POLITICAL WRITING SAMPLES

Five pieces on governance and strategy

Mumbai, Maharashtra, and India in a divided world

Aditya Totade · Mumbai · 25 October 2026

1. Mumbai Does Not Need More Civic Spectacle. It Needs a BMC That Can Be Measured.

Three episodes in three weeks show a corporation that announces, reverses and fines. What is missing is a way for anyone to check how it is doing.

2. Maharashtra's Biggest Political Question Is Not Who Wins the Next Contest. It Is Whether the State Can Deliver.

Five council seats are absorbing both alliances. Meanwhile, 265 talukas are in drought.

3. Strategic Autonomy Is Becoming More Expensive for India. That Is Exactly Why It Matters.

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4. Drought, an Exam Leak and Protest Policing: Maharashtra's Three Tests Come Down to Trust

What the government, the opposition, the people affected and the officials in between have each said and done, as of 17 October 2026.

5. Five Outside Pressures Reach India Now. Most of the Relief Is Expected in 2027.

El Niño, the war around the Strait of Hormuz, a half-open Red Sea, face-offs in Arunachal Pradesh and an unsigned trade deal: the facts, what they suggest, and what they mean for one household, as of 25 October 2026, with later items marked.

A note on dates: these pieces respond to events up to 11 October 2026 (pieces 1–3), 17 October 2026 (piece 4) and 25 October 2026 (piece 5). Facts are drawn from the sources listed in the accompanying source sheets; interpretation and opinion are the author's own.

MUMBAI / BMC

Mumbai Does Not Need More Civic Spectacle. It Needs a BMC That Can Be Measured.

Three episodes in three weeks show a corporation that announces, reverses and fines. What is missing is a way for anyone to check how it is doing.

ADITYA TOTADE · MUMBAI · 11 OCTOBER 2026

Ask a Mumbaikar about the BMC and you will usually hear a party's name. Ask what the corporation has actually done about the dust, the garbage or the encroachment outside their building, and the answer gets thinner. That gap, between who controls the BMC and what it delivers, is what I want to look at, because the last few weeks have shown it more clearly than any manifesto could.

Start with construction debris. From Monday 12 October, the BMC will fine ₹25,000 per instance on any vehicle carrying debris without an active tracking system, and on any construction site not registered on its debris portal, according to a circular sent to the wards. The timing is easy to understand: the air is getting worse as the monsoon withdraws.

But the fine is not the number that interests me. Mumbai generates roughly 8,000 tonnes of construction and demolition waste a day. Its processing plants handle about 1,200. Five years ago the city is reported to have generated only 1,200 to 1,300 tonnes a day, so today's capacity looks sized for the Mumbai of 2021, before the Metro works, the road concretisation and the redevelopment boom. That is my reading; the BMC has not put it that way. To its credit, it has invited private firms to add 2,000 tonnes a day. Even if all of it gets built, capacity reaches about 3,200 tonnes, which is 40 per cent of today's volume. A fine cannot close that distance.

Then there is the portal. Between 24 August and 9 October it received 220 registrations, 109 of them from builders and developers, according to BMC data. I cannot tell you whether that is good or bad, because no one has published how many active sites the BMC expects to see. The corporation has said the portal will be linked to its building-permission system and will estimate the debris each project should produce. If that is right, the denominator exists. A tracking system without a denominator is not yet a measurement.

The second episode is messier. On 19 September the BMC announced a three-month drive, starting 1 October, against 39,111 slum structures 14 feet or taller, about 18 per cent of the 2,23,150 slum structures Mumbai has. It followed two fatal incidents, the Kurla

landslide and the Mankhurd house collapse. That is a serious reason to act. Unsafe structures kill people, and a municipal body that looks away is failing at its most basic job.

Then came the objections. Corporators from the BJP, Congress and Shiv Sena (UBT) said they had not been consulted. The Sena (UBT)'s Yashodhar Phanse asked on what basis structures were being shortlisted. The BJP's leader of the House, Ganesh Khankar, wrote to Commissioner Ashwini Bhide asking for a rollback and noting that nearly 40 per cent of Mumbai lives in slum pockets. On 1 October, the day the drive was meant to begin, Bhide said, "No mass action or special drive is planned," and that ward teams would keep up routine action with a focus on unsafe multi-storey structures. The joint commissioner who was to oversee the drive told Hindustan Times, "There was no special drive announced," even though the BMC's own press note of 19 September said otherwise. Opponents of the drive said that day they had nothing in writing.

I do not read this as a story with one villain. Corporators are right that a drive touching tens of thousands of homes should not reach them through a press note, and the questions they asked, why 14 feet, which structures, in what order, deserve public answers. The new line, routine action against what is genuinely unsafe, may well be the sounder policy. But a safety drive that is announced, opposed and disowned within two weeks says something unflattering about the administration too. The risk that prompted it did not change; the plan did, and I have not seen an explanation of why. An appointed commissioner and elected corporators answer to different people. What is missing is a set of facts they both have to answer to.

The Bombay High Court made a version of this point on 7 October. Hearing petitions about dumping at Kanjurmarg, the bench said clean roads in South Mumbai and Worli do not make Mumbai clean, singled out Jogeshwari and Malad, and asked the BMC for an affidavit on what ward officers have done to assess the ground reality. When a court has to ask for that, the missing information is a political problem, not just a technical one.

So what would "measurable" mean? Not a prettier dashboard. A bad system does not become accountable because it has an app. It would be something duller and more specific. For every major programme: what was promised, by when, how much has been spent, what is finished, what has failed, and who is responsible. For debris, three weekly numbers: tonnes estimated, tonnes tracked, tonnes processed. For demolitions, published criteria before the first notice goes out. For garbage, ward-level data the High Court does not have to ask for.

Mumbai's civic politics does not lack passion. It lacks a shared scoreboard. Until the BMC publishes one, and the commissioner and corporators agree to be judged on it, we will keep arguing about who is in charge. I would rather we start with one number and argue from there.

MAHARASHTRA

Maharashtra's Biggest Political Question Is Not Who Wins the Next Contest. It Is Whether the State Can Deliver.

Five council seats are absorbing both alliances. Meanwhile, 265 talukas are in drought.

ADITYA TOTADE · MUMBAI · 11 OCTOBER 2026

Maharashtra politics is rarely quiet. On 23 October, graduates and teachers will vote for five seats in the 78-member Legislative Council: three graduates' constituencies (Pune, Nagpur and Aurangabad, now Chhatrapati Sambhajinagar, divisions) and two teachers' (Pune and Amravati). Counting is on 27 October.

Nominations closed on 6 October and withdrawals on 9 October, and neither alliance came out tidy. In Pune's teachers' seat, the Shiv Sena's candidate pulled out only after the BJP's central leadership intervened. In Nagpur, a former BJP MLA is contesting as an independent against the party's official candidate. In the Chhatrapati Sambhajinagar graduates' seat, two Maha Vikas Aghadi partners, the Shiv Sena (UBT) and the NCP (SP), have fielded candidates against each other. Sixty-two people filed nominations for that one seat.

I do not think this is trivial. The upper house matters for legislation, and managing allies is what coalition government is; a government that cannot keep its partners in line will not last long. But I keep asking what the same effort would look like if it were pointed at the other thing happening in Maharashtra this month.

In early September the state declared drought in 265 talukas, about three-quarters of its total, after one of its driest monsoons in years. On 5 October the government ordered a minimum 10 per cent water cut from 16 October in every urban and rural local body, citing the deficient rain and the risk of El Niño stress running into next year. By 9 October, 611 tankers, 15 government-run and 596 private, were serving 517 villages and 2,147 hamlets across ten districts. The Chhatrapati Sambhajinagar division alone had 263 of them; Ahilyanagar had 153, Beed 111 and Solapur 98. That is a Marathwada-and-beyond problem, not a one-district one.

To be fair, the government's plan is more specific than most. It has mapped, dam by dam and use by use, how much water is available until 31 August 2027, with drinking water first, then livestock and fodder, and only then irrigation, starting with rabi food grains and fodder crops. Every reservoir keeps a 10 per cent emergency buffer, and joint squads

will patrol dams, rivers and canals to stop illegal extraction. A state that has thought about priority order is a state that is trying.

But look at the calendar. The water cut starts on 16 October. The vote is on 23 October. The plan runs to August 2027. One of those dates is organising political attention, and it is not the longest. Look at the map, too: the division with the most tankers is also the one where those 62 candidates are chasing a graduates' seat. That is coincidence, not cause. The graduates' electorate is not the village waiting for a tanker. But it shows how far apart the places where politics is intense and the places where the state is being tested can be.

What I would want to know is how the cut will be checked. A flat 10 per cent is easy to announce and easy to measure on paper. It bites very differently in a city with piped supply and in a village already waiting for a tanker. The government says availability will be reviewed regularly through guardian ministers and canal advisory committees. Will local-body compliance be published? The Water Supply and Sanitation Department's tanker report is already a measure; what I would like to see is the trend, week by week, rather than one day's count. And which districts will be able to show they are better off by next summer than they are now?

This is also about how Maharashtra works. A drought response runs through the water resources department, district collectors, municipal corporations, councils and gram panchayats. If any link breaks, the citizen experiences it as the failure of the whole state. Ministers can announce a plan from Mantralaya; they cannot deliver it from there.

Parties should contest elections, and allies will bargain over seats. That is democracy. I would just like at least one of Maharashtra's political competitions to be about outcomes. Citizens do not experience government through coalition arithmetic. On 24 October, the water cut will still be in force.

INDIA AND THE WORLD

Strategic Autonomy Is Becoming More Expensive for India. That Is Exactly Why It Matters.

In one week, a trade-talks "plateau", a peace proposal and a rupee defence turned a foreign-policy slogan into a bill.

ADITYA TOTADE · MUMBAI · 11 OCTOBER 2026

"Strategic autonomy" has been said so often in Indian foreign-policy debate that it can sound like filler. Over the past week it did not. On 4 October, External Affairs Minister S Jaishankar said India had gone "beyond advocacy" in trying to help end the Russia-Ukraine war. On 5 October, Finance Minister Nirmala Sitharaman said trade talks with the United States had reached a "plateau". On 10 October, the Reserve Bank of India opened a special dollar window for oil companies to defend the rupee. I think those are one story.

Start with Washington. Sitharaman said further concessions were "very, very difficult" for both sides, days after US Trade Representative Jamieson Greer said a deal was not imminent. The talks began in February 2025. India ran a surplus of almost $34 billion with the United States last fiscal year, Reuters reported, and Sitharaman said Washington "would want to reduce that imbalance." Russian oil sits in the middle. The US Congress has passed the Sanctioning Russia and Iran Act, expected to take effect by mid-October, which could expose Indian goods to tariffs of up to 100 per cent over purchases of Russian energy. On 9 October, Donald Trump announced a deal under which Russia will supply diesel to the US and global markets. The Indian Express's diplomatic editor calls these contradictory signals, and it is hard to disagree.

India's Russian crude imports crossed $43 billion in 2025, rose 25 per cent in the first half of 2026, and peaked at a record share of over 50 per cent, about 2.47 million barrels a day, in July. By September they had fallen to about 1.82 million. I do not know why; the reports I have seen do not say. But a country that trims a major supplier by roughly a quarter in two months while insisting on its independence is not holding a fixed position. Autonomy, as I read it, is a dial, not a switch.

The second story is India trying to be useful in Ukraine. Five Indian seafarers died in attacks on merchant ships in the second half of July, and India summoned diplomats from both Russia and Ukraine to protest. Since then it has floated a three-part idea: stop attacks on energy infrastructure, keep grain and energy moving through Black Sea ports, and end strikes on commercial shipping. Ukraine's foreign minister, Andrii Sybiha, called it the most comprehensive of the proposals Kyiv has received, from India, Egypt, Turkey

and the US. Vladimir Putin said Modi has “very good ideas”. Nothing I have read suggests either side has agreed to anything yet.

Critics will say a country that buys discounted Russian oil is not a neutral broker, and Kyiv was angry about those purchases for years. That is fair. But I do not think self-interest cheapens the effort. Black Sea ports account for nearly 30 per cent of Russian energy flows to India, according to Hindustan Times. Indians are roughly one in ten of the world’s seafarers. Jaishankar has said grain, fertiliser and fuel are concerns for India and the wider Global South. A mediator with real interests at stake is at least easier to explain.

And then the bill. The rupee is down more than 7 per cent this year and sits near its record low, under pressure from oil and global bond yields. The RBI raised its policy rate by 25 basis points to 5.5 per cent on 7 October, its first hike in almost four years. On 10 October it said it would supply dollars directly from its reserves to Indian Oil, HPCL and BPCL, and required dealers to hold a 20 per cent reserve on certain hedging contracts. An ANZ strategist told Reuters the first step “will show up in a depletion of reserves.” Autonomy has a price, and some of it is paid in reserves.

That is why I do not accept the idea that strategic autonomy means refusing to choose. That is the easy version, and it is only cheap when the world is calm. What it should mean is having enough economic, energy, technological and military capacity that India’s decisions are its own, and not the only ones left on the table. That is domestic work: diversifying energy sources, building manufacturing and defence capability, and keeping reserves deep enough to absorb a shock like this one. Foreign policy begins at the balance sheet.

The next test is already on the calendar: Modi is expected to travel to the US for the G20 summit in December. A more divided world makes all this harder. It also makes it necessary. India does not need permanent friends or permanent enemies. It needs permanent options, and they are expensive to keep. This week’s headlines are the receipt.

MAHARASHTRA

Drought, an Exam Leak and Protest Policing: Maharashtra's Three Tests Come Down to Trust

What the government, the opposition, the people affected and the officials in between have each said and done, as of 17 October 2026.

ADITYA TOTADE · MUMBAI · 17 OCTOBER 2026

In the first half of October, Maharashtra's government faced three tests at once: a widening drought, a protest in Pune by candidates for state government jobs that ran from 1 to 12 October, and a continuing argument about law and order. Coverage of each tends to quote one camp. This piece sets out what each group has said and done, where they disagree on the facts, and what would settle those disagreements.

The drought: a relief package, and an argument about its size

The scale is not in dispute. The state declared drought in 265 of its 358 talukas (sub-districts), and on 14 October the cabinet added 40 more, taking the total to 305. On 8 October the state's dams held 73.5 per cent of their live storage, against 90.6 per cent a year earlier; in Marathwada the figure was 43.6 per cent, against 85.9 per cent. Tankers supplying drinking water rose from 611 on 9 October to 783 by 15 October, by one regional count. Water Resources Minister Girish Mahajan ordered a minimum 10 per cent water cut in every municipal corporation, municipality and gram panchayat from 16 October: "Drinking water will be given the highest priority." Water for drinking is reserved until 31 August 2027. Pune has added a weekly day without supply; Nagpur fines residents Rs 5,000 for wasting water.

The government's main answer came on 14 October. Each affected farmer is to receive Rs 5,000 in their bank account before Diwali, paid from state funds. Chief Minister Devendra Fadnavis explained why the state was not waiting for the Centre: "Central government relief protocols involve procedures and timelines that cannot be finalised before Diwali. Understanding this urgency, the state cabinet decided to step in immediately." It also announced a finalised loan-waiver list of 3.5 lakh (350,000) farmers, GPS trackers on tankers, more than 16,000 illegal water connections cut, educational fee waivers, and instructions to lenders not to force repayments. Deputy Chief Minister Sunetra Pawar said the state would add assistance once the central inspection team, which toured eight districts from 9 October, made its recommendations. That report is not yet public.

The opposition and farmer groups said the package falls short. Congress MLA Vijay Wadettiwar called Rs 5,000 "rubbing salt into the wounds" and asked why money could

be found for the Kumbh Mela and the Shaktipeeth Expressway, a planned state highway: “Gaining the blessings of farmers is far more important than funding the Kumbh Mela.” Kailas Patil, an MLA of the Shiv Sena (Uddhav Balasaheb Thackeray), called it an “insult and mockery”. Anil Deshmukh of the Nationalist Congress Party (Sharadchandra Pawar) said the government had first promised help to all affected farmers and then scaled it back. I found no government reply to either point. The All India Kisan Sabha, a farmers’ union, called the package a “cruel joke” and wants compensation matched to the sums insured under the national crop insurance scheme. It has announced vehicle convoys from Akole towards Mumbai from 26 October and an indefinite sit-in at Azad Maidan from 27 October.

The government calls the Rs 5,000 an advance; the criticisms concern its size and what was promised. Judging either depends on information that is not yet public: what the package costs in total, how many farmers it reaches, and what the central team recommends. I have not found an official figure for either of the first two.

The MPSC protest: a settlement, not yet a resolution

The protest has a long fuse. The Maharashtra Public Service Commission (MPSC), which recruits for state government posts, held a screening exam for Food and Drug Administration drug inspectors on 22 March. In July, candidates complained that the paper had leaked; the commission asked Mumbai Police to investigate, and in late August it cancelled the whole recruitment. From 1 October, candidates sat in at three sites in Pune. Their main demand was the resignation of the commission’s chairman, Vivek Bhimanwar, but the sites did not agree on everything: one group wanted the objective exam pattern kept, another wanted the descriptive one.

The Chief Minister set out the government’s position on 9 October. He said the chairman “joined after the leak took place”, that only the President can remove a commission member under Article 317 of the Constitution, and that the government would recommend removal if an inquiry found wrongdoing by anyone, past or present. He also said: “It is no longer a student agitation; it has turned entirely political.” IANS reported him saying the High Court had declared the sit-in illegal and that, despite its directions, the protesters remained “in contempt of court”.

The Bombay High Court had heard a petition on 7 October, after residents complained of blocked roads. As reported by Sabrang India (I could not check the order itself), a bench of Chief Justice Mahesh Chandra Tripathi and Justice Advait Sethna said “They are students and not anti-socials,” and that students who suspect malpractice have every right to agitate. It also said “Public inconvenience shouldn’t happen,” asked protesters to seek permission and move off public roads, and gave the State three weeks to file its recruitment plan and the vacancies in each department, noting that more than 70,000 posts had been shown as vacant. The reports I found of the hearing do not show the bench declaring the protest unlawful.

The opposition stood with the students, though not with one voice. The NCP (SP)'s Rohit Pawar joined the sit-in, and the Shiv Sena (UBT)'s Aaditya Thackeray backed the demand for resignation. Raj Thackeray, whose Maharashtra Navnirman Sena sits outside the opposition alliance, shared the students' anger but told them plainly that their demand for recruitment to 70,000 posts would not be met: "Even if another government comes, this demand will not be fulfilled."

A settlement came after midnight on 12 October. The chairman did not resign; he went on leave until an inquiry is completed, saying "The autonomy, credibility, and interests of students of the MPSC have always been my priority." A five-member committee headed by a retired judge, with the IAS officer Tukaram Mundhe as its secretary, is to report on structural flaws in the commission within two months (the 5 October proposal had said three). Minister Shivendraraje Bhosale announced that cases against protesters would be withdrawn and that 70,000 posts would be filled over three years. Rohit Pawar called it a win for the students: "The children took one step back, but the government took ten steps back." Reports say some protesters would accept nothing short of resignation.

One point of fact remains open. The public record shows Mr Bhimanwar was sworn in on 18 February 2026, and the exam was held on 22 March. The Chief Minister's statement that he joined after the leak would fit if the paper left the system before mid-February, or if he was referring to earlier alleged leaks; I found no clarification. Nothing on the public record suggests wrongdoing by Mr Bhimanwar. When and where the paper leaked is for the inquiry to establish, and its answer will matter to both sides.

Law and order: crime and protest policing

No single crime has dominated this month's debate. The argument has two strands.

The first is about crime and the Home Department, which the Chief Minister also holds. In September, after relatives of a state minister were assaulted in a land dispute in Paithan, Congress state president Harshwardhan Sapkal asked, in Marathi, whether Maharashtra had become "Taliban" (my translation) and demanded that Mr Fadnavis give up the Home portfolio. Congress made a similar demand in May, after the rape and murder of a young child in Pune district; the government's response then was to send the case to a fast-track court and seek a special public prosecutor. I found no government reply to the September remark.

The second is about how protests are policed. Pune Police refused permission for the MPSC sit-in, citing prohibitory orders, issued notices to 51 students and 29 coaching-class operators, and registered cases against protesters. Rohit Pawar alleged the cases were false; I found no police reply to that allegation. Withdrawing the cases became part of the 12 October settlement. In a 6 October statement on student protests, the Chief Minister accused "certain political factions" of using student agitations for their own ends. The opposition raised the issue before: in July, Congress objected to a video of a Mumbai

police driver threatening detained student protesters; the driver was removed and the Chief Minister ordered a probe.

The data will not settle the argument by itself. The National Crime Records Bureau's figures for 2024, published this year, show Maharashtra registering 24,171 crimes against children, the highest number of any state. By rate, one secondary report places it behind Madhya Pradesh among the states with the highest counts (66.9 against 76.2 per lakh children). Raw counts also reflect population, Maharashtra being India's second most populous state, and how readily police register complaints. Crime rates and conviction rates are the fairer test; I found no statement from either side that puts them at the centre of its case.

What connects the three

In each dispute, the figures that would settle it are not yet public, and each side is arguing without them: the total cost and reach of the drought package; when the MPSC paper leaked, and how many posts are vacant department by department; and whether Maharashtra is becoming less safe per person, or only more visible.

Some of those figures are due soon: the High Court's three weeks for vacancy figures run out around 28 October, and the MPSC committee reports around mid-December. A government that publishes the totals, dates and rates as each deadline arrives will have answered many of its critics. An opposition that engages with those numbers will have done its job too.

Self-directed writing sample, not commissioned. Every fact is attributed to a dated source in the accompanying source sheet. Allegations are reported as allegations, and where the sides disagree on a fact, both versions are given.

INDIA AND THE WORLD

Five Outside Pressures Reach India Now. Most of the Relief Is Expected in 2027.

El Niño, the war around the Strait of Hormuz, a half-open Red Sea, face-offs in Arunachal Pradesh and an unsigned trade deal: the facts, what they suggest, and what they mean for one household, as of 25 October 2026, with later items marked.

ADITYA TOTADE · MUMBAI · 25 OCTOBER 2026

There are five pressures on India right now, and most of them were set in motion outside it. I feel them where most of us do: at the petrol pump, in the rent, and, as someone looking for my next role, in the job market. This is my attempt to explain them the way I would to a friend, and the way I would to a board that wants the numbers. I am not here to say who is right. I set out the facts, then what they suggest.

Start with the people. Officials said on 8 October that 16 Indian seafarers had been killed since 28 February, 11 in West Asia and the Gulf and five in the Black Sea, a separate war. Another 4,232 had been brought home from the Hormuz area. On 21 October a resident of Indian nationality was one of two people killed at King Fahd International Airport in Dammam, Saudi Arabia, which the Houthis said they had attacked.

At home the costs are quieter. A litre of petrol in Mumbai cost Rs 111.21 on 25 October, unchanged since at least 16 October. In the week to 23 October, Brent crude rose 6.24 per cent to $116.72 a barrel. Why have those two numbers stayed so far apart?

The weather: a strong El Niño after a weak monsoon

The monsoon ended at 87 per cent of its long-period average, the lowest since 2015, the India Meteorological Department (IMD) said on 30 September. The south got 76 per cent. The World Meteorological Organization says El Niño, the Pacific warming that tends to weaken Indian rain, is “firmly established and strengthening rapidly”, with a near-100 per cent chance it lasts through February 2027. The US agency NOAA puts the chance of a historically strong event in October to December at 83 per cent.

The Centre has lowered its 2026-27 foodgrain target to 373.93 million tonnes. Food inflation reached 7.74 per cent in September, and onions cost 108.09 per cent more than a year earlier. Is that El Niño? No source I read says so, so I leave it as a question. Maharashtra’s drought now covers 305 talukas (sub-districts), which I wrote about on 17 October.

My reading is that a weather shock reaches the kitchen first and the farmer's income next, and the winter crop is the next test.

Hormuz: a ceasefire declared over, a blockade still on

The war began on 28 February with US-Israeli strikes that killed Iran's Supreme Leader, Ali Khamenei. A ceasefire announced on 7 April and a memorandum signed on 17 June fell apart over late June and July, and Donald Trump called the ceasefire "over" on 8 July. Some outlets still describe a fragile ceasefire. I found no agreement signed since. CBS reports that the US blockade of Iranian ports, reinstated on 14 July, remains, and that talks run indirectly through Pakistan and Qatar.

Why does this matter so much to India? Before March, about 45 per cent of its crude imports, about half its liquefied natural gas and 90 per cent of its LPG (cooking gas) came through the Strait, according to the Atlantic Council.

The two governments tell it very differently. Trump says Iran is "making up fake hits, mines" and that "more Oil is coming through the Hormuz Strait now than it did even prior to the beginning of the Conflict". Lloyd's List counted 104 non-Iranian-linked transits in the week of 5-11 October, 17 per cent fewer than the week before but 31 per cent above its August weekly average, and at least 28 attacks in October by 22 October. It gives no pre-war figure, so it cannot settle Trump's comparison either way. Trump also accuses Iran of trying to "drive up the price of Oil prior to the U.S. Midterm Election", and on 1 October he said: "I believe right after the election we'll win, but maybe before the election."

Iran's Foreign Minister, Abbas Araghchi, says: "The negotiating table remains in place. It is the American side that is closing the path, not Iran." Its top negotiator, the parliament speaker Mohammad Baqer Qalibaf, said on 4 October that "the Strait of Hormuz will not open until our seven conditions based on the Islamabad memorandum are met." Israel's prime minister, Benjamin Netanyahu, six days before what AFP called a tight election, spoke on 21 October of "toppling the regime in Iran. And that is my directive to the [IDF], the Mossad, and the security services".

For Indian crews, the rules have changed twice. In July the Directorate General of Shipping told owners not to put Indian seafarers on Hormuz voyages. On 5 August it replaced that with precautions and individual consent. Frontline argues that consent alone will not protect crews. I found no government reply.

I think the risk to India sits less in who wins than in whether the Strait stays contested, because that is where the fuel and the cooking gas come from.

The Red Sea: half back, and priced that way

Suez Canal transits in September were 39 per cent below pre-crisis levels, and the Bab el-Mandeb strait was 47 per cent below, Lloyd's List reports. Maersk and Hapag-Lloyd are routing one joint service back through Suez, first sailing on 27 October, which Hapag-

Lloyd says “does not amount to a strategic return of its full network”. Drewry’s index put a 40-foot container at $4,585 on 22 October, 163 per cent above a year earlier.

Trade has not stopped. Jawaharlal Nehru Port in Navi Mumbai handled a record 834,697 TEU (twenty-foot container units) in September. Globally, it costs more to move a box.

Arunachal: face-offs confirmed, a naming dispute on paper

The firmest fact comes from India’s own border force. “In the past few-days, a situation arose where face-off happened at several locations in Arunachal and it still continues,” Shatrujeet Kapur, head of the Indo-Tibetan Border Police (ITBP), said on 22 October. The Hindu reports that the video was then removed. The Ministry of External Affairs said the border “gets disturbed from time to time when Chinese forces diverge from established patrolling patterns”, and that both sides “continue to use existing diplomatic and military mechanisms”. Defence sources told The Indian Express that no violent clashes have been reported. Unnamed government sources told The Hindu of Chinese tents near Taksing in Upper Subansiri. That is not officially confirmed, so I do not rely on it.

The naming dispute is better documented. India named 27 places in Arunachal on 7 August. Beijing replied that “Zangnan region is China’s territory” and called the names “illegal, null and void”. India called Arunachal “an inalienable and integral part of India”. On 13 October China rejected India’s names for 28 places in Ladakh. On 25 August both sides had agreed that “any situation on the ground would be addressed promptly”, and Xi Jinping visited Delhi in September.

At home, Congress president Mallikarjun Kharge called the ITBP chief’s confirmation “deeply alarming”, and Jairam Ramesh spoke of “a deafening silence from the PM”. Separately, violent protests broke out on 23 October against the Siang Upper dam, which India says is needed to counter China’s Yaxia project. Chief Minister Pema Khandu said: “Question us, have dialogue with us, instead of violence.”

On 26 October, after this piece was first written, China’s foreign ministry spokesperson Guo Jiakun said China “has consistently and strictly abided by the relevant agreements and important understandings between the two countries, conducting routine patrols and management activities in the border areas”, and that the two countries “remain in communication through diplomatic and military channels”.

If tensions that The Hindu dates to July “still continue”, whether “promptly” is being met is an open question. Beyond the ITBP chief’s remark and Beijing’s description of “routine patrols”, neither government has said where the face-offs are or what happened at them.

Trade: a payoff dated 2027

In Berlin on 22 October, the Commerce Minister, Piyush Goyal, said the EU agreement “will be signed before the end of the calendar year 2026”. Between 15 and 23 October the start date he gave, or was reported giving, ran from February 2027 (a reporter’s paraphrase) to the first quarter, to “March or April”, to four to five months after signing

(as Reuters reported). The European Commission calls it a deal that "brings together two of the world's largest economies". It asked the Council on 11 September for approval to sign, after which the European Parliament must consent and India must ratify. Goyal also told Europe it was "inviting disaster" with its carbon border tax and 50 per cent steel duty.

With Washington there is still no signed deal. Goyal said on 15 October a first tranche "has been finalised", ten days after the Finance Minister spoke of a "plateau" (the two may describe different stages). A 60-day US tariff waiver over Russian oil buys time. Ajay Srivastava of the Global Trade Research Initiative says it lets Washington "keep the threat hanging over New Delhi".

Put the five together and a pattern shows. The costs arrive now, while the clearest relief on this list, cheaper trade with Europe, is dated 2027.

Then and now

The simplest way I know to see these pressures is to keep a benchmark: today's price against a month ago, a year ago and ten years ago. Where a row has no month-ago or ten-year figure, I could not find one I trusted. All prices are nominal, not adjusted for inflation.

- **Petrol, Mumbai, a litre:** Rs 111.21 now and a month ago. Rs 104.21 a year ago. Rs 72.83 in October 2016.
- **Brent crude, a barrel:** $115.22 on 20 October (the latest daily figure I could open; about $114 on 26 October) and $116.01 a month earlier. $65.80 a year ago. $49.80 in October 2016.
- **Domestic cooking gas, Mumbai, 14.2 kg cylinder:** Rs 941.50 now and a month ago. Rs 852.50 a year ago.
- **Onions, a kg (news-reported all-India average retail price, a different series from the official index above):** Rs 52.68 on 15 October and Rs 53.92 a month earlier. Rs 26.64 a year ago.
- **Rupee to the US dollar (US Federal Reserve series, not the RBI reference rate):** 94.96 on 16 October and 95.81 a month earlier. 87.83 a year ago. 66.89 in October 2016.
- **RBI repo rate:** 5.50 per cent now, after 5.25 per cent a month ago. It was 5.50 per cent a year ago too.
- **Unemployment, all India, age 15 and over:** 5.0 per cent in September, 6.9 per cent in cities. A year earlier: 5.2 per cent, and 6.8 per cent in cities.
- **Rent:** I found no reliable Mumbai rent series. The official housing component of retail inflation, which mixes rent with water, electricity, gas and other fuels, rose 2.74 per cent in the year to September.

One line stands out. In a year, crude is up about 75 per cent and the dollar costs about 8 per cent more rupees, but petrol at the Mumbai pump is up about 7 per cent. Onions have roughly doubled. Crude is only part of what a litre costs at the pump, so I would not expect petrol to rise by 75 per cent. But 7 per cent against that crude move suggests part of the extra cost is sitting somewhere: with the oil companies, in tax receipts or in a delay in passing it on. I found no source that says which.

Questions nobody has answered yet

These are not accusations. They are the answers that would let any reader judge for themselves, and I could not find them:

- Crude is up about 75 per cent in a year and the Mumbai pump price about 7 per cent. Which part of the difference is being carried by the oil companies, by tax receipts or by a delay in passing it on, and for how long?
- How many seafarers have declined Hormuz voyages since consent became the rule, and does refusing carry any penalty?
- Why was the ITBP chief's video removed, and by whom? The Ministry of External Affairs addressed the border but, in what I read, not the opposition's charge of silence.
- What is actually happening at the locations? India's border-force chief says face-offs continue, and China says its troops conduct "routine patrols". Neither side has said where, or how many.
- How will Brussels and Berlin answer Goyal on the carbon tax and the steel duty?
- What do the Siang dam protesters want, and what does the state-owned builder, NHPC, say? The AFP report gives neither.

What it means for one household

Take one Mumbai family with a home loan and a relative working in the Gulf or at sea.

Food. If the family spends Rs 10,000 a month on food (my assumption), September's 7.74 per cent food inflation means roughly Rs 774 more than a year ago. That is an estimate, because no family buys exactly the official basket.

Fuel and cooking gas. The domestic cylinder is unchanged at Rs 941.50. The commercial 19 kg cylinder rose Rs 63 to about Rs 2,764 on 1 October, about 2.3 per cent, which hits restaurants and tiffin services first. If petrol rose 5 per cent (an illustration, since none is announced), Rs 111.21 would become about Rs 116.77, and a rider using 30 litres a month would pay about Rs 167 more.

EMIs and the rupee. The Reserve Bank raised its repo rate to 5.50 per cent on 7 October and moved to "calibrated tightening". My estimate: on a Rs 50 lakh, 20-year floating loan, a full 0.25-point pass-through from 8.50 to 8.75 per cent lifts the EMI from about Rs 43,391 to Rs 44,186, or Rs 794 a month. The rupee closed at 96.78 to the dollar

on 8 October (market close), near its record low, so foreign fees, travel and imported phones cost more.

Jobs. For seafarers, a Hormuz voyage now needs their individual consent. Gulf workers face Houthi attacks on Saudi airports that had killed at least 21 people between 1 and 22 October, Saudi authorities say. Exporters face freight rates that Drewry puts 163 per cent higher worldwide than a year ago (I found no India-specific figure), for EU tariff cuts that arrive in 2027 at the earliest. Farmers face a winter crop the IMD expects to get mostly below-normal rain.

Water. An 87 per cent monsoon leaves less margin before summer. The water cut I described on 17 October is the first sign.

What I would tell a Mumbai family

I am unsure how this will go, and I would be wary of anyone who sounds certain. What I would tell a family is what I try to do myself. Watch what is happening around you: the pump price, the vegetable vendor's rates, the rent renewal. Keep yourself posted across the news channels, the mainstream papers and the independent journalists, not just one of them. Then draw your own inference about what it means for you, as one person.

What to watch

These are my assessments, not facts.

- **Hormuz.** A grinding stalemate of ship attacks and indirect talks is likely. A sharper US escalation before February is an even chance, and the 3 November US midterms are one date to watch. A deal that fully reopens the Strait before February is unlikely, because this war's two truces nominally lasted about three months and about three weeks.
- **El Niño and food.** High food prices through winter are likely. NOAA and October inflation figures both come on 12 November, and the RBI meets on 2-4 December. Another rate rise would reach EMIs.
- **Arunachal.** Managed friction is likely. A serious rupture is remote.
- **Trade.** Signing by 31 December is an even chance. Entry into force by April 2027 is unlikely, with the European Parliament and ratification still ahead.

Due this week: Israel votes on 27 October, the first Maersk and Hapag-Lloyd sailing back through Suez is scheduled for 27 October, and the ITBP chief retires on 31 October.

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