TRUTH, TRANSLATED

Plain language for a complicated world. Clear takes on education, geopolitics, political accountability and Big Tech.

EDITION 4 · OCTOBER 2026



IN THIS EDITION

Australia deserves smarter migration policy

Not a race to the bottom

International education's warning

Student preference falls as visa grants collapse

When closing a classroom becomes a crime

The ICC and girls' education in Afghanistan

The strait that runs through your fuel bill

Hormuz and Australia's fuel security

When the floodwaters reached parliament

The Philippine flood control scandal

Dr Sukh Rashpal Sandhu | Subscribe free on LinkedIn

EDITION 4 | OCTOBER 2026

Contents

Truth, Translated: October 2026 3
Truth, Translated: Australia deserves smarter migration policy, not a race to the bottom . 4
Australia's International Education Warning: Student Preference Falls as Visa Grants Collapse in Key Markets 9
Truth, Translated: When Closing a Classroom Becomes a Crime 15
Truth, Translated: The Strait That Runs Through Your Fuel Bill 23
Truth, Translated: When the Floodwaters Reached Parliament 31
Truth, Translated: Meta's Year in Court, and a US$25 Billion Lesson in Broken Promises 39
Follow us on LinkedIn 47
About Truth, Translated 49

INTRODUCTION

Truth, Translated: October 2026

By Dr Sukh Rashpal Sandhu

Edition 4 of Truth, Translated: 6 pieces for October 2026.

Plain language for a complicated world. Clear takes on education, geopolitics, political accountability and Big Tech.

This edition brings together 2 pieces first published in Truth, Translated on LinkedIn, each carrying the date it first appeared and 4 new features written for this edition. Republished pieces appear as they were first published, with their original images; facts, figures and links are as they stood on that date. New features are marked "Written for this edition".

In this edition

- Truth, Translated: Australia deserves smarter migration policy, not a race to the bottom
- Australia's International Education Warning: Student Preference Falls as Visa Grants Collapse in Key Markets
- Truth, Translated: When Closing a Classroom Becomes a Crime
- Truth, Translated: The Strait That Runs Through Your Fuel Bill
- Truth, Translated: When the Floodwaters Reached Parliament
- Truth, Translated: Meta's Year in Court, and a US$25 Billion Lesson in Broken Promises

Thank you to every reader who subscribes, shares and responds.

Warm regards,
Dr Sukh Rashpal Sandhu
Author, Truth, Translated

TRUTH, TRANSLATED

Truth, Translated: Australia deserves smarter migration policy, not a race to the bottom

By Dr Sukh Rashpal Sandhu | First published 21 October 2026

"The biggest cut to immigration in the history of this country." "Regain control of our borders." "Stop the boats." "Mass migration." Universities as a "backdoor" into Australia.



Over the past few months, these lines have dominated the immigration debate, and each one is designed to make voters feel that the country is being overrun and that only one party can save it. The numbers have become weapons. One Nation promises three years of net negative migration and 750,000 fewer temporary visa holders. The Coalition answers with 100,000 a year, positioned as tougher than Labor and only slightly softer than One Nation, while declining to release costings until closer to the 2028 election. Labor, under pressure in the polls, tightens student and family visa rules and insists it is "taking control." Each figure is less a policy than a bid, pitched to win back a slice of the electorate rather than to solve a defined problem. Housing shortages, rising rents, crowded trains and hospital waiting lists are all folded into a single message: fewer migrants will fix everything. International students, who cannot vote, have become the easiest target of all.

Australia needs an honest conversation about immigration. Households struggling with rent, commuters sitting in worsening traffic and patients waiting months for specialist

appointments deserve real answers, not an auction where the lowest number is treated as proof of the strongest leadership.

Governments should review migration settings regularly. That is not the problem. The problem is that education, workforce planning and community trust are being caught in the crossfire of a contest for votes.

What the numbers actually say

Fear works best when the facts are left out, so the facts deserve attention first.

According to the ABS, net overseas migration was around 538,000 in 2022-23, 429,000 in 2023-24 and 306,000 in 2024-25. The latest quarterly release puts it at 292,100 for the year to March 2026. Recent figures will be revised, but the direction is clear. Migration has already fallen a long way from the post-pandemic peak.

The debate also routinely confuses figures that measure entirely different things. Visa grants, student commencements, border crossings, permanent places and net overseas migration are not the same number. In June this year, the ABS warned that using travel movement data as a substitute for net overseas migration would have overstated 2025 migration by 60%, or 179,570 people. That is the kind of distortion that shapes how an entire country feels about an issue.

Behind the slogans: what each party is proposing

Labor aims to bring net overseas migration down to 225,000 a year by 2028. Its changes include new restrictions on international students and their families and changes to working holiday arrangements. New student visa rules commenced on 2 October.

The Coalition’s plan sets net overseas migration at 100,000 in each of its first two years, followed by 130,000 and 160,000. It would reduce “core” temporary visa holders by about 650,000 over four years, cap new international student commencements at 240,000 and abolish the Temporary Graduate visa, with some exceptions.

One Nation proposes cutting temporary visas by 750,000, running net negative migration for three years and then capping it at 130,000. These are targets on paper. No modelling has yet shown what they would do to the economy.

Not every party has joined the contest. The Greens have opposed restrictions on students’ families and criticised the treatment of students as scapegoats.

The parties are also not comparing like with like. A four-year reduction in visa holders is not an annual net migration figure, and neither is a cap on student commencements. Placing these numbers side by side without explaining the difference only deepens public confusion, and confusion makes fear easier to sell.

Skilled migration: the backbone that rarely gets mentioned

Lost in the bidding war is a simple fact. Skilled migration is one of the strongest assets any modern economy has, and Australia is no exception.

The evidence on public finances is clear. Treasury’s own analysis found that the Skill stream delivers the most positive lifetime fiscal impact of any permanent migration stream, ahead of Family and Humanitarian. The 2018-19 permanent migrant cohort was

fiscally positive for both the Commonwealth and the states and territories, with age on arrival and labour market performance the main drivers. Skilled migrants arrive in their working years, often with qualifications paid for elsewhere, and begin paying tax almost immediately.

The workforce need is just as clear. Hospitals, aged care, engineering, technology and the building industry all rely on skilled migrants to fill gaps that domestic training cannot close quickly enough. Cutting skilled arrivals without a credible plan to train the same workers locally does not protect Australians. It leaves them waiting longer for a nurse, a specialist or a new home.

Six narratives, translated

The immigration debate now runs on a set of claims repeated so often they are treated as settled fact. Each deserves to be tested against the evidence.

Narrative 1: "Migrants caused the housing crisis." *Verdict: Misleading.*

Population growth does add to housing demand, and that should be acknowledged openly. A 2026 study of Australian neighbourhoods by Peruffo and Check found that a one percentage point rise in net overseas migration as a share of local population was linked to unit rents rising about 5.0% and house rents about 3.6%. But the same research found those effects were concentrated in neighbourhoods with low dwelling approval rates, where new supply is most constrained.

In other words, the damage is greatest where housing is not being built. That points to planning, approvals and construction capacity, not migration alone. And the building industry itself is short of workers. Master Builders Australia notes that only about 4% of Australia's construction workforce is immigrant, compared with 23% in Canada, while an additional 139,000 residential construction workers are needed to meet the Housing Accord. Cutting migration while the country cannot find enough bricklayers and carpenters does not solve a supply shortage. It can deepen it.

Narrative 2: "Migrants take Australian jobs and push down wages." *Verdict: Not supported by the evidence.*

Australian research has repeatedly tested this claim. An ANU study by Breunig, Deutscher and To found almost no evidence that immigration harms the labour market outcomes of Australian-born workers, and a 2020 study by Crown, Faggian and Corcoran found the skilled visa program raises wages for Australian-born workers, with no negative wage effects at either skill level. Migrants are workers, but they are also customers, renters, business founders and taxpayers. They add to demand as well as supply.

Narrative 3: "Immigration brings crime." *Verdict: False on the available data.*

The ABS reported that 32.0% of Australia's population was born overseas at June 2025. Yet in the ABS prisoner census for 2023, about 83% of prisoners were born in Australia and roughly 14% were born overseas. People born overseas are substantially under-represented in Australian prisons relative to their share of the population. Individual crimes deserve full accountability. Attaching them to entire migrant communities does not.

Narrative 4: "International education is a backdoor riddled with fraud." *Verdict: Half-truth used to justify the wrong solution.*

Misconduct in parts of the sector is real. Dishonest agents, non-genuine providers and exploitative employers have caused genuine harm, and the education sector has every reason to want them gone. But misconduct by a minority is an enforcement problem. The answer is targeted action against the operators involved, with published results. Cutting genuine students across the board punishes compliant providers, legitimate learners and a A$55 billion export industry for the behaviour of those who broke the rules.

Narrative 5: "Migration is out of control." *Verdict: Contradicted by the official figures.*

Net overseas migration has fallen from around 538,000 in 2022-23 to 292,100 in the year to March 2026. Whatever the right level is, a figure that has dropped by close to half is not a system spiralling out of control.

Narrative 6: "Migrants are a drain on the budget." *Verdict: False for the permanent program as a whole.*

Treasury's lifetime fiscal analysis found the 2018-19 permanent migrant cohort was fiscally positive, with skilled migrants contributing the most. The claim that migrants take more than they give does not survive contact with the government's own modelling.

Education needs its own framework

Genuine international education and training should be assessed separately from headline immigration targets.

This needs to be stated precisely. Under the ABS approach, anyone who lives in Australia for 12 months out of 16 counts towards population change, and international students often meet that test. They need housing, use public transport and access health services. Planning must account for that honestly, and students should not be removed from population statistics.

The distinction is between counting people and setting policy targets. A person who comes to Australia to complete a qualification should not be presented to the public as someone arriving to settle permanently.

Separate, clear figures should be published for temporary education, permanent migration, graduate transitions and population pressure. Each can then be judged on its purpose and its cost.

This sector is not small change

The Department of Education reports A$55.0 billion in international education export income for 2025. Of that, roughly A$40.84 billion relates to higher education, A$10.06 billion to vocational education and training and A$1.25 billion to English language courses. Victoria's sector alone accounts for around A$17.85 billion.

These are export income figures. They do not represent net economic benefit or tax revenue, and they should not be oversold. They do, however, show the scale of what is at stake.

Behind those numbers are trainers, assessors, administrative staff, landlords and small businesses near every campus. There are also graduates who return home and spend their careers building business and professional ties with Australia. Over more than two decades in this sector, that pattern has repeated itself many times.

Smarter policy options

1. Protect and prioritise skilled migration in genuine shortage areas, particularly construction, health and aged care, while expanding domestic training in the same fields.
2. Provide international education with a stable framework offering planning certainty over several years. Tie growth to quality, student support, accommodation and genuine outcomes.
3. Target misconduct properly. Act against fraudulent applications, exploitative employers, dishonest agents and providers delivering poor training, and publish the enforcement results so the public can distinguish real reform from political theatre.
4. Require published impact assessments before major changes. Set out the expected effects on rents, skills shortages, education exports, the budget and regional communities, along with the assumptions and uncertainties.
5. Fix housing supply directly. Speed up approvals in constrained areas, link enrolment growth to student accommodation, and recruit the construction workers the Housing Accord depends on.
6. Measure success by living standards, housing availability, access to services, productivity and educational quality. A lower migration number is an input. It is not proof that a policy worked.

Immigration as a vote bank is not acceptable

Fear is an effective campaign tool. It is a poor foundation for policy.

People worried about housing deserve better than someone to blame. Migrant communities deserve better than being celebrated at Diwali and Lunar New Year, then treated with suspicion when an election approaches. International students deserve clear rules and basic respect.

The private motives behind every announcement cannot be proven. What can be questioned is a debate that rewards the most dramatic promise and the most frightening narrative before anyone has assessed the cost.

Winning votes on the back of immigration anxiety will not fix the problems Australians are facing. It risks weakening the skilled workforce the country depends on, damaging a sector that works, eroding trust between communities and diverting attention from the difficult work of governing.

Migration can be managed firmly, educational quality can be protected and growth can be planned responsibly. These are not competing goals.

Australia deserves policy built for its future, not its next election.

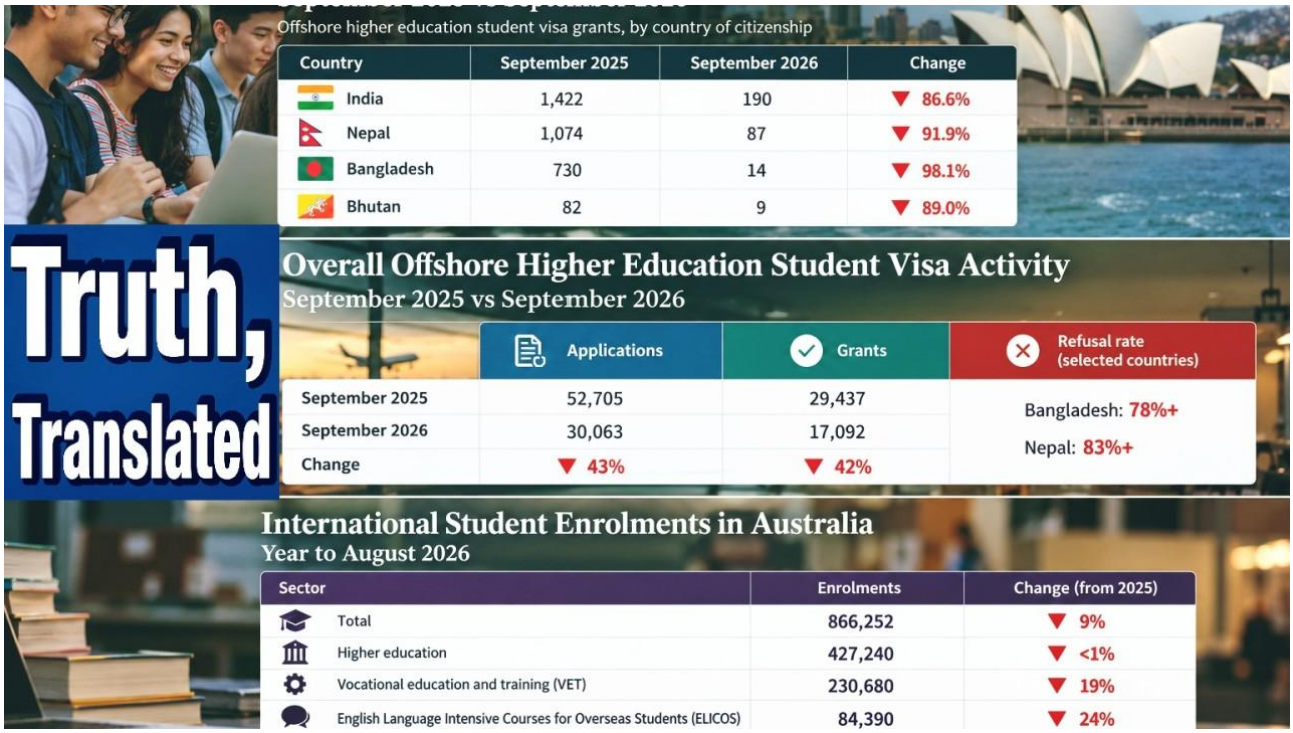
#TruthTranslated #AustralianPolicy #SkilledMigration #InternationalEducation #VET #MigrationPolicy

TRUTH, TRANSLATED

Australia's International Education Warning: Student Preference Falls as Visa Grants Collapse in Key Markets

By Dr Sukh Rashpal Sandhu | First published 29 October 2026

Australia's international education sector is facing a concerning combination of declining student preference, falling visa applications and sharply reduced visa grants across several important recruitment markets.



By Dr Sukh Sandhu | 29 October 2026

The latest findings from IDP Education's *Emerging Futures 10: Voice of the International Student* research, released on 27 October 2026, reveal that Australia's position as a preferred international education destination has weakened considerably in just six months.

When these findings are examined alongside the Department of Home Affairs' September 2026 student visa statistics, a broader concern emerges: *Australia is not simply experiencing increased international competition. It is facing simultaneous pressures on prospective student demand and the conversion of that demand into actual study opportunities.*

Australia's First-Choice Preference Falls From 31% to 24%

IDP Education's research reveals that Australia's share of first-choice international study destination preferences declined from **31% to 24% in six months**.

That represents a fall of seven percentage points, equivalent to a relative decline of approximately 22.6%.

Meanwhile, the United Kingdom and United States have narrowed Australia's lead, each reaching 21% of first-choice preferences.

Other findings from IDP's research are equally significant:

- **83%** of prospective international students are considering multiple countries before deciding where to study.
- **51%** of prospective and applied students report that their chances of obtaining a student visa strongly influence which destinations they consider.
- **47%** of applied students assess visa prospects before or during destination shortlisting.
- **59%** of prospective students would consider studying at an international branch campus, compared with 52% in the previous survey.
- **41%** identify generative artificial intelligence as a source of information when making international study decisions.
- **37%** consult education counsellors when evaluating their international study options.

These findings demonstrate an important change in student behaviour.

Students are no longer evaluating countries solely on university rankings, educational reputation or the availability of qualifications. Visa certainty, affordability, employment opportunities and the overall return on their educational investment increasingly influence their decisions.

For Australia, this presents a considerable challenge.

Department of Home Affairs Data: The Decline in Visa Grants

The September 2026 higher education visa figures attributed to the Department of Home Affairs paint an equally concerning picture.

The following comparison relates to offshore higher education student visa grants, not all student visas issued to nationals of these countries.

Country	September 2025	September 2026	Decline
India	1,422	190	86.6%
Nepal	1,074	87	91.9%
Bangladesh	730	14	98.1%
Bhutan	82	9	89.0%

Source: Department of Home Affairs student visa program data, as reported from its September 2026 statistical release. Individual country-level figures require final verification against the downloadable BP0015 dataset.

Consider Bangladesh.

In September 2025, Australia granted 730 offshore higher education student visas to Bangladeshi nationals. In September 2026, that figure reportedly fell to just 14.

That represents a **98.1% reduction in monthly grants**.

Nepal experienced a similarly substantial reduction, falling from 1,074 grants to 87.

India, one of Australia's most important international education source markets, recorded a decline from 1,422 to 190.

Across these four countries combined, the reported number of grants fell from 3,308 to just 300, a reduction of approximately **90.9%**.

These are not minor fluctuations. They represent significant changes in visa outcomes within a single year.

Applications Down 43%, Visa Grants Down 42%

The Department of Home Affairs' September data also indicates that, compared with September 2025:

- Offshore higher education student visa applications declined by approximately **43%**.
- Offshore higher education student visa grants declined by approximately **42%**.
- Reported offshore higher education visa refusal rates reached approximately **78% for Bangladesh and 83% for Nepal**.

These figures require careful interpretation.

A reduction in grants may reflect fewer applications, changes in application outcomes, changes in the composition of applicants, or a combination of these factors.

Similarly, monthly refusal rates should not be interpreted as the probability of refusal for every future applicant from a particular country.

Nevertheless, the scale of the changes deserves serious attention from universities, registered training organisations, education agents and policymakers.

Official Enrolment Data Shows the Pressure Is Already Visible

The Department of Education's international student statistics provide further context.

For the year to August 2026:

- Australia recorded **738,694 international students**, down 8% compared with the same period in 2025.
- International student enrolments declined by **9%**, to 866,252.
- International student commencements declined by **12%**, to 327,270.
- Vocational education and training enrolments declined by approximately **19%**.
- English Language Intensive Courses for Overseas Students (ELICOS) enrolments declined by approximately **24%**.
- Higher education enrolments declined by less than 1%.

These statistics demonstrate that the pressures are not uniform across the education sector.

The VET and ELICOS sectors have experienced much larger enrolment declines than higher education.

This distinction is essential when assessing the impact on CRICOS-registered providers and their future financial sustainability.

The Risk Australia Cannot Ignore

International education recruitment operates on long decision-making cycles.

Students and their families assess destinations, education providers, course fees, living expenses, visa eligibility and employment prospects long before arriving in Australia.

Education providers invest substantial resources in developing recruitment partnerships, maintaining international representation, conducting promotional activities and supporting prospective students through application processes.

When policy settings change, when visa outcomes become less predictable, or when students lose confidence in their prospects, that investment becomes harder to sustain.

Furthermore, once prospective students commit to another country, Australia cannot assume that those students will reconsider their decision simply because its policy settings subsequently change.

This is particularly relevant when IDP's research demonstrates that 83% of prospective students are considering multiple destinations.

Australia is no longer competing solely for students' interest. It is competing for their confidence.

What Should Australian Education Providers Do?

Education providers need to reassess their recruitment strategies using evidence rather than historical assumptions.

Recruitment diversification should be informed by academic demand, institutional capability, genuine student intentions and reliable visa outcome data. Excessive reliance on individual countries creates concentration risks, particularly where application outcomes change substantially.

Providers should also strengthen their assessment of prospective students' educational objectives, financial preparedness, English language proficiency and understanding of course requirements.

Education agents and admissions teams must provide current, accurate information about visa criteria without suggesting that any application is guaranteed to succeed.

Institutions should monitor country-specific conversion rates, visa decisions, student withdrawals and commencement outcomes to identify emerging recruitment risks.

For suitably positioned providers, offshore delivery, international partnerships and transnational education may provide opportunities to diversify educational operations, subject to applicable regulatory requirements.

However, recruitment diversification alone will not resolve broader questions about Australia's international education policy settings and global competitiveness.

A Question of Balance, Integrity and Confidence

Australia has legitimate responsibilities to maintain the integrity of its student visa system, address non-genuine applications and ensure that education providers deliver quality outcomes.

Strong regulation and responsible migration management remain essential.

However, policymakers must also consider whether frequent policy changes, uncertainty surrounding application outcomes and the cumulative impact of restrictions are affecting the confidence of genuine international students.

The available evidence does not establish that any single policy caused the reported decline in student preference or visa grants.

What it does demonstrate is that these developments are occurring together, at a time when students have increasing opportunities to consider alternative destinations.

> ***A country can maintain rigorous immigration standards while also providing transparent, predictable and fair pathways for genuine international students. These objectives should not be treated as mutually exclusive.***

Australia's International Education Reputation Cannot Be Taken for Granted

IDP Education's research and the Department of Home Affairs' visa statistics should prompt serious reflection across Australia's international education sector.

Australia's first-choice destination preference has declined from 31% to 24%.

Offshore higher education visa applications and grants have fallen sharply compared with September 2025.

Several established South Asian recruitment markets have experienced particularly substantial reductions in monthly visa grants.

Meanwhile, official Department of Education statistics confirm declining international student commencements and significant enrolment pressures in the VET and ELICOS sectors.

These developments cannot be dismissed as routine short-term fluctuations without further investigation.

Australia has invested decades in establishing its reputation as a high-quality international education destination.

Maintaining that reputation will require more than institutional marketing and recruitment campaigns.

It will require policy clarity, regulatory integrity, transparent visa processes, educational quality and sustained confidence among prospective students.

International students have choices. Australia must ensure genuine students continue to have sound educational reasons and confidence in the processes when choosing it.

The responsibility for undermining Australia's international education sector cannot be attributed to the Labor Government alone. The Coalition, Labor and other political parties must all accept responsibility for turning international education and migration into a political battleground. What we are witnessing is an increasingly damaging race to the bottom, where political parties compete to appear tougher on international students and migration, often without adequately considering the long-term consequences for universities, vocational education providers, employment, Australia's international reputation and the broader economy. Instead of developing a coherent, evidence-based and sustainable international education strategy, political debate has increasingly focused on restrictions, caps and deterrence. Australia's international education sector took decades to build into a globally respected industry, yet its reputation and competitiveness risk being eroded by short-term political positioning. International education should not become collateral damage in an electoral contest over who can impose the toughest migration restrictions.

Research and official statistical sources

1. IDP Education, *Emerging Futures 10: Voice of the International Student*, 27 October 2026.
2. Australian Government Department of Home Affairs, *Student Visa Program*, BP0015 visa lodgement, grant and grant-rate datasets, September 2026.
3. Australian Government Department of Education, *International Student Monthly Summary*, year to August 2026, updated 23 October 2026.

TRUTH, TRANSLATED

Truth, Translated: When Closing a Classroom Becomes a Crime

By Dr Sukh Rashpal Sandhu | Written for this edition

On 5 October 2026, the International Criminal Court made public arrest warrants for two Taliban ministers whose portfolios are schools and universities. It is rare, perhaps unprecedented, for the officials in charge of a country's education system to be wanted by an international court for the way they have used it. Here is what the warrants say, what they cannot do, and why they matter far beyond Afghanistan.

Why this matters

Education ministers do not usually appear in international criminal law. War crimes and crimes against humanity are associated with generals, militia leaders and heads of state. Ministers of education are associated with curriculum reviews, exam timetables and school funding formulas.

That is why the decision of the International Criminal Court (ICC) in October 2026 deserves attention. Judges have found reasonable grounds to believe that the men running Afghanistan's schools and universities are criminally responsible, alongside the Taliban's Supreme Leader and its Chief Justice, for the crime against humanity of persecution on gender grounds. Among the rights the court says girls and women have been deprived of is the right to education.

For readers in Australia, where the right of a girl to walk into a classroom is taken for granted, this is a story about how fragile that right can be, and about what the world can and cannot do when a government takes it away.

What the court actually did

On 5 October 2026, Pre-Trial Chamber II of the ICC issued a decision unsealing four arrest warrants in the Situation in Afghanistan. The warrants are against:

- **Haibatullah Akhundzada**, the Supreme Leader of the Taliban
- **Abdul Hakim Haqqani**, the Taliban's Chief Justice
- **Habibullah Agha**, the Taliban's Minister of Education
- **Neda Mohammad Nadim**, the Taliban's Minister of Higher Education.

The first two warrants were issued on 8 July 2025, and their existence was made public at the time. The warrants for the two education ministers were issued on 9 September 2025 and kept under seal until October 2026.

The Chamber found reasonable grounds to believe that all four are criminally responsible for having ordered, induced or solicited the crime against humanity of persecution under

article 7(1)(h) of the Rome Statute, the treaty that created the court. The alleged persecution was:

- on gender grounds, against girls, women and other people who do not conform with the Taliban's policy on gender, gender identity or expression
- on political grounds, against people perceived as "allies of girls and women".

The court says the alleged crimes have been committed in Afghanistan since the Taliban seized power on 15 August 2021, and continued until at least 20 January 2025.

The education link, in the court's words

The ICC's press release is unusually direct about what the Taliban did. The Chamber found that while the Taliban imposed rules on the whole population, they specifically targeted girls and women by reason of their gender. It said the Taliban severely deprived girls and women, through decrees and edicts, of rights including education, privacy and family life, and freedoms of movement, expression, thought, conscience and religion.

The Chamber also found that gender persecution covers not only direct violence but "systemic and institutionalised forms of harm", including discriminatory social norms imposed by authorities. That is the legal bridge between a classroom door and a criminal charge. A ban on girls attending school is not just a bad policy, on this reasoning. Imposed systematically by a government, as part of a wider pattern of severe rights violations connected to conduct such as imprisonment, torture and enforced disappearance, it can form part of a crime against humanity.

A short guide to the legal terms

International criminal law has its own vocabulary. Four terms explain most of what the court said.

- **Crime against humanity.** Under article 7 of the Rome Statute, certain serious acts become crimes against humanity when they are committed as part of a widespread or systematic attack directed against a civilian population. The word "attack" does not require a military assault. It can describe a course of conduct carried out under a government or organisational policy.
- **Persecution.** This is one of the acts listed in article 7. It means the intentional and severe deprivation of fundamental rights, contrary to international law, because of a person's identity as a member of a group. The grounds can include political, racial, national, ethnic, cultural, religious or gender grounds.
- **Gender persecution.** Persecution on gender grounds is expressly recognised in the Rome Statute. The Afghanistan warrants are among the most prominent uses of it, and the Chamber's reading of "gender" as including socially constructed roles and expectations is significant for future cases.
- **Ordering, inducing or soliciting.** These are forms of individual responsibility. The court is not alleging that education ministers personally committed every act of harm. It is alleging that they ordered or brought about the conduct, for example through decrees and directives.

Seen through these terms, the case is not about one decision to close a school. It is about a system of decisions, made over years, that the court considers part of a deliberate policy of excluding girls and women from public life.

What happened to Afghan girls' education

To understand the warrants, it helps to recall the timeline of the education bans, as widely reported at the time.

- **August 2021:** The Taliban returned to power as the previous government collapsed.
- **March 2022:** Secondary schools for girls were due to reopen. On the day, the Taliban reversed course, and girls above Year 6 were sent home. They have not been allowed back.
- **September and October 2022:** Habibullah Agha was appointed Minister of Education, and Neda Mohammad Nadim was appointed Minister of Higher Education.
- **December 2022:** Women were barred from attending university, a decision announced through the higher education ministry.
- **December 2024:** Reports emerged that women had also been barred from training in medical and nursing institutes, one of the last remaining pathways for women to gain professional qualifications.

The human cost is measured in millions of lives. In August 2024, UNESCO reported that at least 1.4 million girls had been deliberately denied access to secondary education since 2021, an increase of 300,000 since its previous count in April 2023. Counting girls who were already out of school before the bans, UNESCO estimated almost 2.5 million Afghan girls were out of school, about 80% of school-age girls in the country.

The damage did not stop with girls. UNESCO reported that primary enrolment had fallen from 6.8 million in 2019 to 5.7 million in 2022, meaning 1.1 million fewer girls and boys in primary school. University enrolment had fallen by 53% since 2021. A ban on female teachers teaching boys had made teacher shortages worse.

UNESCO's Director-General, Audrey Azoulay, said that in just three years the Taliban authorities had "almost wiped out two decades of steady progress".

Those are 2024 figures. By late 2026, a girl who was 12 when the secondary school ban began would be 16 or 17, and would have lost her entire secondary education. The longer the ban lasts, the more it shapes an entire generation.

The long road to these warrants

The ICC did not arrive here quickly.

Afghanistan joined the Rome Statute in 2003, which gives the court jurisdiction over crimes committed on Afghan territory or by Afghan nationals from 1 May 2003. A preliminary examination of the situation was made public in 2007. In November 2017, the Prosecutor asked judges for permission to open a full investigation into alleged crimes connected to the armed conflict.

The road was blocked and reopened several times. An investigation was authorised on appeal in March 2020. The then Afghan government asked the court to defer to national

investigations. After the Taliban took power, the Prosecutor asked to resume, and in October 2022 judges authorised the investigation to continue, finding Afghanistan was not carrying out genuine investigations of its own.

In November 2024, six countries, Chile, Costa Rica, Spain, France, Luxembourg and Mexico, formally referred the situation to the court. On 23 January 2025, the Prosecutor announced applications for arrest warrants against the Supreme Leader and the Chief Justice. Judges issued those warrants in July 2025, and the education ministers' warrants followed in September 2025.

What the warrants can do, and what they cannot

This is where plain language matters most, because international justice is often misunderstood in both directions.

What they cannot do

- **They do not reopen a single school.** No court order in The Hague changes a Taliban edict in Kabul.
- **They do not mean arrests are imminent.** The ICC has no police force. It relies on member states to arrest suspects who enter their territory. The four suspects are inside Afghanistan, where the Taliban are not cooperating with the court, and they are unlikely to travel to countries obliged to arrest them.
- **They are not convictions.** An arrest warrant means judges found "reasonable grounds to believe" a person is responsible. Guilt can only be decided at trial, and the ICC does not hold trials in absence of the accused.

What they can do

- **They restrict travel.** More than 120 countries are members of the court. Each is legally obliged to arrest a suspect found on its territory. That shrinks the world for the people named, including for diplomatic visits.
- **They change the conversation with the Taliban.** Governments seeking engagement with Afghanistan's rulers now do so knowing that the education ministers are subject to international arrest warrants. That raises the political cost of normalising the bans.
- **They create a legal record.** The court's findings, even at this early stage, set out in formal legal language that the denial of education to girls can form part of a crime against humanity. That record will outlast the current Taliban leadership.
- **They recognise victims.** For Afghan girls and women, many of whom have described feeling forgotten, an international court naming the officials responsible is a form of acknowledgement that the world has not looked away.
- **They extend the law.** The Chamber said that the Rome Statute's definition of gender must be read as going beyond a purely biological conception of sex, to include the social roles and expectations attached to it. That interpretation will matter in future cases worldwide.

Translating the competing claims

"This is Western interference in Afghan culture." *Misleading.* The charges are brought under a treaty Afghanistan itself joined in 2003. The right to education is recognised in international agreements that Afghanistan has also accepted. Many Muslim-majority countries educate girls and women at every level. The bans are a policy choice by the Taliban, not an expression of religion shared by Muslims generally.

"The warrants are pointless because no one will be arrested." *Too simple.* Arrests may be unlikely in the near term. But warrants have long lives. Leaders indicted by international courts have later been arrested after political circumstances changed, sometimes many years later. The warrants also have immediate diplomatic and legal effects.

"The ICC only targets weak countries." *Partly fair, but not here.* The court has faced serious criticism over where it focuses, and its Afghanistan investigation originally included alleged crimes by other parties to the conflict. Those criticisms deserve a serious answer. They do not change the evidence about what has happened to Afghan girls' education since 2021.

"Education is a domestic policy issue, not a crime." *Not always.* Most education decisions are domestic policy. But the court's reasoning is that a government which systematically bars half its population from learning, as part of a wider campaign of severe rights violations targeting them because of their gender, has crossed from policy into persecution.

What it means for Australia

Australia has a direct connection to this story.

Australian forces served in Afghanistan for two decades. Many Australians, military and civilian, worked alongside Afghans to build schools, train teachers and support girls' education. Thousands of Afghans have resettled in Australia since 2021, and many Afghan Australian families have daughters, sisters and nieces still inside the country who cannot study.

Australia is also a member of the ICC. That means it is legally obliged to cooperate with the court, including by arresting any of the four suspects should they enter Australian territory.

Australia has also taken its own steps. In September 2024, Australia joined Canada, Germany and the Netherlands in announcing an initiative to hold Afghanistan accountable for violating the Convention on the Elimination of All Forms of Discrimination against Women, a treaty Afghanistan has ratified. That is a separate track from the ICC, aimed at state responsibility rather than individual criminal responsibility, but it rests on the same facts.

The ICC's decision gives Australian policymakers three practical questions to consider:

1. **Pathways for Afghan women and girls.** Are Australian scholarship, humanitarian and family visa pathways giving meaningful priority to Afghan women and girls whose education has been cut off?
2. **Support for learning that continues.** UNESCO has reported on alternative learning programs, including radio and television content reaching an estimated 17 million Afghans and community programs across 20 provinces. Is Australia's aid program supporting education that reaches girls inside the country, in ways that keep them safe?
3. **Recognition of interrupted study.** Afghan women who arrive in Australia with incomplete qualifications deserve fair, efficient pathways to have prior learning recognised and to finish what they started. Australian universities, TAFEs and registered training organisations can play a real part here.

The wider lesson about education

There is a lesson in this story that reaches well beyond Afghanistan.

We tend to talk about education as a service: something governments fund, schools deliver and families consume. The Afghan experience is a reminder that education is also power. Whoever controls who may learn controls who may become a doctor, a lawyer, a teacher, a journalist, an engineer or a member of parliament. Denying education to girls is not simply a decision about schools. It is a decision about who will hold any kind of authority in a society for the next 50 years.

That is why the court's reasoning matters. It treats the closing of classrooms to girls not as an isolated policy but as part of a deliberate system for excluding them from public life. Once you see it that way, the link between a ministry of education and a crime against humanity becomes easier to understand.

What to watch next

The warrants are a beginning, not an end. Several developments over the coming months will show whether they make a practical difference.

1. **Travel by the named officials.** Any overseas trip by one of the four suspects, especially to a country that is a member of the ICC, will test whether member states are prepared to honour their legal obligations.
2. **Diplomatic engagement.** Watch how governments that have been moving towards closer dealings with the Taliban respond. Will they continue to meet the education ministers, or will they shift engagement to other officials?
3. **Further warrants.** The Prosecutor's investigation is continuing. The court has already shown that it is willing to keep warrants sealed for a time, so the four named may not be the last.
4. **The separate state case.** The initiative by Australia, Canada, Germany and the Netherlands under the women's rights convention could proceed independently, and would test state responsibility rather than individual guilt.
5. **Any change inside Afghanistan.** The most important measure of all is whether a single secondary school or university reopens its doors to girls and women. No legal process can substitute for that.

My view

In this newsletter's view, the October warrants are both important and insufficient.

They are important because they establish, in the language of international criminal law, that officials who use an education system to persecute girls can be held personally responsible. The officials named are no longer just ministers in a government that few countries recognise. They are suspects wanted by an international court. That message will be heard by every government that is tempted to restrict who may learn.

They are insufficient because no warrant teaches a single girl to read. The real test of the world's seriousness is not what happens in The Hague. It is whether governments, including Australia's, back the warrants with sustained pressure on the Taliban, support for education that still reaches girls inside Afghanistan, and open doors for Afghan women who make it out.

Accountability has two halves. One is naming those responsible. The other is repairing the harm. The ICC has done its part of the first. The second is up to the rest of us.

The bottom line

More than five years after the Taliban returned to power, Afghan girls above Year 6 remain shut out of school, and women remain shut out of university. On 5 October 2026, the International Criminal Court made public arrest warrants for the Taliban's Supreme Leader, its Chief Justice, and the two ministers responsible for education, for the crime against humanity of gender persecution.

Plain language for a complicated court decision: the world's main criminal court has said that closing classrooms to girls, as part of a system of persecution, can be a crime. That will not open the classrooms tomorrow. But it changes who is on the wrong side of the law, and it should change how every government deals with them.

Sources

- International Criminal Court, "ICC Pre-Trial Chamber II unseals four arrest warrants in Situation in Afghanistan", press release, 5 October 2026. https://www.icc-cpi.int/news/icc-pre-trial-chamber-ii-unseals-four-arrest-warrants-situation-afghanistan
- International Criminal Court, "Situation in the Islamic Republic of Afghanistan", situation page. https://www.icc-cpi.int/afghanistan
- International Criminal Court, "Situation in Afghanistan: ICC Pre-Trial Chamber II issues arrest warrants for Haibatullah Akhundzada and Abdul Hakim Haqqani", press release, 8 July 2025. https://www.icc-cpi.int/news/situation-afghanistan-icc-pre-trial-chamber-ii-issues-arrest-warrants-haibatullah-akhundzada
- International Criminal Court, "Statement of ICC Prosecutor Karim A.A. Khan KC: Applications for arrest warrants in the situation in Afghanistan", 23 January 2025. https://www.icc-cpi.int/news/statement-icc-prosecutor-karim-aa-khan-kc-applications-arrest-warrants-situation-afghanistan

- UNESCO, "Afghanistan: 1.4 million girls still banned from school by de facto authorities", 15 August 2024. https://www.unesco.org/en/articles/afghanistan-14-million-girls-still-banned-school-de-facto-authorities
- JusticeInfo.net, "ICC unseals arrest warrants for Taliban education ministers", 5 October 2026. https://www.justiceinfo.net/en?p=166507

TRUTH, TRANSLATED

Truth, Translated: The Strait That Runs Through Your Fuel Bill

By Dr Sukh Rashpal Sandhu | Written for this edition

Eight months after war closed the Strait of Hormuz, oil is moving again, but not normally, and Australia is still learning what it means to depend on a narrow waterway on the other side of the world. Here is the crisis in plain language, and the questions it leaves for a country that imports most of the fuel it burns.

A narrow stretch of water with a very long reach

Most Australians had never heard of the Strait of Hormuz until this year. Now it appears on the evening news, in petrol station conversations and in the Federal Budget.

The strait is a narrow channel between Iran to the north and Oman to the south. It is the only sea route out of the Persian Gulf. Before this year's war, it carried about 20 million barrels of oil a day, roughly a fifth of world oil consumption according to the US Energy Information Administration, and about a fifth of global trade in liquefied natural gas. Measured against seaborne oil trade alone, its share was more than a quarter. Either way, no other single stretch of water matters as much to the world's energy supply.

Australia does not buy much crude oil directly from the Gulf. That fact is often used to suggest the crisis is someone else's problem. It is not. Most of the refined fuel Australia imports comes from refineries in Asia, in places such as Singapore, South Korea and Malaysia, and those refineries depend heavily on Gulf crude. In 2024, about 84% of crude and condensate shipments through the strait went to Asian markets. When the strait closes, the refineries that supply our petrol and diesel feel it first, and we feel it shortly after.

How we got here: a short timeline

The detail of this war is complicated and still contested. The broad sequence, as documented in public reporting, runs like this.

- **28 February 2026:** The United States and Israel launched coordinated strikes on Iran. Within hours, Iranian state media said the strait had been shut, and tanker traffic through it collapsed.
- **Early March:** Insurers cancelled war-risk cover, which made transit effectively impossible for most commercial ships even where the water was physically open. Merchant ships were struck and mines were laid.
- **8 March:** Brent crude passed US$100 a barrel for the first time in more than three and a half years. March 2026 saw the largest monthly increase in Brent prices on record, about 63%.

- **8 April:** A temporary ceasefire between the United States and Iran was agreed, with reopening of the strait part of the deal. It did not hold. After talks in Islamabad failed, the US Navy began blockading Iranian ports on 13 April, while Iran kept the strait restricted, in effect a blockade on both sides.
- **4 May:** The United States launched an operation to escort merchant ships out of the Gulf. It was paused the next day amid talk of progress towards an agreement.
- **17 to 18 June:** The US and Iranian presidents signed a memorandum, agreed in Islamabad, intended to end the war and the blockades. Within days, Iran said it had closed the strait again, citing Israeli strikes in southern Lebanon.
- **8 July:** The interim truce broke down after attacks on commercial ships. Attacks continued through July and August.
- **Late August:** US officials, including the head of US Central Command, said Iranian mines had been cleared from the strait's main shipping lanes. Shipping bodies warned that the risk had not gone away.
- **Late August and September:** Strikes and counter-strikes continued. US forces struck Iranian launch sites in late August, and on 3 September Iran's army said it had launched drones and missiles at air bases in Kuwait and the United Arab Emirates.
- **October:** Ship attacks continued into October. Yet oil was flowing in greater volumes. Data from the analytics firm Kpler, reported in October, showed Gulf crude exports back at or above pre-war levels, helped by pipelines that bypass the strait and were carrying about 40% of the region's crude. Flows through Hormuz itself recovered but remained below pre-war levels. Shipping and insurance costs remained high.

So the plain-language summary for October 2026 is this: the strait is not closed, it is not safe, and it is not normal.

Why insurance can close a strait

One detail in that timeline explains a great deal. In early March, the strait was never physically sealed. Water does not close. What closed it, in practice, was insurance.

Commercial ships cannot sail without cover for damage to the vessel, injury to crew and harm to cargo or the environment. Extra war-risk premiums for the strait were already rising before the war, and in the first days of fighting they jumped to as much as 1% of a ship's value per transit. When insurers issued notices cancelling war-risk cover in early March, most owners simply could not send their ships through, whatever navies or governments said about the route being open.

This is why a partial recovery in traffic does not mean a return to normal costs. Every tanker that passes through still carries a higher insurance bill, and that cost is passed down the chain: to the refinery, to the importer, to the wholesaler and, eventually, to the person filling up a ute in a country town.

What it has cost ordinary people

Wars far away reach households through prices. In the United States, motoring body AAA reported record average diesel prices in September, above US$5.70 a gallon in the first week and higher still later in the month.

Australia felt the same pressure. In the first weeks of the war, pump prices surged, and the Commonwealth moved quickly:

- National Cabinet adopted a single **National Fuel Security Plan**, replacing what would otherwise have been nine separate state and territory responses. It has four levels of action. Australia moved to level two, under which motorists were asked to buy only what they needed and voluntarily use less.
- From 1 April, the Government **halved fuel excise for three months**, cutting the price of petrol and diesel by 26.3 cents a litre, and cut the heavy vehicle road user charge to zero. The Treasurer estimated the cost at about $2.55 billion.
- Temporary changes were made to fuel quality standards and to the minimum stocks fuel companies must hold, to give suppliers flexibility. Those measures were later extended to the end of September.

The excise relief ended in August. Energy Minister Chris Bowen ruled out an extension and called the relief "vital, but temporary". Australian Associated Press reported on 8 August that the national average price of unleaded had risen from $1.82 a litre in July to $2.09. Mr Bowen said prices were still about 50 cents lower than when the excise discount began in April.

One encouraging sign was behaviour at the bowser. The Motor Trades Association's Bruce Billson observed that motorists were not panic buying as they had in previous price spikes. That matters. Panic buying turns a tight supply into a local shortage overnight. Calm buying gives the system time to work.

How much fuel does Australia actually hold?

This is the question at the heart of the crisis, and the honest answer is: less than almost any comparable country.

As a member of the International Energy Agency (IEA), Australia is expected to hold oil stocks equal to at least 90 days of net imports. Australia has not met that benchmark for well over a decade. Estimates of Australia's emergency reserves before and during the crisis ranged between about 30 and 44 days, depending on what is counted. Part of the disagreement is methodological: some Australian figures include fuel on ships heading to Australia, which the IEA does not count.

What did the crisis do to those numbers? Government updates show stocks were tight at the start and then built up as imports were secured:

Point in the crisis	Petrol	Diesel	Jet fuel
Reported 13 March 2026	36 days	32 days	29 days
Update reported 8 August 2026	42 days	36 days	34 days

The August update also reported 42 ships heading to Australia with fuel, and three billion litres contracted for delivery over the following four weeks. Mr Bowen said Australia's fuel security had "remained stable and solid".

Both things can be true at once. The system did not run dry, and credit is due to the officials, importers, shipping companies and terminal operators who kept fuel moving. But the margin was thin. A month and a bit of diesel is not much when diesel runs trucks, tractors, mining equipment, generators, ambulances and the supply chains that stock every supermarket.

The response: a permanent reserve, at last

On 6 May, the Prime Minister announced what the Government called the Australian Fuel Security and Resilience package, worth more than $10 billion. Its main parts are:

- **An Australian Fuel Security Reserve:** $3.2 billion for a permanent, government-owned reserve of around one billion litres, focused on diesel and aviation fuel, and on preventing regional stockouts for essential users.
- **A Fuel and Fertiliser Security Facility:** $7.5 billion offering loans, equity, guarantees, insurance and price support to increase fuel and fertiliser supply and storage.
- **Higher minimum stockholding:** an increase of about 10 days of required holdings for every fuel type, with the stated aim of at least 50 days of onshore supply and storage of diesel and aviation fuel.
- **Refining studies:** $10 million, co-funded with states and territories, to study new or expanded refining capacity.

Mr Bowen noted that Australia was in a minority of IEA members without a national reserve. That alone tells you how exposed the country had allowed itself to become.

Critics were quick to respond. Climate Council chief executive Amanda McKenzie described it as a $10 billion plan for two weeks of fuel. Opposition Leader Angus Taylor said the Government was not going far enough and argued for raising stockholding requirements to meet the IEA's 90-day obligation.

What Australians think

Public opinion moved during the crisis. A Lowy Institute mini-poll, conducted from 18 May to 2 June and published on 22 June, asked whether Australians would favour the Government spending about $20 billion over four years to raise emergency fuel reserves to 90 days. Seventy-four per cent said they would be in favour. Twenty-four per cent said they would not. Two per cent were unsure.

Three in four Australians backing a $20 billion spend is a strong result in any policy area, let alone one that most voters had never thought about a year ago. It suggests the public understands something that policy settings had ignored for years: fuel security is not a technical niche. It is national security.

Translating the competing claims

Fuel security debates come with a lot of slogans. Here is a plain-language test of the most common ones.

"Australia is fine because we don't buy oil from the Middle East." *Misleading.* Australia's direct exposure to Gulf crude is limited, but most of the refined fuel we import comes from Asian refineries that depend on Gulf crude. When their inputs are disrupted, their output to us is disrupted too, and global prices rise for everyone.

"We have plenty of fuel because there are ships on the way." *Half true.* Fuel on ships is real fuel, and in this crisis the ships did arrive. But a ship at sea can be delayed, diverted or outbid by another buyer. That is precisely why the IEA does not count it. Reserves are what is in the tank when things go wrong.

"A $10 billion package fixes the problem." *Not yet.* It is the most serious response to Australia's fuel exposure in many years, and a permanent government reserve is overdue. But the stated target of at least 50 days remains well short of the international benchmark of 90 days. Building tanks, buying fuel and changing obligations will take years. The package should be judged on delivery, not announcement.

"Just reach 90 days immediately." *Easier said than done.* Holding more fuel requires storage that does not yet exist, fuel bought at high prices in a tight market, and ongoing costs to rotate stock before it degrades. Those are reasons to plan carefully. They are not reasons to settle for a permanent shortfall.

"The crisis is over because oil is flowing again." *Premature.* Gulf exports recovered to around pre-war levels by October, with producers relying heavily on routes that bypass Hormuz. But attacks on ships continued into October and costs remained high. A partial recovery under fire is not stability.

The wider lessons

Geography still matters

For years, globalisation encouraged a comforting assumption: if something is needed, the market will deliver it on time. That assumption works in peacetime. It fails when a chokepoint closes. Australia sits at the end of very long supply lines. The closure of one strait, many thousands of kilometres away, pushed up what Australians paid at the pump within weeks, from the capital cities to the most remote roadhouse.

Fuel is not the only exposure

The crisis also produced shortages and price spikes in fertiliser, aluminium and helium. The Government's decision to pair fuel with fertiliser in its new facility recognises that farmers need both, and that food prices follow fertiliser prices. Australians should expect more attention in coming years to other supply chains where the country relies on a small number of distant sources.

Electrification is also a security policy

One reason fuel security matters so much is that Australia's transport and freight systems run overwhelmingly on imported liquid fuels. Each electric vehicle charged from local generation, and each freight route that can shift to rail, slightly reduces that dependence. This is not a substitute for reserves in the short term. But over a decade, the less fuel a country has to import, the less any single strait can hurt it.

Diplomacy is part of the supply chain

Australia is not a party to this war, and it has limited leverage over its course. But the country has an interest in de-escalation, in freedom of navigation, and in agreements such as the June memorandum being honoured by all sides. Australia's relationships with Gulf states, with Asian refining nations and with partners who patrol sea lanes are not abstract foreign policy. They decide whether fuel reaches our terminals.

My view: the accountability test

In this newsletter's view, the most important thing about the Hormuz crisis for Australia is not what happened in March. It is what happens next, once the headlines fade.

Australia's shortfall against the IEA benchmark is not new. It has been reported, debated and reviewed for years. Successive governments of both major parties accepted the risk because fuel was cheap and supply lines were calm. It took a war to produce a permanent government reserve.

The real test is whether the commitments survive the return of normal prices. Voters should watch for four things:

1. **Delivery dates.** When will the billion-litre reserve actually be filled, and where will it be stored?
2. **Transparent reporting.** Will the Government keep publishing regular, plain figures on days of petrol, diesel and jet fuel, using the IEA's method as well as Australia's own, so that the public can see whether the position is really improving?
3. **The path to 90 days.** Is there a published plan, with costs and timelines, to meet the international benchmark, or is 50 days quietly treated as good enough?
4. **Regional protection.** The reserve is meant to protect essential users in the regions. How will that work in practice for remote communities, farms and emergency services the next time supply tightens?

The bottom line

The Strait of Hormuz is a long way from Australia. But in 2026 it has run straight through household budgets, freight costs, farm inputs and the Federal Budget.

The good news is that the system held. Fuel kept arriving, motorists stayed calm, and the Government has committed real money to a permanent reserve. The less comfortable news is that Australia entered this crisis with thinner buffers than almost any of its peers, and even after the new package it will still fall short of the international standard.

Plain language for a complicated war: we did not run out, but we found out how close we could come. The lesson should not have to be learned twice.

Sources

- US Energy Information Administration, "Amid regional conflict, the Strait of Hormuz remains critical oil chokepoint", Today in Energy, 16 June 2025. https://www.eia.gov/todayinenergy/detail.php?id=65504

- S&P Global, "Iran claims Hormuz is shut down after IRGC threat to shipping", 28 February 2026. https://www.spglobal.com/energy/en/news-research/latest-news/crude-oil/022826-iran-claims-hormuz-is-shut-down-after-irgc-threat-to-shipping-tasnim
- Al Jazeera, "Maritime insurers cancel war risk cover in Gulf: will it spike energy costs?", 3 March 2026. https://aljazeera.com/amp/economy/2026/3/3/maritime-insurers-cancel-war-risk-cover-in-gulf-will-it-spike-energy-cost
- Associated Press via Coeur d'Alene Press, "Crude oil prices surpass $100 a barrel as the Iran war impedes production and shipping", 8 March 2026. https://cdapress.com/news/2026/mar/08/crude-oil-prices-surpass-100-a-barrel-as-the-iran-war-impedes-production-and-shipping/
- DTN, "Brent, WTI post record monthly, quarterly rise on war", 31 March 2026. https://www.dtnpf.com/agriculture/web/AG/news/article/2026/03/31/brent-wti-record-monthly-q1-rise-war
- The Jakarta Post, "US military to block ships from Iranian ports after talks yield no agreement", 13 April 2026. https://www.thejakartapost.com/world/2026/04/13/us-military-to-block-ships-from-iranian-ports-after-talks-yield-no-agreement.html
- The Defense Post, "US pauses Hormuz escorts in bid for deal, as threats continue", 6 May 2026. https://thedefensepost.com/2026/05/06/us-pauses-hormuz-escorts/
- Al Jazeera, "What the Trump-Iran agreement says about Lebanon, Hormuz and uranium", 18 June 2026. https://www.aljazeera.com/amp/news/2026/6/18/what-the-trump-iran-14-point-plan-says-about-lebanon-hormuz-and-uranium
- Bloomberg, "US-Iran truce collapses as attacks worsen, blockade restarts", July 2026. https://news.bloomberglaw.com/international-trade/us-iran-truce-collapses-as-attacks-worsen-and-blockade-returns
- Janes, "CENTCOM commander says mines cleared from Hormuz shipping lanes", August 2026. https://www.janes.com/defence-intelligence-insights/defence-news/defence/centcom-commander-says-mines-cleared-from-hormuz-shipping-lanes
- Al Jazeera, "Why Hormuz remains high risk for ships despite US claims of mine-clearing", 26 August 2026. https://aljazeera.com/news/2026/8/26/why-hormuz-remains-high-risk-for-ships-despite-us-claims-of-mine-clearing
- Shafaq News, "Iran strikes US bases in Kuwait and UAE", September 2026. https://shafaq.com/en/Middle-East/Iran-strikes-US-bases-in-Kuwait-and-UAE
- Gulf News, "Tankers keep moving as Gulf oil exports clear pre-war mark: Kpler", 5 October 2026. https://gulfnews.com/business/tankers-keep-moving-as-gulf-oil-exports-clear-pre-war-mark-kpler-1.500698455
- KEYC News, "AAA reports record gas and diesel prices heading into Labor Day weekend", 4 September 2026. https://www.keyc.com/2026/09/05/aaa-reports-record-gas-diesel-prices-heading-into-labor-day-weekend/
- Region, "Government scrambles to boost fuel supply as Iran war bites at the bowser", 13 March 2026. https://region.com.au/government-scrambles-to-boost-fuel-supply-as-iran-war-bites-at-the-bowser/949993/
- Region, "Fuel excise, heavy vehicle road user charge slashed for three months", 30 March 2026. https://region.com.au/fuel-excise-heavy-vehicle-road-user-charge-slashed-for-three-months/954260/

- Argus Media, "Australia extends fuel stockpile relief to September", 2026. https://www.argusmedia.com/en/news-and-insights/latest-market-news/2833587-australia-extends-fuel-stockpile-relief-to-september
- Prime Minister of Australia, "Government securing more fuel reserves: the Australian Fuel Security and Resilience package", media release, 6 May 2026. https://www.pm.gov.au/media/government-securing-more-fuel-reserves-australian-fuel-security-and-resilience-package
- International Energy Agency, "Australian Fuel Security and Resilience package", policy database entry, 2026. https://www.iea.org/policies/31814
- RenewEconomy, "National fuel reserve future proofed in $10 billion plan, but critics say it is junk logic", 6 May 2026. https://reneweconomy.com.au/national-fuel-reserve-future-proofed-in-10-billion-plan-but-critics-say-it-is-junk-logic/
- Lowy Institute, Charles Lyons-Jones, "Fuel security: Iran war boosts support for domestic reserves", 22 June 2026. https://www.lowyinstitute.org/publications/2026-lowy-institute-poll/fuel-security-iran-war-boosts-support-for-domestic-reserves
- Australian Associated Press via Wellington Times, "Labor backs strong fuel supply as petrol prices bite", 8 August 2026. https://www.wellingtontimes.com.au/story/9326264/labor-backs-strong-fuel-supply-as-petrol-prices-bite/

TRUTH, TRANSLATED

Truth, Translated: When the Floodwaters Reached Parliament

By Dr Sukh Rashpal Sandhu | Written for this edition

In September 2026, a former Speaker of the Philippine House of Representatives, and a cousin of the sitting President, was arrested on a plunder charge linked to flood control projects. It is one of the most significant accountability moments in our region in years. Here is how a scandal about drains and dykes reached the top of Philippine politics, what is alleged and what has been proven, and what Australia can learn from it.

Why this matters

The Philippines is one of Australia's closest neighbours and partners. More than 400,000 Australians have Filipino heritage. The two countries train together militarily, trade together and share an interest in a stable, well-governed region.

It is also a country that floods. Typhoons and monsoon rains strike every year, and low-lying cities such as those around Manila Bay are especially exposed. Flood control is not an abstract budget line. It is the difference between a family's home staying dry or going under.

That is why the flood control scandal has struck such a nerve. It is not about money disappearing in some distant office. It is about money that was meant to protect people from water, and allegations that much of it was diverted while communities continued to flood.

How the scandal began

The scandal surfaced in mid-2025, and it began, unusually, with the President himself.

In his State of the Nation Address on 28 July 2025, President Ferdinand Marcos Jr. spoke about more than 5,500 flood control projects and vowed to expose and prosecute corruption. In August 2025, he presented audit findings that about ₱100 billion, roughly a fifth of flood control spending, had gone to just 15 contractors. He also launched a public complaints website called "Sumbong sa Pangulo", which means "Report to the President". It drew thousands of complaints within weeks, many from citizens reporting projects that appeared not to exist.

The term that then entered public debate was "ghost projects": public works that were paid for, at least on paper, but never built, or built so poorly that they failed. Officials from the Department of Public Works and Highways acknowledged in a Senate inquiry that there were possible ghost projects in the province of Bulacan.

What followed was a cascade:

- **September 2025:** Contractors gave evidence at Senate and House inquiries. A contractor couple linked to multiple companies testified about bidding practices and, in a House hearing on 8 September, implicated senior politicians in alleged kickbacks. These were allegations, and those named denied wrongdoing.
- **8 September 2025:** Francis Escudero was removed as Senate President, following reports linking a major campaign donor to a company tied to questioned projects.
- **11 September 2025:** President Marcos created an Independent Commission for Infrastructure to investigate.
- **17 September 2025:** Martin Romualdez resigned as Speaker of the House. He has denied wrongdoing.
- **21 September 2025:** Large protests against corruption took place in Manila and other cities.
- **October 2025:** The Department of Justice issued immigration lookout orders covering Mr Romualdez, several sitting and former senators and others.
- **November 2025:** The Independent Commission and the Department of Public Works and Highways jointly recommended plunder, graft and bribery charges against Mr Romualdez and former congressman Zaldy Co, who had chaired the House appropriations committee.
- **December 2025:** The Department of Public Works and Highways recommended charges including plunder, malversation, graft and bribery against 87 people, including Mr Romualdez and Mr Co.

The Finance Secretary estimated that ghost flood control projects may have cost the economy between ₱42.3 billion and ₱118.5 billion between 2023 and 2025, an estimate he said rested partly on anecdotal accounts. The country's anti-money laundering authorities froze billions of pesos in assets linked to the investigations.

What happened in 2026

The Independent Commission completed its work and turned over its evidence to the Office of the Ombudsman, the Philippines' main anti-corruption prosecutor, in March 2026, having made referrals covering 65 people.

Then the cases began to reach the Sandiganbayan, the special court that hears corruption cases against public officials.

- **January 2026:** The Ombudsman filed graft and malversation charges against a former senator and former public works engineers over a ₱92.8 million project in Bulacan that investigators described as a ghost project.
- **May and June 2026:** The Ombudsman filed plunder, bribery and graft charges against Senator Jinggoy Estrada and a former Public Works Secretary over alleged kickbacks from Bulacan projects. Plunder arrest warrants were issued on 1 June, and both were taken into custody and detained.
- **July 2026:** An Ombudsman investigation reportedly described Mr Romualdez as a "central figure" in the scheme, and the Ombudsman said it was very close to filing plunder charges.

- **7 September 2026:** The Ombudsman filed the plunder case at the Sandiganbayan, which issued arrest warrants for Mr Romualdez, Mr Co and two others. Mr Romualdez was arrested that night while confined at a hospital in San Juan, Metro Manila.
- **14 September 2026:** After doctors found his condition stable, the Sandiganbayan ordered him committed to the Quezon City Jail as a detention prisoner, and set his arraignment for 16 September.

The plunder case reportedly involves more than ₱7 billion in alleged kickbacks. Mr Romualdez has maintained his innocence. He said he respected the court's decision and would answer the charges before the proper court. Mr Co, a co-accused, remains at large.

A short glossary

Philippine accountability has its own institutions and terms. Four are essential to following this story.

- **Plunder.** Under Philippine law, plunder is a grave offence committed when a public officer amasses ill-gotten wealth through a series or combination of corrupt acts, above a threshold of ₱50 million. Because of its seriousness, a plunder charge where the evidence of guilt is strong can mean detention without bail while the case is heard.
- **The Ombudsman.** The Office of the Ombudsman is the constitutional body that investigates and prosecutes public officials for corruption. It decides whether to file charges.
- **The Sandiganbayan.** This is a special court that hears corruption cases against public officials. It issues warrants, decides on bail and conducts trials.
- **Ghost project.** A public works project that exists on paper, with payments made, but was never built, or was built so far below specification that it provides little or none of the promised protection.

How a kickback scheme in public works typically works

It also helps to understand, in general terms, how corruption in infrastructure spending tends to operate anywhere in the world. Nothing in this description is a finding about any individual in the Philippine cases.

A legislator or official secures funding for a project, often through a late addition to the budget. The contract goes to a favoured contractor, sometimes through bidding in which related companies compete against one another to create the appearance of competition. A share of the contract value is returned to those who arranged the funding. To make the numbers work, the contractor cuts corners, builds less than specified, or builds nothing at all. Because the project is in a flood plain, a remote area or simply out of sight, the failure may not be noticed until the next flood.

That is why the audit of physical works, not just financial records, matters so much. Paper can be made to balance. A flood wall either exists or it does not.

Allegation, charge, conviction: the vital difference

Plain language requires precision here, because this is exactly where public debate tends to go wrong.

1. **An allegation** is a claim, such as testimony at a Senate hearing that a politician received cash. It may be true or false. It proves nothing on its own.
2. **A recommendation** is when an investigating body, such as the Independent Commission, says charges should be laid. It is a judgement about the evidence, not a verdict.
3. **A charge** is when a prosecutor, here the Ombudsman, formally accuses a person in court. It means the prosecutor believes there is enough evidence for a case.
4. **A conviction** is when a court, after a trial, finds the person guilty beyond reasonable doubt.

As of October 2026, Mr Romualdez and others in this scandal are at stage three. They are charged. They are not convicted. Every person accused is entitled to the presumption of innocence, and some may be acquitted. The value of the process lies precisely in the fact that the outcome is not decided in advance.

What has been established officially is different. State auditors have produced findings on specific projects, including fraud audit reports on projects in Bulacan referred to the Ombudsman. During bail proceedings in 2026, judges of the Sandiganbayan reportedly inspected the claimed site of one Bulacan project and found no evidence that it existed. Those are observations about projects. They are not, on their own, findings that any particular politician is guilty of anything.

Why this is remarkable

The Philippines has a long and painful history with political corruption, and with powerful families who have seemed beyond the reach of the law. Several features of this case stand out.

The accused is very senior. Mr Romualdez served as Speaker of the House from 2022 to 2025, one of the most powerful positions in the country. He is a first cousin of President Marcos. In many political systems, including some in our region, that kind of family connection has been enough to stop an investigation in its tracks.

The process involved many institutions. The scandal was exposed through a combination of presidential action, state audit, Senate and House inquiries, an independent commission, the Ombudsman, a specialist anti-corruption court, the anti-money laundering council, investigative journalists and ordinary citizens filing complaints. No single institution did it alone.

Citizens played a direct role. The complaints website, public protests and local reporting of failed or missing projects created pressure that politicians could not ignore.

Detention has been real, not symbolic. In past scandals, powerful defendants have often remained free for years while cases crawled through the courts. In this case, the court ordered the former Speaker held in an ordinary city jail once doctors found him medically stable, alongside other high-profile plunder detainees. Whatever one thinks of detention before trial, it sent a message that rank alone would not buy special treatment. For many Filipinos who have watched earlier cases fade away, that image mattered.

There are also reasons for caution. Investigations of this kind can be shaped by politics, and critics in the Philippines have questioned whether all those implicated are being pursued with equal energy. Two of its three commissioners resigned during its work, one reportedly for health reasons, and a special adviser stepped down amid questions about a possible conflict of interest. The commission's mandate ended in March 2026. A key co-accused remains at large. And the cases themselves will take years to resolve. Plunder trials in the Philippines have historically been long, and outcomes have sometimes disappointed those who demanded accountability.

Translating the competing claims

"Everyone in politics is corrupt, so nothing will change." *Cynical and unsupported.* A former Speaker and a sitting senator have been arrested and detained on plunder charges. Whatever the eventual verdicts, that is a real change from impunity. Cynicism helps the corrupt, because it persuades the public that nothing can be done.

"He has been arrested, so he is guilty." *False.* Arrest and detention follow a charge. Guilt can only be determined by a court after trial.

"This is just political revenge." *Not established.* Political motives are always worth scrutinising. But the case rests on audit findings, testimony and evidence gathered by several institutions over more than a year. The proper place to test whether it holds up is the court.

"It's a Philippine problem, not ours." *Too comfortable.* The specific allegations are Philippine. The underlying risk, that infrastructure spending flows to favoured contractors or electorates with weak oversight, exists in every country, including Australia.

What Australia can learn

Australia is not the Philippines. Its institutions, history and scale of alleged wrongdoing are very different, and it would be wrong to suggest equivalence. But infrastructure and grants spending raise similar accountability questions everywhere, and Australia has had its own uncomfortable moments.

In 2020, the Australian National Audit Office reported serious problems with how a federal sports grants program had been administered, finding that the process had favoured certain electorates in ways not supported by the program's own assessment. In 2021, the Audit Office reported similar concerns about a commuter car park fund. Neither case involved findings of personal corruption, and they are not comparable in scale or nature to what is alleged in the Philippines. But both showed how public money for public works can be steered by political considerations unless processes are transparent and enforced.

Four lessons stand out.

1. Make spending visible

The Philippine scandal was exposed partly because citizens could see, or not see, the projects they had paid for. Australia should publish project-level data on major infrastructure and grants spending in a form ordinary people can search, including what was promised, what was paid and what was delivered.

2. Audit offices need teeth and funding

State auditors were central to exposing the Philippine projects. In Australia, the Auditor-General's reports on grants administration have been among the most important accountability documents of the past decade. Audit bodies must be funded to do performance audits, not just financial ones, and governments must respond to their findings.

3. Independent investigators must be truly independent

The Philippine Independent Commission lost several members during its work, and questions about independence followed it. Integrity bodies everywhere, including Australia's own national and state anti-corruption commissions, depend on appointment processes and conflict of interest rules that are robust and transparent.

4. Let the courts do their job

Public pressure exposed the scandal. But only courts can decide guilt. Australia's commitment to the presumption of innocence and to fair trials is a strength, and it applies to politicians as much as anyone else.

What to watch next

The arrest is the start of a long legal process. Readers who want to judge whether accountability is real should watch five things over the coming year.

1. **The pace of the trials.** Will the Sandiganbayan move the plunder cases forward steadily, or will they stall in procedural delays, as some past cases have?
2. **Bail decisions.** Courts will decide whether the evidence of guilt is strong enough to justify continued detention. Those decisions will be an early signal of how the evidence is viewed.
3. **The co-accused abroad.** Whether Philippine authorities can secure the return of Mr Co will be a test of international cooperation and of the government's resolve.
4. **Equal treatment.** Critics will watch whether investigations extend evenly to all those named in testimony, including figures close to the current administration, or stop at politically convenient targets.
5. **Recovery of funds.** Frozen assets are not recovered assets. The public will want to know how much of the money is returned and whether it is spent on the flood protection it was meant to fund.

My view

In this newsletter's view, the arrest of a former Speaker on a plunder charge is a test, not a triumph.

It is a test of whether the Philippine justice system can try powerful people fairly and in reasonable time. It is a test of whether the government will pursue all those implicated with the same vigour, regardless of family or political alliance. And it is a test of whether the money, the billions of pesos that were meant to keep families safe from floods, can be recovered and spent on the protection it was supposed to buy.

The deeper lesson is about trust. When people see public works that were paid for but never built, while their own homes flood, they stop believing that government is on their side. That loss of trust is the true cost of corruption, and it is much harder to recover than any frozen bank account.

For Australians watching from nearby, the right response is neither smugness nor despair. It is attention. Accountability is not a permanent achievement in any country. It is a habit that must be practised, defended and funded, year after year.

The bottom line

A scandal about flood control projects has reached the very top of Philippine politics. A former Speaker and cousin of the President has been charged with plunder, arrested and detained, alongside other senior figures. He maintains his innocence, and the courts will decide.

Plain language for a complicated scandal: the floods exposed what audits and inquiries had been warning about, and the justice system has now taken over. Whether that ends in convictions, acquittals or a long stalemate, the region is watching to see whether the law in the Philippines can reach anyone, however powerful. Australia should watch closely too, and remember that the best protection against this kind of scandal is spending that everyone can see.

Sources

- GMA News, Joahna Lei Casilao, "Martin Romualdez jailed in QC Jail in Payatas", 14 September 2026. https://www.gmanetwork.com/news/topstories/nation/1002373/martin-romualdez-in-quezon-city-jail-in-payatas/story/
- GMA News, "Martin Romualdez arrested over plunder charges, says DILG chief", 7 September 2026. https://www.gmanetwork.com/news/topstories/nation/1001505/martin-romualdez-arrested-over-plunder-charges-says-dilg-chief/story/
- Daily Tribune, "Ombudsman files plunder charges vs Romualdez, Co", 7 September 2026. https://tribune.net.ph/2026/09/07/ombudsman-files-plunder-charges-vs-romualdez-co
- Rappler, Jodesz Gavilan, "Ombudsman probe tags Romualdez as 'central figure' in flood control corruption scheme", 20 July 2026. https://www.rappler.com/philippines/ombudsman-investigation-martin-romualdez-central-figure-flood-control-corruption/
- Philstar, "Plunder raps vs Romualdez 'very close' to being filed", 18 July 2026. https://www.philstar.com/headlines/2026/07/18/2542879/plunder-raps-vs-romualdez-very-close-being-filed/amp/
- SunStar, "Jinggoy Estrada ordered arrested for plunder", 1 June 2026. https://www.sunstar.com.ph/manila/jinggoy-estrada-ordered-arrested-for-plunder
- Philstar, "Graft raps filed vs Revilla, 6 ex-DPWH officials over Bulacan flood control project", 16 January 2026.

https://www.philstar.com/headlines/2026/01/16/2501433/graft-raps-filed-vs-revilla-6-ex-dpwh-officials-over-bulacan-flood-control-project
- Daily Tribune, "Pandi, Bulacan ghost project inspection", 15 April 2026. https://tribune.net.ph/2026/04/15/pandi-bulacan-ghost-project-inspection
- Philstar, "ICI seeks closure after 9 referrals covering 65 people", 13 March 2026. https://www.philstar.com/headlines/2026/03/13/2514056/ici-seeks-closure-after-9-referrals-covering-65-people
- Philippine Daily Inquirer, "DPWH, ICI push plunder raps vs Romualdez, Co", November 2025. https://newsinfo.inquirer.net/2144459/dpwh-ici-push-plunder-raps-vs-romualdez-co
- GMA News, "Commissioner Fajardo resigns from ICI", December 2025. https://www.gmanetwork.com/news/topstories/nation/970802/commissioner-fajardo-resigns-from-ici/story
- GMA News, "BI receives DOJ lookout bulletin order on Romualdez, Escudero, Estrada, Villanueva, Revilla, Binay", October 2025. https://www.gmanetwork.com/news/topstories/nation/961742/bi-receives-doj-lookout-bulletin-order-on-romualdez-escudero-estrada-villanueva-revilla-binay/story/
- GMA News, "Ghost flood projects caused economic loss, says DOF", September 2025. https://www.gmanetwork.com/news/money/economy/957738/ghost-flood-projects-economic-loss-dof/story/
- Rappler, Dwight de Leon, "Martin Romualdez formally resigns, Isabela's Bojie Dy is new House speaker", 17 September 2025. https://www.rappler.com/philippines/romualdez-resigns-bojie-dy-new-house-speaker/
- Australian National Audit Office, "Award of Funding under the Community Sport Infrastructure Program", Auditor-General Report No. 23 of 2019 to 20, January 2020. https://www.anao.gov.au/work/performance-audit/award-funding-under-the-community-sport-infrastructure-program

TRUTH, TRANSLATED

Truth, Translated: Meta's Year in Court, and a US$25 Billion Lesson in Broken Promises

By Dr Sukh Rashpal Sandhu | Written for this edition

In just over seven months, Meta lost a jury trial over child safety, was declared a public nuisance, agreed to a multistate settlement worth up to US$16.68 billion, and was ordered to pay US$25 billion for misleading Facebook users about their data. Here is what happened, what it means, and why Australians should pay attention.

Why this matters

For most of the past two decades, the largest technology companies have operated on a simple bet: move fast, grow first, and deal with regulators and courts later. When fines came, they were usually small compared with revenue and treated as a cost of doing business.

2026 is testing that bet. In a series of decisions from March to October, courts and state governments in the United States moved from warnings to consequences, with Meta, the owner of Facebook, Instagram and WhatsApp, at the centre.

None of this happened in Australia. But Australians use the same apps, are subject to the same design choices, and have their own regulators trying to answer the same questions. What happens to Meta in a New Mexico courtroom tells us a great deal about what is possible, and what remains unresolved, everywhere else.

Case one: the child safety trial

The jury verdict (March 2026)

New Mexico's Attorney General, Raúl Torrez, sued Meta over the safety of children on its platforms. The case went to trial in Santa Fe, and on 24 March 2026 a jury found that Meta had violated the state's Unfair Practices Act. The jury found that Meta misled the public about the risks its platforms posed to young users' mental health and to their risk of sexual exploitation.

The jury imposed the maximum penalty allowed under the law, US$5,000 per violation, for a total of US$375 million in civil penalties. Meta said it disagreed with the verdict and would appeal.

The public nuisance ruling (August 2026)

The jury decided only the consumer protection claims. A separate question went to the judge alone: whether Meta's platforms had created a public nuisance in New Mexico.

After a trial without a jury, Chief Judge Bryan Biedscheid of the First Judicial District ruled on 6 August 2026 that Meta had created a public nuisance. He wrote that New Mexico "is in the midst of a teen mental health crisis affecting public health and public safety."

The judge ordered Meta to pay US$567 million into an abatement fund to address harms to young people in the state. The fund is to support treatment, awareness and prevention, and ongoing monitoring. Meta's obligations last five years, and it must report in writing every six months on its progress. Together with the jury's penalties, Meta's financial obligations in the case came to about US$942 million.

Two parts of the reasoning deserve attention.

First, Section 230. In the United States, Section 230 of the Communications Decency Act broadly protects online platforms from liability for content posted by their users. Meta argued it barred the state's claim. The court disagreed, finding that Section 230 did not preclude the public nuisance claim. Reporting on the ruling explains the reasoning: the state was targeting how Meta's platforms were designed and operated, not trying to hold Meta liable as the publisher of other people's posts.

Second, the limits of the court. New Mexico had asked the court to force changes to features such as infinite scroll and autoplay. The judge declined. He reasoned that regulating industry-wide features of that kind was a job for legislators or the executive government, warned that ordering one company to change them could competitively damage its platforms, and noted possible conflicts with free speech protections and Section 230.

That is an important signal. Courts can punish deception and order remedies for harm. But a single court is reluctant to redesign the basic mechanics of social media for one company. If those features are to change across the industry, the law itself has to change.

The Attorney General's office said the order "requires real, structural changes, not just promises". Meta said it remained confident in its record of protecting teens and would appeal.

Case two: the 29-state settlement

What happened (August 2026)

Meta's largest legal exposure on youth harm was not in New Mexico. It was in a federal court in Oakland, California, where a coalition of states had sued the company in 2023. The states alleged that Meta designed Facebook and Instagram to be addictive for children, misled consumers about safety, and breached the Children's Online Privacy Protection Act by collecting children's data without parental consent.

The case went to trial before Judge Yvonne Gonzalez Rogers. On 26 August 2026, during the second week of trial, Meta agreed to settle with the 29 states involved. The case was co-led by the attorneys general of California, Colorado, Kentucky and New Jersey.

The money

Court papers set a maximum of US$16.68 billion. Meta's own description put the package at about US$18 billion, paid in annual instalments over ten years, and described a wider group of attorneys general. The two descriptions have not been fully reconciled in public reporting, so the safest statement is that the settlement is worth up to US$16.68 billion on the court papers.

According to Meta, roughly 70% is a base amount for participating states, while about 30% is contingent and would be released only if YouTube and TikTok adopt comparable measures and pay matching amounts. That condition comes from Meta's own account. Meta said it expected to record a legal expense of roughly US$10 billion in its third quarter.

Meta did not admit wrongdoing. It denied the allegations while agreeing to settle, and criticised the states' demands as excessive.

The product changes

For families, the more important part of the settlement may be what changes on the apps. The court filing describes nationwide daily usage limits and nighttime blocks for teenagers, enhanced age assurance and additional parental tools.

Meta's own description is more specific:

- a two-hour daily limit for under-18s across Instagram and Facebook combined
- a night mode from midnight to 6am
- a school mode muting notifications from 8am to 3pm.

Direct messages are excluded from all three. The protections apply to under-18s in participating states and remain subject to court approval through a proposed consent judgment.

Look closely at that list and a plain-language point emerges. A company that for years argued it could not reasonably limit how long teenagers spent on its apps has now agreed, in writing, to do exactly that. The technology was always available. What changed was the legal cost of not using it.

Case three: the US$25 billion privacy penalty

Back to Cambridge Analytica

The largest number of the year came from a case most people thought was history.

In 2018, the world learned that a personality quiz app had harvested data from roughly 87 million Facebook profiles, and that the data had been passed to Cambridge Analytica, a political consulting firm that used it for targeted political advertising. Regulators around the world, including in Australia, took action against Facebook over the affair.

New Mexico filed its own lawsuit in 2021. The state argued that Facebook had repeatedly told users they controlled their data, and that those statements were false. Among the evidence was a 2010 opinion piece in The Washington Post in which Mark Zuckerberg wrote that Facebook did not and would never sell users' data.

The verdict and the penalty

In September 2026, a jury found Meta liable for more than 43 million violations of New Mexico's consumer protection law. Jurors examined 34 separate statements about privacy and content moderation. They did not find that the state had proved false claims about removing harmful content, including COVID-19 misinformation.

At US$5,000 per violation, the theoretical maximum penalty exceeded US$219 billion. New Mexico asked for between US$35 billion and US$40 billion. Meta argued for no more than about US$3.4 billion, saying the jury had made no findings that any New Mexican heard or saw the statements or was harmed by them.

On 21 October 2026, Judge Francis Mathew of the First Judicial District ordered Meta to pay US$25 billion. He found the deception intentional, writing: "Facebook promised users that they (the users) controlled their data." And then: "This was false." Interest accrues while any appeal runs. Mr Torrez said the money would go to a fund for the state's education system.

The Associated Press described it as the biggest fine ever imposed on Meta, and AdExchanger as the largest ever against any technology company.

Meta's response

Meta will appeal. Its chief legal officer, C.J. Mahoney, described the case as an attempt to "impose a tax on speech" and said the company was confident it would win. Meta argues that the penalty is out of proportion and that the jury made no findings that any New Mexican heard or saw the statements or was harmed by them.

Those arguments deserve a fair hearing. A penalty is not final until appeals are exhausted, and appellate courts often reduce large awards. But the finding of intentional deception was made after a full trial, and it will shape how other courts and regulators view the company's past promises.

Putting the numbers in perspective

Big numbers can blur. Here is the year in one table.

Date	Case	Outcome	Status
24 March 2026	New Mexico child safety (jury)	US$375 million civil penalties	Meta appealing
6 August 2026	New Mexico child safety (judge)	Public nuisance; US$567 million abatement fund over five years	Meta appealing
26 August 2026	29-state youth harm case, Oakland	Settlement worth up to US$16.68 billion, teen limits	Pending court approval
21 October 2026	New Mexico privacy deception	US$25 billion penalty	Meta appealing

Now the other side of the ledger. The US$25 billion order came hours before Meta reported its third-quarter results. According to AdExchanger, revenue for that single quarter rose 26% year on year to US$64.2 billion, of which US$63.1 billion came from advertising.

In other words, what has been described as the largest penalty ever imposed on a technology company equals roughly 40% of Meta's revenue for three months. That is a serious sum. It is not an existential one.

Translating the competing claims

"These cases prove social media causes the teen mental health crisis." *Overstated.* The New Mexico jury found that Meta misled the public about risks, and a judge found its platforms created a public nuisance in that state. Those are legal findings on the evidence in those cases. Researchers still debate how much social media causes, as opposed to accompanies, poor mental health in young people. The courts did not settle that scientific question, and it is not fair to claim they did.

"Meta has admitted it harmed children." *False.* Meta did not admit wrongdoing in the 29-state settlement and is appealing the New Mexico rulings.

"The fines are meaningless to a company this rich." *Partly true.* A single penalty, even US$25 billion, can be absorbed. But taken together, these cases mean billions in payments, years of court-supervised reporting, and enforceable limits on how teenagers use the apps. That combination changes behaviour more than any single fine.

"This is just an American story." *False.* The design features at issue are the same wherever the apps are used, including Australia. And the legal theories tested in 2026, that platform design can be challenged separately from content, and that privacy promises are enforceable consumer promises, will be studied by regulators worldwide.

"A tax on speech." *Contested.* Meta argues that penalising its public statements burdens free expression. The court's view was that this was a consumer protection case about false statements to users regarding their data. Honest descriptions of a product's privacy settings are not the kind of speech consumer law has ever protected from scrutiny.

What it means for Australia

Australia has taken its own path on these issues. Since 10 December 2025, major social media platforms have been required to take reasonable steps to prevent Australians under 16 from holding accounts. Australia's privacy regulator pursued Facebook over Cambridge Analytica in the Federal Court, a case that ended in a settlement. Debates about privacy law reform, a children's online privacy code and a digital duty of care continue in Canberra.

The American cases offer three lessons for Australian policymakers.

1. Design is a legitimate target

The New Mexico court allowed a challenge to how Meta's platforms were built, rather than to what users posted. That distinction matters in Australia too. Much of the online safety debate here has focused on harmful content. The 2026 American cases suggest that features such as notifications, time limits and default settings can be regulated directly, and that companies can implement such limits when required to.

2. Legislators cannot outsource the job to courts

The judge in New Mexico explicitly declined to order industry-wide changes to infinite scroll and autoplay, saying that was a task for legislators or the executive. That is a reminder that courts can punish and remedy, but cannot write coherent rules for an industry. If Australia wants consistent standards across all platforms, Parliament and regulators must set them.

3. Privacy promises should be enforceable

The US$25 billion penalty rests on a simple idea: if a company tells users they control their data, that promise must be true. Australia's privacy law reforms should be judged on whether they make companies' public privacy claims enforceable in practice, with penalties large enough to matter to the world's biggest firms.

What families can take from this

The court cases are about law and money, but the questions they raise land at the kitchen table. Without offering medical or parenting advice, a few plain observations follow from the evidence and the settlement terms.

- **Time limits are now an industry-accepted idea.** Meta's own settlement describes daily limits, night modes and school modes as reasonable protections. Families who set similar rules at home are not being unreasonable. They are applying the same logic the company has now agreed to.
- **Notifications are a design choice.** Much of the public nuisance case was about how platforms are built to keep people engaged. Turning off non-essential notifications, especially overnight, is one of the simplest changes any user can make.
- **Settings change, so check them.** Platforms update their teen protections regularly, and many of the changes in the American settlement apply only in participating states. Australian families should look at what protections are actually switched on in the apps their children use, rather than assume.
- **Privacy statements are worth reading.** The US$25 billion penalty turned on what Facebook told users about who could see their data. It is worth knowing what an app says it collects and shares, and noticing when that changes.

My view

In this newsletter's view, the most important number of Meta's year is not US$25 billion, or US$16.68 billion, or US$567 million. It is two hours.

A two-hour daily limit, a night mode and a school mode are modest changes. Many parents have tried to impose them at home and lost the battle against apps designed to be hard to put down. Now one of the world's largest companies has agreed to build those limits into its products for millions of teenagers in the participating states. That is what accountability looks like when it works: not just a payment, but a change in how the product behaves.

There are reasons for caution. The penalties may be reduced on appeal. The settlement's protections still need court approval and exclude direct messages. Other platforms are not bound. And none of this applies automatically in Australia.

But the direction is clear. For years, the technology industry argued that design choices were neutral, that privacy statements were aspirational, and that harms were for users and parents to manage. In 2026, courts in the United States rejected each of those arguments, at least in part. The era of "move fast and break things" is being replaced, slowly and expensively, by an era of "say what you do, and do what you say".

The bottom line

Meta's year in court was the most significant legal reckoning yet for a social media company. A jury found it misled the public about risks to children. A judge declared its platforms a public nuisance. It agreed to a settlement worth up to US$16.68 billion with time limits for teenagers. And it was ordered to pay US$25 billion for telling users they controlled their data when, the court found, they did not.

Plain language for a complicated set of cases: the fines grab the headlines, but the real change is that promises made to users are now being treated as promises that can be enforced. Australia should take note, and make sure its own laws can do the same.

Sources

- The 74, "New Mexico judge orders Meta to pay $567M for youth harm abatement fund", 7 August 2026 (republished from Source New Mexico, 6 August 2026). https://www.the74million.org/article/new-mexico-judge-orders-meta-to-pay-567m-for-youth-harm-abatement-fund/
- Tech Policy Press, "New Mexico court orders Meta to establish $567 million fund to abate harms to youth", August 2026. https://www.techpolicy.press/new-mexico-court-orders-meta-to-establish-567-million-fund-to-abate-harms-to-youth/
- NPR via HPPR, "New Mexico jury says Meta harms children's mental health and safety, violating state law", 24 March 2026. https://www.hppr.org/npr-news/2026-03-24/new-mexico-jury-says-meta-harms-childrens-mental-health-and-safety-violating-state-law
- The Next Web, "Meta will pay up to $16.68bn to settle the 29-state youth safety case", 26 August 2026. https://thenextweb.com/news/meta-16-68bn-settlement-29-states-youth-safety
- Associated Press via ABC7, "Judge orders Meta to pay $25 billion for violating New Mexico law in the Cambridge Analytica data breach", 21 October 2026. https://abc7news.com/19965355/
- AdExchanger, "Meta's $25 billion privacy fine in New Mexico is a big number. But is it a big deal for ad tech?", October 2026. https://www.adexchanger.com/privacy/metas-25-billion-privacy-fine-in-new-mexico-is-a-big-number-but-is-it-a-big-deal-for-ad-tech/
- New Mexico Department of Justice, "The New Mexico Department of Justice secures another landmark victory against Big Tech, with historic $25 billion penalty against Facebook", media release, 21 October 2026. https://nmdoj.gov/press-release/the-

new-mexico-department-of-justice-secures-another-landmark-victory-against-big-tech-with-historic-25-billion-penalty-against-facebook/

- Associated Press via WCAX, "Meta ordered to pay New Mexico $25 billion for deceiving users about privacy on Facebook", 22 October 2026. https://www.wcax.com/2026/10/22/meta-ordered-pay-new-mexico-25-billion-deceiving-users-about-privacy-facebook/

STAY CONNECTED

Follow us on LinkedIn

Enjoyed this edition? Each of these newsletters publishes new pieces on LinkedIn. Subscribe, like and share to read them first, and join the conversation in the comments.



Truth, Translated You are reading this newsletter

Plain language for a complicated world: education, geopolitics, political accountability and Big Tech.

Subscribe on LinkedIn

https://www.linkedin.com/newsletters/truth-translated-7450724196525035520/



Letters of the Heart

Real stories, timeless wisdom, and soul-deep inspiration.

Subscribe on LinkedIn

https://www.linkedin.com/newsletters/letters-of-the-heart-7329273590376210432/



The Hope Dispatch

Uplifting news, inspiring stories, and positive change from around the world.

Subscribe on LinkedIn

https://www.linkedin.com/newsletters/the-hope-dispatch-7338912777081638914/



The HealthTech Herald

The latest breakthroughs at the intersection of health and technology.

Subscribe on LinkedIn

https://www.linkedin.com/newsletters/the-healthtech-herald-7338913774701027328/



Connecting the Dots

Where compliance, risk management, digital innovation, and bottom-line growth intersect.

Subscribe on LinkedIn

https://www.linkedin.com/newsletters/connecting-the-dots-7397392757360648192/

Follow the author: Dr Sukh Rashpal Sandhu on LinkedIn

BACK PAGE

About Truth, Translated

Truth, Translated is a LinkedIn newsletter written by Dr Sukh Rashpal Sandhu. Plain language for a complicated world. Clear takes on education, geopolitics, political accountability and Big Tech.

Read and subscribe

New editions continue to be published on LinkedIn. Search for Truth, Translated on LinkedIn to subscribe.

Disclaimer

The views in this collection are the author's own. Pieces are reproduced as first published, and facts, figures and links are current at their original publication date. Nothing in this collection is legal, financial, medical, migration or regulatory advice.

Copyright

Copyright Dr Sukh Rashpal Sandhu 2026. All rights reserved. Images are reproduced as they appeared in the original posts.

Truth, Translated | Dr Sukh Rashpal Sandhu | sukh@sukhsandhu.com

Masthead

Author: Dr Sukh Rashpal Sandhu

Publisher: Dr Sukh Rashpal Sandhu

Edition: 4, October 2026

Contact: sukh@sukhsandhu.com

Truth, Translated is published on LinkedIn by Dr Sukh Rashpal Sandhu. This edition collects the pieces in the order they were first published, with their original images.