Tech denial should drive India's AI self-reliance

INDIA has faced technology denial yet again. With restrictions on access to frontier AI models such as Anthropic Claude's Fable 5 and Mythos 5 for foreign nationals, India has effectively been shut out of some of the world's most promising AI systems.

Ironically, these restrictions were imposed by the US administration within 15 days of India's induction into Project Glasswing. The initiative, led by Anthropic, gives select organisations and countries controlled access to the Mythos model to identify cybersecurity vulnerabilities and help strengthen its safety. With access to Mythos 5 now restricted, the future of India's participation in the programme remains uncertain.

The implications extend beyond research. India is one of the world's largest global delivery centres for technology services. The country's $290-billion IT industry comprises global IT services firms and around 2,100 Global Capability Centres (GCCs). Restrictions on access to frontier AI models directly affect the Indian IT industry and India's position as a preferred technology delivery hub. If a client requires work powered by Fable 5 or Mythos 5, that work will have to be executed outside India because Indian technology professionals and companies will not have access to these models. In that sense, this is technology denial in its truest form.

However, this is hardly new for India. In nearly 75 years of independence, the country has rarely been handed advanced technologies on a platter. Except for a few partners such as Russia, India has often faced restrictions on access to cutting-edge technologies from developed nations. Although globalisation over the past three decades has eased some barriers, technology transfers have remained selective and strategic. History shows that India has often turned such setbacks into opportunities. When ISRO was denied cryogenic engine technology in the 1990s following US intervention, it embarked on the difficult task of developing the technology indigenously. Years later, that effort enabled India to launch heavy satellites on its own and cement its position among the world's leading space powers.

Similarly, the Defence Research and Development Organisation (DRDO) encountered repeated technology denials during the development of its missile programme. Working with institutions such as the Indian Institute of Science (IISc) and public sector enterprises like BEL, DRDO overcame these challenges and helped transform India into a globally recognised missile technology power.

India has also demonstrated its ability to build world-class digital public infrastructure. The success of the Unified Payments Interface (UPI) is proof of the country's capability to create scalable, secure and globally admired digital platforms.

Viewed in this context, the latest restrictions on access to frontier AI models should be seen not merely as a setback but as an opportunity. India should use this moment to accelerate the development of indigenous AI models and strengthen its digital sovereignty. After all, the rapid progress of AI in the United States has been driven in no small measure by the contributions of Indian engineers, researchers and entrepreneurs. Indian technology professionals are among the world's best in artificial intelligence and machine learning. The country possesses the talent, research ecosystem and entrepreneurial capability needed to build sovereign AI models. Rather than remaining a consumer of technologies developed elsewhere, India should aspire to become one of the world's leading creators of frontier AI.

Opposition's credibility crisis: When words and actions refuse to match

Voters can forgive ideological shifts, but they rarely forgive contradictions that appear driven by political convenience

BOLD talk
V RAMU SARMA

As opposition leaders attack Donald Trump, Gautam Adani and alleged crony capitalism from national platforms, their own state governments often embrace the same figures and investments. These contradictions raise uncomfortable questions about political credibility, ideological consistency and whether the opposition can present a coherent, convincing alternative to voters

INDIAN politics has never been free of contradictions. Every political party, at one point or another, has said one thing and done another. But what is increasingly hurting the opposition today is not merely inconsistency; it is the growing gap between its rhetoric and its actions. That gap has become so visible that voters are beginning to question whether the opposition truly stands for the principles it publicly advocates.

Consider the recent examples that have generated political debate. On one hand, Rahul Gandhi has often positioned himself as a critic of aggressive nationalism and strongman politics globally, even describing Donald Trump in critical terms. Yet in Telangana, the government led by A. Revanth Reddy chose to name a road after Trump. Whether the decision was diplomatic, symbolic, or aimed at inviting investments or strengthening international ties is a separate matter. In fact it is not that easy to lure Trump administration to invest here. He is a shrewd businessman and already had investments in real estate in India. He cannot be pleased by naming a road after him. But the main political question is simple: if Trump represents values that Congress leaders oppose, why celebrate him through a public honour?

Similarly, the opposition's stance on industrialist Gautam Adani has become a subject of public scrutiny. Congress leaders, including Rahul Gandhi, have repeatedly accused the Modi government of favouring Adani and have often portrayed him as the principal beneficiary of government policies. Senior Congress leader Ashok Gehlot has also been sharply critical of the Adani Group. Yet he as chief minister met Adani and called him as Adani bhai.

In Kerala, the government led by Pinarayi Vijayan has worked with Adani-linked projects, particularly in infrastructure and ports. The Left has argued that investment is necessary for economic growth and employment generation. Its defence is straightforward: investment can be welcomed while ensuring that no company is allowed to engage in wrongdoing.

That may be a reasonable administrative argument. Governments require private investment. States compete aggressively for capital, jobs, and infrastructure projects. Political leaders know that economic growth cannot be sustained without significant private-sector participation.

However, the problem arises when the same leaders simultaneously describe a businessman as the symbol of crony capitalism and then actively seek his investments. If Adani is indeed the embodiment of everything wrong with the current economic model, why invite him? If his investments are welcome because they create jobs and infrastructure, then the portrayal of him as uniquely problematic becomes difficult to sustain.

The same contradiction can be seen in Telangana. While Congress leaders at the national level continue attacking Adani, the Telangana government has enthusiastically courted investment from the Adani Group. Again, there is nothing unusual about a state government seeking investment. What is unusual is the absence of consistency between national rhetoric and state-level governance.

This inconsistency points to a deeper challenge confronting the opposition. It has become increasingly easier to identify what many opposition leaders oppose than what they actually support. Their criticism of the ruling establishment is often sharp and relentless, but voters also expect a coherent alternative framework.

The opposition frequently attacks corporate concentration, yet welcomes large corporate investments when governing states. It criticises centralisation of power, yet many regional parties remain highly centralised around individual leaders or families. It speaks of internal democracy, but leadership transitions in several parties continue to be determined by dynastic considerations rather than organisational elections.

Such contradictions are not unique to the opposition. The ruling party too has faced accusations of inconsistency on various issues. But the difference is that the ruling establishment currently controls the political narrative because it presents a clearer and more consistent message. Voters may agree or disagree with that message, but they generally understand what it stands for.

The opposition's communication problem becomes even more evident in the statements made by Rahul Gandhi. Following the 2024 general election, he repeatedly suggested that the opposition had achieved a moral or political victory despite not securing power. He has also spoken optimistically about the future, projecting confidence about 2029. There is a political logic behind such statements. Leaders often seek to boost the morale of party workers after an election. Congress undoubtedly improved its parliamentary tally in 2024 compared with its previous performance, and the opposition alliance demonstrated that the ruling party could be challenged electorally.

However, political messaging must eventually align with public perception. In a parliamentary democracy, winning generally means forming the government. When a leader claims victory without actually obtaining power, the message can appear confusing to ordinary voters. Supporters may interpret it as confidence and momentum. Critics may view it as an inability to acknowledge electoral reality.

The larger issue is credibility. Modern voters are far more informed than before. They observe speeches, government decisions, policy announcements, and political alliances in real time. They quickly notice when leaders attack a corporate house nationally while welcoming it locally. They notice when ideological positions shift according to political convenience.

For the opposition, therefore, the challenge is not merely defeating the ruling party. It is establishing a coherent political identity that voters can trust. A successful opposition must offer more than criticism. It must provide consistency between principle and practice.

If private investment is essential, say so clearly. If engagement with large corporate groups is necessary for development, explain the safeguards rather than demonising the investors. If international leaders are to be honoured for diplomatic reasons, articulate that rationale regardless of partisan preferences.

Politics inevitably involves compromise. Governance requires pragmatism. But when pragmatism repeatedly contradicts rhetoric, credibility suffers.

The opposition's real battle today is not only against the ruling alliance. It is against the perception that it speaks in one voice during campaigns and governs in another when in power. Until that gap narrows, questions about hypocrisy will continue to overshadow its political message and weaken its ability to present itself as a convincing national alternative.

(The author is a former Chief Editor at The Hans India)

Wall Street bets on power utilities as AI demand reshapes sector

How AI infra is redrawing the economics of the electricity business in the US

CONOR HARRISON

A corporate merger that would form the largest electric utility in the United States is underway. It's just one of many recent utility mergers and acquisitions as electric utilities enter a period of rapid growth. On May 18, 2026, NextEra Energy announced it would buy Dominion Energy for USD 66.8 billion.

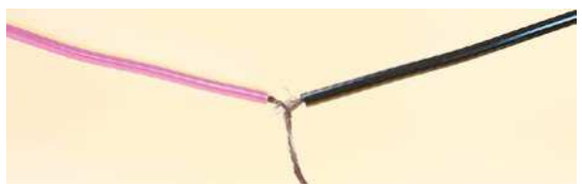
What's driving this deal and others like it is not an increase in residential electricity demand. Rather, it's based on rising demand for power to data centres for artificial intelligence systems and a desire to increase corporate profits.

As a scholar of the electricity industry, I seek to understand how and why the electricity grid and the companies that run it are changing. In my book "Brokers of Power" I explain that a primary force in the industry is not the desire to improve service for the rate-paying public, nor even for industries that want to use more electricity. Rather, stock market investors and Wall Street businesses are changing how electric utilities make money in the US.

A variety of electricity suppliers

In every state, the majority of companies that distribute and deliver electricity to homes and businesses over the wires are regulated monopolies with specific geographic service areas. But where that electricity comes from varies widely.

Many cities, some quite large, get their power from a municipally owned utility. Many rural areas get theirs from membership cooperatives. These organisations are



non-profits whose general goals are to serve their customers with reliable, affordable power. However, around 70 per cent of US households get their electricity from private companies. Most are controlled by large holding companies, such as NextEra Energy, which customers know through subsidiaries such as Florida Power and Light and Dominion Energy, which operates local subsidiaries in Virginia, North Carolina, South Carolina and Utah. These companies' main goal is to make money for their shareholders.

Regulated and unregulated markets

How a for-profit electric utility company makes money depends on where it operates.

In 28 states, electricity markets are traditionally regulated, meaning that the utility is a monopoly that owns everything it needs to make electricity -- from the generators, wires and poles to the meter on the side of your house. Customers in these states cannot choose their provider, but the prices they pay are set by a state regulator based on negotiations with the company. Those prices are set so the utility can earn a profit on the money it spends improving the electricity system -- a margin that is generally around 10 per cent.

The other 22 states are considered deregulated markets, in which profits are not capped, but neither are potential losses. In those markets, companies that own power plants compete to sell electricity on a wholesale market. In 14 states, a middleman company buys the power and competes to find customers, in effect providing households with a choice of electricity providers. In the rest, distribution companies buy the power from wholesalers and deliver it to their customers.

Since states began electricity deregulation in the late 1990s, utilities that historically operated in a single state have expanded to other states, both with and without regulated markets. The result is holding companies with complicated corporate structures and various ways of earning profits. In my research, I have found that investors prefer utilities that have mastered four overlapping ways of making money.

Monopoly operations

First, utilities need to operate successfully in monopoly territories. In general, utility companies in monopoly markets aren't allowed to make any profit on just selling electricity. Rather, their profits depend on their investments in the infrastructure to generate and distribute electricity. For example, if a company builds a USD 100 million power plant expected to last 30 years, utilities can add that cost plus an additional USD 10 million -- their 10 per cent profit -- to customer bills over the next three decades.

Utilities therefore have a financial incentive to predict that electricity demand will rise much faster than it actually does. They can use those predictions to justify overspending on new equipment, such as wires, transformers and substations, to handle those future loads. The ratepayers pick up the tab, and the company makes its 10 per cent profit, even if the new equipment ends up being unnecessary. For investors, monopoly utilities are not typically considered growth stocks, but they deliver reliable profits and returns for investors.

Deregulated markets

Wall Street also likes utilities that can succeed in deregulated markets, in which utilities are allowed to earn profits if they can generate electricity cheaply and sell it at high prices. In reality, utilities see periods of rapid demand growth and resulting high electricity prices, followed by the collapse of both.

This volatility is attractive to investors who are comfortable with risk, such as private equity firms, which use borrowed money to buy shares in companies. As states such as California began deregulating in the late 1990s, many utilities saw the opportunity to make more money by trying to time the sale of electricity to maximise revenue, as well as timing the purchase and sale of power plants themselves in order to stay ahead of changes in the market that either raise or lower electricity prices. Most companies that tried this approach failed.

(The writer is an Associate Professor of Geography, University of South Carolina, United States)

Marine protection must go beyond drawing lines on maps

Researchers say conservation success should be measured by outcomes

KIRSTEN GRORUD-COLVERT

THE ocean is home to some of the richest biodiversity on Earth. From coral reefs and mangrove forests to the deep sea, marine ecosystems sustain countless species, support coastal communities, regulate the climate and underpin global food security.

But these systems face growing pressure from overfishing, habitat loss, pollution and climate change.

In response, nations have adopted an ambitious global goal to conserve at least 30 per cent of the world's ocean by 2030 – known as 30x30. This target has expanded marine protection worldwide, particularly through marine protected areas. But what happens after protection is announced?

Decades of experience have shown that effective marine protection requires consistent rules, regulations and oversight, along with financing and meaningful collaboration with local governments, industries and communities. Without it, these areas risk becoming paper parks: lines on a map without real-world impact, where marine life may continue to face overfishing and other threats.

Two new reports we led, one from Oregon State University and the other from the Smithsonian Tropical Research Institute, offer an important reality check on where marine conservation stands today and what must be done to achieve the goal of protecting 30 per cent of the ocean.

Together, they argue that the primary barrier to realising the 30x30 ocean conservation goal is no longer ambition to protect the ocean, but effective action that can make it real.

A decade of commitments

The 30x30 goal is often promoted at global ocean meetings, including the 11th Our Ocean Conference, being held in Kenya on June 16-18, 2026.

According to the Oregon State analysis, the conservation commitments announced at past Our Ocean Conferences have helped establish more than 3.88 million square miles (10 million square kilometres) of marine protected areas, or about 2.8 per cent of the global ocean.

In all, marine protected areas now cover nearly 10 per cent of the global ocean. But only about 3.5 per cent of that is fully or highly protected.

The reach of protected areas shows that voluntary pledges can translate into tangible conservation gains when progress is consistently tracked and publicly reported. However, the findings also point to a key challenge: the growing difference between the extent of protection and its effectiveness. In other words, ocean protection cannot be judged by area alone.

The implementation gap

The Smithsonian report takes a closer look at what is needed to turn such commitments into effective conservation. Since the Kunming-Montreal Global Biodiversity Framework was approved in 2022, with almost every country agreeing to protect at least 30 per cent of Earth's land and waters, marine protection has expanded considerably.

However, global numbers show that at least half of existing marine protected areas remain unimplemented or inoperable, with rules and regulations not in place or even allowing destructive activities like bottom trawling.

Achieving the 30x30 goal still requires protecting an additional 20 per cent of the ocean over the next four years. The challenge is twofold: expanding coverage while also ensuring that the areas are actually benefiting marine life and people.

Effective, long-lasting conservation depends on management plans, trained personnel, monitoring systems, enforcement capacity, sustainable financing and community participation. Without these elements, legal designation alone does not lead to biodiversity protection, thriving ecosystems and benefits to people.

Yet, across regions, the Smithsonian report found a troubling pattern: Countries' ambition to create protected areas is outpacing their capacity to help those areas succeed. We found two key constraints: lack of coordination around capacity development – the strengthening of skills and tools needed to effectively achieve a goal – and applying a one-size-fits-all approach to distinctly different regional contexts.

Many countries and communities are committed to marine protection, but they often need better continuous governance and policy, stakeholder engagement and inclusion, data and technology, socio-ecological integration, and communication for effective implementation of marine protected areas over time.

Similarly, securing funding for marine conservation remains a persistent challenge. When we spoke with groups and communities involved in marine conservation, they often cited complex application processes and funding structures that often do not match their local realities or priorities. This creates a mismatch between how conservation is funded and how it is implemented.

There are efforts to close this gap. The Bali-based Coral Triangle Centre's Coral Triangle Initiative on Coral Reefs, Fisheries and Food Security Capacity Building Roadmap works to conserve ocean areas in a region that harbours the richest marine biodiversity on the planet.

Through regional training hubs, leadership programs, internships and digital platforms, it has trained over 8,200 government officials, community leaders and private-sector representatives in science-based marine conservation practices.

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