simply a different attitude towards risk, implying that Americans have always been more willing than Europeans to take risks, which in her eyes seems preferable. This is an analysis one hears constantly in Washington. It was already being offered 20 years ago to explain US-European disagreements over environmental issues, among others.

In so doing, the author deliberately ignores the sources of European frustration with the US in the most recent Iranian crisis: the total absence of consultation despite the Europeans being parties to the Joint Comprehensive Plan of Action (JCPOA); the open contempt displayed towards those same Europeans — portrayed as incapable of coming to the aid of the US in the Gulf — when, without British leads and overflight rights granted by European countries, US military operations in Iran would quite simply be impracticable; the fact that this war is economically less risky for the US than it is for Europe; and the refusal to confront our disagreements within Nato.

Schadlow likewise refrains from noting that the dispute over Iran does not pit the US against Europe alone, but the US against nearly the entire rest of the world, with the sole exception of Israel. Finally, she carelessly avoids recalling that the Obama and Biden administrations were far closer to the European position. To be sure, the JCPOA did not resolve everything, but it did keep Iranian nuclear enrichment at a reasonable level — whereas since the unilateral US violation of the agreement, that rate has now reached 60 per cent.

Moreover, the Israeli-American intervention has produced effects contrary to those that were expected: it has strengthened the Iranian regime, preserved its asymmetric capacity to cause harm, created a new problem with the closure of the Strait of Hormuz, exposed the Gulf states to a threat that the US is proving wholly incapable of countering, and confirmed Trump's subservience to Benjamin Netanyahu's disastrous preferences.

Zaki Lalidi
Professor at Sciences Po, Paris, France;
Former Special Adviser to the High Representative of the European Union (2020-2024)



Why Russia's presence at Venice Biennale is so vexed

The dispute over the decision to allow Russia to participate in the Venice Biennale for the first time since Moscow's full-scale invasion of Ukraine in 2022 ("Brussels warns Rome over Russia's Biennale pavilion", Report, May 6) highlights a tension that Europe can no longer afford to treat as abstract: the boundary between cultural openness and material complicity.

The European Commission's warning that allowing Russia's national pavilion may breach EU sanctions is not an exercise in cultural censorship, but a question of legal and ethical coherence. If, as reported, the pavilion is ultimately state-owned and any associated costs confer indirect economic benefit, then participation risks undermining the very sanctions framework designed to respond to Russia's invasion.

Pietrograto Buttafuoco's defence of the Biennale as a space beyond "boycotts" is intellectually appealing but practically insufficient.

Cultural institutions do not operate in a vacuum; they are embedded within political and financial systems. When those systems are mobilised in response to aggression, claims of neutrality become difficult to sustain.

This is not about excluding Russian artists per se. Many have themselves suffered repression or exile.

Rather, it is about distinguishing between independent cultural expression and participation facilitated, directly or indirectly, by a state engaged in ongoing war and repression. If European-funded cultural platforms are to retain credibility, they must align not only with the language of shared values but with the legal instruments that give those values force.

Federico Forni
London SW15, UK

Pharaonic erasure had one consolation for Ramesses

Edward Luce recognises how readily the monuments to Donald Trump may be erased by future administrations ("The age of the American Pharaoh", Opinion, May 6). But the comparison is more complicated than that. Not only were some of the most notable pharaohs' names (Akhmenaten, Hatshepsut) obliterated by successors, but the greatest monument of all failed its primary purpose — ancient lovers removing the mummy and sarcophagus of Khufu, builder of the Great Pyramid of Giza. No trace remains.

Yet destruction is not the end of the story. A statue of Ramesses II may have been shattered but its subject has, paradoxically, been immortalised in one of the most celebrated poems of the English language, read by generations of schoolchildren — namely Percy Bysshe Shelley's "Ozymandias". That should be a consolation for Trump and his ambitious descendants.

Edward Tenner
Plainsboro, NJ, US

Apple's debt stance rooted in financial pragmatism

Apple's reluctance to match its rivals' aggressive, and potentially ruinous, levels of AI investment appears rooted in financial pragmatism ("The Apple juggernaut and the AI roadblock", Opinion, April 25).

Among the Big Tech companies, Apple holds the smallest cash reserves, roughly half those of Alphabet and Amazon.

At the same time, it carries one of the largest debt loads, second only to Amazon. While such borrowing is not unusual in a market enjoying dot-com-era spending, its leverage ratio (return on equity) of around 152 per cent stands out as the highest. These financial constraints may ultimately prove decisive, not so much a weakness as a discipline that could help Apple, and by extension John Ternus, when the moment inevitably comes that a rival can no longer sustain the debt accumulated in the high-stakes gamble on AI.

Zaid M Belbagi
London WC1, UK

Meta AI or FT headline writers? Take your pick

Dr Andrew Stoddart (Letters, May 6) says no machine could come up with a Brechtian pun such as your headline "The irresistible rise of authorial AI".

Maybe so, but on the same topic Meta AI produced "All's Well That Ends Well-Written: Coping with AI's quirks".

Dora Henry
Stratford-upon-Avon, Warwickshire, UK

I've learnt that university is not for everyone

The Big Read by Chris Smyth, Amy Borrett and Elizabeth Bratton ("Who profits as degrees in business proliferate?", April 25) reviews the benefit of a business degree where many assume it will boost their earning ability. When I started work, I was told "never assume anything". Higher education leaves students with staggering debt and, as the article points out, often the better the university the better paid the job — leaving those from lesser universities saddled with debt they can never repay, often resulting in a large cost to taxpayers.

At school we were told that the point of university was to train the mind to think, making your subject choice a secondary consideration. In 1961 I was fortunate to study economics at LSE where I learnt how to provide the maximum information with the least number of words. I then qualified as an accountant where I learnt accurate numbers tell a story, but not in words. I then went to work for my father, born to poor immigrants who had had to leave school at 13 but who then succeeded through intelligent, hard work and, critically, thinking outside the box — something no one teaches. Over 25 years I acquired skills education doesn't teach, which have enabled me to build up a charity that funds cutting-edge medical research where out-of-the-box thinkers transform our health.

What have 60 years in the business world taught me?

There are brilliant Oxbridge graduates whose academic training leaves them ill-equipped for the real world, and street traders whose quick minds trained at "the university of life" make major contributions to society. I have trained many young people, starting with intelligent 16- to 18-year-old school leavers from comprehensive schools, willing to work and learn, who without a university degree achieved considerable success.

Some will greatly benefit from a university education but, taking account of the enormous debt this imposes, many would do better not going to university.

Instead they should find an apprenticeship such as that offered by Steve Twellright, the people and quality director at Capula, the Staffordshire electrical engineering business whom you quote.

Young people need good advice and if this were available it might create a win/win — a better early decision, freedom from massive debt and an alternative way to learn, to create the foundation of a successful career.

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Opinion

Tariffs and troop cuts could hurt the US more than Europe

WORLD AFFAIRS

Constanze Stelzenmüller



A distinctive trait of the narcissistic personality is a hypersensitive, 24/7 and 360-degree radar for insults. And then there are those who slam into that radar like a heat-seeking missile. I refer, of course, to US President Donald Trump and German Chancellor Friedrich Merz. The gossamer-skinned US president is embroiled in a disastrous war with Iran from which he is desperate to deflect. The German chancellor – never much inclined to weigh his words, and distracted by a floundering coalition – last week told a school class that Tehran was “humiliating” the US.

Now President Trump says he will slap 25 per cent tariffs on European auto imports, withdraw 5,000 US troops

from Germany and scrap a planned deployment of long-range missiles. Will it happen – and would it be bad? It depends.

The tariffs would disproportionately harm export-dependent Germany. According to the Kiel Institute, an economic think-tank, they could cost the German economy €15bn in the short run and up to €50bn in the long term.

Yet new tariffs would also drive up costs for US industry and consumers, in an economy already buffeted by the Iran war. The EU could also retaliate with counter-tariffs. It could escalate by blocking US imports via the Anti-Coercion Instrument – which the Commission has so far refrained from using because of fears that the Trump administration might hit back by renegeing on its security commitments to Europe. That logic, it seems, no longer applies.

As for the soldiers, the Pentagon says it is withdrawing a combat brigade that was sent to Germany as part of a troop surge following Russia's full-scale invasion of Ukraine in 2022. That would still leave roughly 30,000 US troops in Germany (of about 68,000 US troops).

Trump is threatening that troop cuts will go “a lot further”. However, that could harm America's interests more than Europe's. US bases in Europe are essential to US force projection in Africa, Central Asia, and the Middle East. A large-scale US withdrawal from the continent – the mantra of Washington isolationists – would be a spectacular own goal, contributing to what schol-

The EU has to move far more swiftly to achieve autonomy in a far greater range of capabilities

ars Henry Farrell and Abe Newman have memorably called the “enshittification of American power”.

The Pentagon's cancellation of a 2024 deal between Trump and Merz's predecessors to station a battalion armed with long-range missile systems (Typhoon launchers, Tomahawk cruise missiles, and the not yet fully field-tested Dark Eagle hypersonic missiles) in Germany

this year is far more problematic. Its purpose was to help Europe close a crucial conventional deterrence gap after Russia stationed nuclear-capable Iskander missiles in Kaliningrad in 2018. The influential German podcast “Machtwechsel” recalled this week just how much courage this required from the Social Democrat Olaf Scholz, whose party ousted his predecessor Helmut Schmidt over a similar decision in 1982.

Ukraine's strikes on key Russian military installations prove the importance of these weapons systems; Germany's first-ever military strategy, published in April, emphasises the need for such ground-launched deep precision strike capabilities. Unfortunately, European efforts to produce indigenous systems have not yet taken off.

Last summer, European leaders flew to Washington following the disastrous US-Russian summit in Alaska, and persuaded Trump – or so they thought – to accept a kind of bridging arrangement: the US would continue to provide Europe with a nuclear umbrella and key strategic enablers such as satellite and long-range missiles. In return, Europe

would buy US weaponry to give to Ukraine, and focus on building up its conventional defence.

Less than a year later, Trump's Iranian entanglement – with its depletion of US missile stocks – has upended that bargain. Meanwhile, the Pentagon's experienced director of Nato policy has just been reassigned – seemingly because he is not aligned with the White House's jaded view of the alliance.

Europe must move far more swiftly to achieve autonomy in a far greater range of capabilities. To that end, a group of German security and defence industry experts has just published a “roadmap for overcoming critical dependencies”. They assess that substantial progress towards defence autonomy can be made in 3-5 years, at a total cost of €500bn over the coming decade – substantially less than the €750bn the EU spent to help Europe's economy recover from the pandemic. Faced with Russia waging war in Europe, and now a deeply unreliable America, there is no time to lose.

The writer directs the Center on the US and Europe at the Brookings Institution

Regulation must end Polymarket anonymity

Rajiv Sethi

It is impossible to open a bank or brokerage account in the US without going through a process of identity verification. The same is true for regulated prediction markets such as Kalshi. Yet on Polymarket's main crypto-based exchange, the real-world identities of millions of account holders are invisible.

The protection of anonymity allows for multiple accounts to be operated by a single individual or entity and makes it easier to disguise certain practices that are prohibited by law – including trading on classified information. Manipulative trading practices that are banned on regulated exchanges also become easier to implement.

So far, the attention has focused on insider trading. Last month, an American soldier involved in the capture of Nicolás Maduro was arrested after allegedly making over \$400,000 in bets on the timing of Maduro's removal from power. The soldier's attempts to conceal his identity were clumsy – a personal email was linked to his account. He has denied the charges he faces. A more sophisticated actor, using the chain-hopping, mixer services and layered wallet structures described in the US Treasury's 2026 money laundering risk assessment would be hard to identify.

The presence of potential insiders changes the incentives faced by other traders. Looking for unusual directional bets becomes a challenge. Tools like “Insider Finder” have been developed for precisely this purpose. If insiders can be identified, mimicking their behaviour can be profitable. So can

Protection of real-world identities makes it easier to disguise practices that are prohibited by law

trading in a manner that leads others to believe you are an insider and opt to copy your trades.

Anonymity also enables wash trading. This is a form of volume manipulation involving transactions by clusters of colluding counterparties. I have been working with colleagues at Columbia University to develop a procedure for identifying it and we estimate that wash trading accounted for 60 per cent of total trading volume at Polymarket in December 2024. Polymarket said that it was reviewing the study. The recent imposition of trading fees is likely to reduce this, but in the absence of identity verification, the capacity to manipulate volume by operating multiple wallets remains in place.

Polymarket has a US subsidiary but its main prediction market was exited in 2022. It is seeking approval from regulators to reverse that ban and formally re-enter the US. Although the ban has been easy to circumvent by traders with VPNs, its removal will probably attract new users to the exchange.

Approval should therefore be conditioned on some form of identity verification. The Genius Act imposed know-your-customer (KYC) compliance on issuers of payment stablecoins last year. Regulators should apply the same logic to crypto-based prediction markets.

There are three approaches to this. The most direct is KYC compliance on the platform itself. Another option is to require that crypto transfers in and out pass through approved issuers who are KYC compliant. This would allow suspicious activity, once identified, to be easily traced.

A third option, recently proposed by a Stanford-led team of academics, involves privacy-preserving digital certificates. These are credentials issued by authorised service providers that confirm a user's identity has been verified, without revealing it to the platform. Uncovering identities would require a court order.

Online prediction markets have been around for almost four decades but have dramatically increased in popularity over the past couple of years. They can serve an important function by aggregating dispersed information and leveraging the wisdom of crowds. But their promise will not be fully realised without building trust. That means weeding out insiders and manipulators and knowing exactly who is trading on the platform.

The writer is professor of economics at Bernard College, Columbia University

Why I don't write about the Lib Dems

BRITAIN

Robert Shrimley



Of all the emails and comments I get, this question is perhaps the most common. And I am not alone in hearing this complaint, which will seem particularly valid if the Liberal Democrats have a good night in yesterday's local and devolved elections. But the matter goes beyond perceived journalistic failings to the nature of politics. It speaks to the strategic dilemma facing Britain's third party.

In the fractured landscape of British politics where those we still call the “main” parties are facing existential challenges, the Lib Dems find themselves crowded out of the national conversation by two noisier but also more sharply defined new rivals in Reform UK and the Greens, both of whom are riding high in the polls. And journalism is drawn to the new and noisy, to dramatic trends rather than what one Lib Dem peer calls the “tortoise” trundling slowly forward.

The Lib Dems do have reason to grumble. Their parliamentary group is the largest in the party's history and bigger than anything seen by its fore-runners for 100 years. In local elections they are making gains. Counting from

this week's elections will continue well into today but this should be another year of gains. The current trajectory could soon see them having the second most councillors in the UK. Yet any success this week is almost certain to be submerged below other more newsworthy results, not least Green and Reform success.

But this is the ocean political parties sail on. A captain needs to master the conditions, not complain about the sea.

This then leaves a strategic question for the Lib Dems: whether they are happy as that centre-ish, leftish tortoise, quietly moving forward, or whether they want to be garnering attention, creating energy and leading debate.

Ed Davey's strategy is the former. The Lib Dems are not really trying to make the political weather. The party has enjoyed success by making itself a small target for attack, a study in reassuring reasonableness, cleverly picking areas where they can win and avoiding contentious positions which might alienate potential voters.

A recent election broadcast saw Davey standing on a church roof and declaring that, yes, his was the party that fixed things. The message is “we may be dull but we get things done”. Josh Babarinde, an MP and the party president, cites the campaign over water companies dumping sewage in rivers as proof of a wider belief in standing up for people against corporate interests. The issue certainly matters but this still feels tactical rather than strategic.

Politics is a battle of ideas and the Lib

Dems are not taking advantage of the moment. Instead, they look like part of the status quo. Davey seeks cut-through in stunts for the cameras. He does not make best use of his MPs. His able deputy Daisy Cooper is woefully out of place on the Treasury beat, for instance. And protest voters now have other outlets. In Reform and the Greens they see parties more impatient for change, with confident leaders and clear critiques of the country's ills.

Moderation and reason are attractive, especially against polarising populism. Lib Dems say they are getting local traction as a safe alternative to Reform. Even so, the centre ground is crowded and shrinking, and the party is struggling to secure attention partly because it offers no clarity as voters ask: what

They are being crowded out of the conversation by two noisier, more sharply defined new rivals

is the problem to which it is the answer?

The party has tended to prosper from leading on a big national issue such as opposing the Iraq war. So if it did want to take a strong stand, what issue could it choose? The obvious option today is rejoining the EU. Former leader Nick Clegg argued earlier this month for a more urgent and ambitious pivot towards full reunification, saying that the rise of Trump and the associated economic and geopolitical challenges have “gifted a moment of strategic clarity”. Such a policy would give definition to the party, appeal to progressive voters, and energise those newer MPs who were drawn into politics by opposing Brexit.

In fact, party policy is for a slow four-stage process eventually leading to rejoining the single market, with a “longer-term objective” of regaining full EU membership. Davey, though, stresses only a return to the customs union. This nervy approach means his party will soon be in danger of sounding less pro-European than Labour.

There are good reasons for caution. Nearly 30 of the party's 72 seats voted

Leave. For all the supposed voter regret over Brexit, there is little appetite to relive those battles and a hard fight is ahead over free movement of people.

Even so it should be possible to sound more enthusiastic about party policy. As Nigel Farage's long march shows, you cannot simply wait for the tide to turn your way; you must also make the argument. That is, after all, what politics is meant to be about.

The final reason for more boldness is that the Lib Dems remain at the mercy of bigger forces. General election success has relied on voters being happy to see a Labour government. If the tide changes, it could wash away many gains.

So do they bet on the tortoise or the hare? Do they stick to a strategy that is still working electorally or take a riskier approach, more in tune with the new politics, in a bid to shape the debate? There are arguments either way but if they choose the former the party must get used to the conversation carrying on without them.

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TECHNOLOGY

John Thornhill



in downtown San Francisco – and 10 other US cities nowadays – you can easily hail a driverless Waymo taxi on your smartphone. For a first-time passenger, they say, it typically takes about two minutes to transition from astonishment to boredom. Watching the steering wheel spinning around without a human driver initially seems like magic. It quickly becomes passé.

Much the same experience can be had in Wuhan and more than 20 other Chinese cities, where you can jump into one of Baidu's Apollo Go robotaxis. Riders in London will soon be able to compare the rival US and Chinese services when both pilot autonomous cars in the twisty British capital later this year. The London-based start-up Wayve is also planning to

run its own driverless car tests in partnership with Uber.

Yet history shows that companies with the best tech do not automatically win; those that can deploy nearly-as-good technology at speed, scale and competitive cost most often prevail. One of the challenges in deploying AI in the physical world has been its “jagged intelligence”, as the technologist Andrej Karpathy calls it. AIs can excel at some reasoning tasks and fail at others. But just as important for autonomous cars will be dealing with “jagged adoption”.

A report from the Special Competitive Studies Project (SCSP) argues that US companies still enjoy a commanding lead in the innovation game, but their Chinese rivals are speeding ahead in the deployment race. While US researchers have overcome many of the reliability and safety issues associated with AI's jagged intelligence, Chinese operators are fast smoothing jagged adoption.

China's advantages are industrial, regulatory and human, the report suggests. The country's dominant manufacturers make 90 per cent of some of the industry's most critical components, such as

lidar laser sensing systems, offering huge economies of scale. The cost of a robotaxi in China is about \$40,000. In the US, it is between \$130,000 and \$200,000.

A simpler regulatory regime in China has also eased the robotaxi rollout, enabling more data to be harvested to improve AI technology. In the US, 31 states have adopted autonomous vehicle rules, creating a patchwork of regu-

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lations that make compliance harder.

The Chinese education system has rapidly adapted to the demands of the emerging industry, training a steady stream of specialised robotics engineers. The “human cloud” of maintenance workers and customer support staff that underpins the industry is cheaper to manage in China.

A different risk appetite and varying degrees of individualism is evident in the two countries, too. Whereas only 35 per cent of Americans say they would ride in a driverless car, 60 per cent of Chinese consumers would do so. Nevertheless, China recently suspended new licences for autonomous cars following an outage of more than 100 Apollo Go robotaxis in Wuhan in March. And local taxi drivers have been protesting against driverless competitors, which may further slow deployment.

In the US, Waymo has long stressed the urgency of safety. There is a moral, as well as a business, case for developing the technology, the Alphabet-owned company argues. More than 120 people die in car crashes in the US every day. It is time to stop regarding autonomous driving “like a tech moonshot and start treating it like a public health intervention”, Jonathan Slotkin, a neurosurgeon, wrote in The New York Times.

To date, Waymo's safety record has been impressive compared with other operators such as Tesla. Waymo's robotaxis have collectively driven more than 200m miles, causing no deaths.

But such data should be treated with caution. Those driving miles have mostly been in sunnier cities at slower speeds on pre-mapped roads. Comparatively small data sets can also be swayed by singular tragic events. Concorde was the “safest” commercial aeroplane for 24 years. Then it became statistically the “most dangerous” overnight following its first catastrophic crash in 2000.

As the SCSP suggests, governments around the world should do more to set national – or ideally international – rules that could smooth the adoption of driverless cars. They can also impose higher transparency standards and enforce rigorous testing and security procedures to increase public trust.

The driverless car industry may not necessarily become a winner-takes-all market in any case. Several operators, with different technologies and business models, may yet thrive. Consumers in different markets might make different trade-offs between convenience, price and perceived safety. Londoners will soon have their say.

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