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**CHANAKYA IAS ACADEMY
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Health Ministry set to roll out free HPV vaccination plan targeting girls aged 14

Bindu Shajan Perappadan
NEW DELHI

The Union Health Ministry is set to launch a nationwide Human Papillomavirus (HPV) vaccination programme targeting girls aged 14.

The vaccination will be voluntary and free of cost, ensuring equitable access across socio-economic groups.

India will use Gardasil, a quadrivalent HPV vaccine, for protection from HPV types 16 and 18, which cause cervical cancer, and types 6 and 11.

"Global and Indian scientific evidence confirms that a single dose provides robust and durable protection when administered to girls in the recommended age group," a senior Health Ministry official said.

"The nation-wide programme will target girls aged 14 years, an age at which the HPV vaccine offers maximum preventive benefit, well before potential exposure to the virus," they said.

To ensure uninterrupted availability and quality, India has secured HPV vaccine supplies through a transparent, globally supported procurement mechanism.

"Under India's partnership with Gavi, the Vaccine Alliance, Gardasil vaccines, which are approved by India's drug regulator and widely used internationally, have been made available for the national programme. The procurement follows stringent quality and cold chain standards, enabling the government to provide the vaccine free of cost to eligible girls across all States and Union Territories," the official said.

Safety shot

The Centre's nation-wide HPV vaccination programme targeting girls aged 14 will begin soon.

• A single-shot of Gardasil, a vaccine that provides protection against HPV types 16 and 18, which cause cervical cancer, and types 6 and 11 will be used.

• The vaccination will be voluntary and free of cost. It will be administered exclusively at designated government health facilities.

• Cervical cancer remains the second most common cancer among women in India.

HPV vaccination under the national programme will be conducted exclusively at designated government health facilities, including the Ayushman Arogya Mandirs (Primary Health Centres), Community Health Centres, Sub-District and District Hospitals, and Government Medical Colleges. Each vaccination session will be carried out in the presence of trained medical officers, supported by skilled healthcare teams, and equipped for post-vaccination observation and management of any rare adverse events.

Common ailment

Cervical cancer remains the second most common cancer among women in India, with nearly 80,000 new cases and over 42,000 deaths reported annually. Scientific evidence establishes that almost all cases of cervical cancer are caused by persistent infection with high-risk types of HPV, particularly HPV types 16 and 18, which together account for more than 80% of cervical cancer cases in India.

Despite being largely preventable through vaccination and early screening, cervical cancer continues to impose a heavy burden on women and families.

"The forthcoming HPV vaccination programme directly addresses this challenge by preventing HPV infection before it can progress to cancer," the Health Ministry said.

HPV vaccines are among the most extensively studied vaccines worldwide, with evidence demonstrating 93-100% effectiveness in preventing cervical cancer caused by vaccine-covered HPV types. The vaccine is non-live, does not cause HPV infection, and has a good safety record, supported by more than 500 million doses administered globally since its introduction in 2006.

Meanwhile, globally, over 90 countries are implementing single-dose HPV vaccination schedules, improving coverage and affordability. Several countries have already demonstrated substantial reductions in HPV infection, precancerous lesions, and cervical cancer incidence following widespread vaccination.

India's approach is grounded in global best practices, national disease burden evidence, and expert recommendations of the National Technical Advisory Group on Immunisation, a Health Ministry official said.

- ~80,000 new cases annually.
- ~42,000 deaths annually.

Vaccine Features:

- Non-live recombinant vaccine.
 - Single-dose schedule supported by global evidence.
 - 93-100% effectiveness against vaccine-covered HPV types.
 - Over 500 million doses administered globally since 2006.
- Target Age: 14 years (before potential exposure).

Static Linkages

- Article 21 – Right to Life includes right to health (judicial interpretation).
- Article 47 – Duty of the State to improve public health.
- Universal Immunisation Programme (UIP).
- National Health Policy 2017 – Focus on preventive healthcare.
- SDG 3 – Good Health and Well-being.
- WHO's Cervical Cancer Elimination Strategy (90-70-90 targets).

Critical Analysis

Positives

- Preventive public health approach.
- Reduces long-term cancer burden.
- Promotes gender equity.
- Cost-effective compared to cancer treatment.
- Strengthens primary healthcare infrastructure.

Challenges

- Vaccine hesitancy and misinformation.
- Cultural stigma around sexually transmitted infections.
- Ensuring cold-chain logistics in remote areas.
- Need for parallel screening (Pap smear/HPV DNA testing).

Way Forward

- Integrate HPV vaccination with school health programmes.
- Strengthen awareness campaigns to reduce stigma.
- Ensure strong AEFI (Adverse Events Following Immunisation) surveillance.
- Expand cervical cancer screening coverage.
- Encourage domestic vaccine manufacturing.

KEY HIGHLIGHTS

Context of the News

- The Union Health Ministry will launch a nationwide Human Papillomavirus (HPV) vaccination programme for 14-year-old girls.
- Vaccination will be voluntary and free of cost across all States and UTs.
- India will use Gardasil (quadrivalent vaccine).
- Procurement secured through partnership with Gavi, the Vaccine Alliance.
- Programme based on recommendations of the National Technical Advisory Group on Immunisation (NTAGI).
- Vaccination to be administered at government facilities including Ayushman Arogya Mandirs, CHCs, District Hospitals, and Government Medical Colleges.

Key Points

- HPV (Human Papillomavirus):
 - Sexually transmitted virus.
 - High-risk types 16 & 18 cause over 80% of cervical cancer cases in India.
 - Types 6 & 11 cause genital warts.
- Cervical Cancer (India):
 - Second most common cancer among women.

Panel to probe repeated failures of PSLV, says ISRO

Jacob Koshy
NEW DELHI

A committee that includes K. Vijay Raghavan, former Principal Scientific Adviser, and S. Somanath, former Chairman, India Space Research Organisation (ISRO), will probe "systemic issues" underlying the successive failures of the ISRO's Polar Satellite Launch Vehicle (PSLV).

While technical committees probe and submit "failure analysis reports" when mishaps occur, this committee, *The Hindu* has reliably learnt, will investigate questions on whether "organisational" problems may have played a role in the debacles involving the PSLV.

On January 12, the PSLV-C62 failed in its mission to deliver 16 satellites into orbit, and crashed into the sea after the third stage of the rocket failed to ignite. This was similar to the May 18, 2025 failure of the PSLV-C61, in which, too, the third stage failed to



On January 12, the PSLV-C62 failed in its mission to deliver 16 satellites into orbit as the rocket failed to ignite in the third stage. PTI

fire, destroying as a result the EOS-09 satellite intended for the government's strategic needs.

The committee members consist of experts who are external to the ISRO, and are expected to table their findings to ISRO Chairman V. Narayanan before April.

On February 3, *The Hindu* reported that National Security Adviser Ajit Doval, who is also a member

of India's Space Commission, visited the Vikram Sarabhai Space Centre, reportedly in connection with the failure of the PSLV-C62 mission.

"A national-level expert committee has been constituted and is reviewing the reason for the anomaly in the PSLV vehicle," the ISRO said in a statement to *The Hindu*.

The PSLV's failures would be the core focus of

the report, and the committee would be looking into the processes in the manufacture, procurement, and assembling of various components of the rocket. This has implications for other rockets, too, *The Hindu* was told, because they have commonalities.

Report in a week

India's space ecosystem now involves several private companies and, therefore, the probe will not only be about which part or component failed, and who was responsible, but also whether there is a process in place to fix accountability, and how it may be improved.

A technical committee of the ISRO will first table a report on the PSLV-C62 incident this week, *The Hindu* has learnt through reliable sources.

The ISRO's historical response to rocket failures has been to have a Failure Analysis Committee probe the reasons, and publicise its findings. This, however,

has not taken place in the case of both the PSLV-C61 and PSLV-C62.

The Failure Analysis Committee report of the May 18 mishap was sent to the Prime Minister's Office before the PSLV-C62 launch, but its details have not been made public.

The Failure Analysis Committee, constituted by the ISRO Chairman, is a body of experts within ISRO to lead in the event of a major incident. It is expected to reconstruct the chain of events leading up to a failure, and recommend corrective action before the rocket is cleared to fly again. The committee members include experts within ISRO as well as relevant experts from academia.

At a press conference on February 2, the Union Minister of State for Science and Technology, and Earth Sciences, Jitendra Singh, said that a "third party appraisal" was ongoing.

(With inputs from Hemant C.S. in Bengaluru)

KEY HIGHLIGHTS

Context of the News

- Successive failures of Polar Satellite Launch Vehicle (PSLV) missions:
 - PSLV-C61 (May 2025) – Third stage ignition failure; EOS-09 satellite lost.
 - PSLV-C62 (January 2026) – Third stage failed to ignite; 16 satellites lost.
- A high-level external committee constituted including:
 - K. Vijay Raghavan, former Principal Scientific Adviser.
 - S. Somanath, former ISRO Chairman.
- Committee to examine systemic/organisational issues beyond technical faults.
- "Third-party appraisal" mentioned by Union Minister.
- Implications for broader space ecosystem including private sector participation under Indian Space Policy 2023.

Key Points

- PSLV:
 - Four-stage launch vehicle (solid-liquid-solid-liquid configuration).
 - Known as ISRO's "workhorse".
 - Used for Sun-synchronous and polar orbit missions.
- Third stage (solid propellant) critical for achieving required velocity.
- Failure Analysis Committee (FAC):
 - Traditionally constituted internally by ISRO.
 - Recommends corrective measures before next launch.
- Indian Space Policy 2023:
 - Encourages private participation.

- IN-SPACe as regulatory and facilitation body.

- Space is under Union List → Executive authority of Union government.

Static Linkages

- Union List – Space and scientific institutions.
- Executive power of Union (Article 73).
- Public procurement and accountability mechanisms.
- Strategic sector governance.
- Role of Space Commission & Department of Space.
- National security dimension of satellite infrastructure.

Critical Dimensions

- Transition from state-led to public-private space ecosystem increases:
 - Supply-chain complexity.
 - Need for quality control.
 - Clear liability framework.
- Transparency concerns:
 - Non-public release of Failure Analysis reports.
- National security implications of repeated launch failures.
- Organisational vs technical failure – governance reforms needed.
- Impact on India's commercial launch credibility globally.

Way Forward

- Strengthen third-party technical audits.
- Institutionalised transparency in failure reports.
- Robust quality assurance across private supply chain.
- Clear liability and accountability norms under space reforms.
- Capacity-building in mission-critical systems.
- Strengthen Space Commission oversight mechanisms.

An Israel visit — its strategic, economic, regional impact

The West Asian region is starting at the possibility of its worst ever military conflict with one of the largest American military buildups in the Persian Gulf. Iran is defiant and has refused to bow down to 'unreasonable demands' from the United States. Concurrently, in Gaza, although the ceasefire has held since October 2025, the prospects of lasting peace still look remote. In addition, emerging fault lines in the region are drawing allies such as the United Arab Emirates (UAE) and Saudi Arabia into opposing military blocs.

In the midst of such an uncertain security situation, Prime Minister Narendra Modi is set to undertake a two-day visit to Israel (February 25-26, 2026). This will be Mr. Modi's second visit to Israel, following his historic first visit in July 2017 — the first by any Indian Prime Minister. Notably, this is a standalone visit with no engagement with Palestinian Authority leadership, highlighting India's success in "de-hyphenating" its Israel engagement.

The question, however, that arises is why this visit? What role can India play in this fragile security situation in the region? With India and Israel facing similar security threats, how can they take this very important partnership forward?

Convergence in a security partnership
Surrounded by hostile neighbours and as victims of frequent terror attacks, both countries have often sought convergence on security and defence issues. According to the Stockholm International Peace Research Institute (SIPRI), India has been Israel's largest defence customer for several years, accounting for about 34% of Israel's total arms exports between 2020 and 2024. The cooperation has gradually progressed from imports to joint development and technology collaboration.

Over the past few decades, Israel has provided India with a number of cutting-edge technologies, weapon and surveillance platforms such as unmanned aerial vehicles, missiles, special forces equipment and radar systems. The Barak-8 air and missile defence system, co-developed by India and Israel, is one such success story. During Israel Defence Minister Benjamin Gantz's visit to New Delhi in June 2022, there was the 'India-Israel Vision on Defence Cooperation' for enhancing cooperation in the field of futuristic defence technologies. In November 2025, India and Israel signed an agreement to deepen cooperation in defence, industry and technology, including the sharing of advanced systems to support joint development and production.

For India, there were lessons from its experience in Operation Sindoor (May 2025) — the need for a strong and impenetrable air (including anti-drone) and missile defence shield under Mission 'Sadashan Chakra'. There are inputs that there could be special focus on it during Mr. Modi's visit including the procurement and co-production of the 'Iron Beam' — a



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100kW-class high energy laser system capable of intercepting drones, rockets, and mortars efficiently and cost-effectively. There are also reports that Autonomous Guard, an Israeli company, has signed a deal with an Indian private defence firm valued at approximately \$51.9 million, which would cover the supply of advanced surveillance and threat-detection systems, specialising in sensor-based observation technologies.

The science, technology and innovation link
India has benefited immensely from Israel's success in modern technology and innovations, especially in agriculture, water and electronics. There are more than 35 Centres of Excellence (CoE) in India which are focused in high quality and high-density production of flowers, vegetables, fruits (mango, citrus, litchi, date palm, pomegranate), and beekeeping. Water management technologies too are critical, especially with many water-scarce areas in India. MASHAV, Israel's Agency for International Development Cooperation under Israel's Ministry of Foreign Affairs, signed agreements with Haryana in June 2022 and Rajasthan in December 2024 to collaborate on integrated water resource management and capacity building. With Artificial Intelligence (AI) rapidly emerging as a key driver of modern technology, it is expected to become a focus area in future bilateral cooperation and innovation initiatives.

Israel-India bilateral trade is often overshadowed by security cooperation. It, however, remains a significant pillar of engagement. India is Israel's second-largest trading partner in Asia, with bilateral trade reaching \$3.75 billion in FY2024-2025. While merchandise trade continues to be dominated by diamonds, petroleum and chemicals, the partnership is expanding into electronics, high-tech products, communications and medical equipment.

In September 2025, during the visit of Israeli Finance Minister Bezalel Smotrich, India and Israel signed a Bilateral Investment Agreement. This was followed by the signing of the Terms of Reference for a Free Trade Agreement (FTA) during Commerce and Industry Minister Piyush Goyal's visit to Israel in November 2025. With India having recently concluded several significant trade deals, the FTA with Israel could gain the necessary momentum during Mr. Modi's visit. Israel is also keen to establish arrangements and exemptions for Indian infrastructure companies to participate in building critical roads and ports. Additionally, similar to India's agreement with Russia, Israel may pursue a deal to facilitate "human mobility" to attract skilled Indian talent.

Another key aspect to watch during the Modi visit is the progress of the India-Middle East-Europe Economic Corridor (IMEC). Announced at the G20 Summit in Delhi in September 2023, this intercontinental connectivity project holds strategic significance

for both countries. Although the Gaza conflict had temporarily stalled the initiative, there is now a renewed sense of urgency to advance it. Recent trade agreements with the European Union, Oman, and the UAE are expected to boost trade in both value and volume, creating the need for a shorter and safer transport route. With the Suez Canal route vulnerable to disruptions from regional conflicts, IMEC could provide an alternative, secure corridor to Europe. But achieving lasting peace in Gaza remains crucial for the project's success.

Gaza peace process and regional dynamics
Discussion on the Gaza peace process is a definite likelihood. During the recent 'Summit' of the Board of Peace, presided over by U.S. President Donald Trump on February 19, 2026, more than 50 countries participated, with some pledging \$7 billion in funding and others committing troops to the International Stabilisation Force. India attended as an observer and has not yet defined its role in the process. Given India's strong ties with both the Gulf region and Israel, discussions may include potential avenues for India's involvement in Gaza.

Both leaders are also expected to discuss regional dynamics in depth, including developments in Iran, given the potential implications of conflict for India and the wider region, particularly with regard to India's energy security. India's hosting of the 2nd India-Arab Foreign Ministers' Meeting (IAFMM), in January 2026, along with Mr. Modi's visits to Jordan and Oman (December 2025), and the visit of the UAE President in January 2026, demonstrate the careful balance that India has forged in the region. This sets the stage for a constructive and realistic discussion on various regional issues during the visit.

Ahead of the Modi visit, Prime Minister of Israel Benjamin Netanyahu tweeted this: "we will create a 'hexagon' of alliances around or within the Middle East. This includes India, Arab nations, African nations, Mediterranean nations (Greece and Cyprus), and nations in Asia...The intention here is to create an axis of nations that see eye-to-eye on the reality, challenges and goals against the radical axes, both the radical Shiite axis, which we have struck very hard, and the emerging radical Sunni axis."

India, however, does not necessarily see things in the region from this lens. How India reacts to such a proposal, given how close India's ties are with countries in the region, will also be a thing to be watched.

Mr. Modi's visit is being closely watched, as India and Israel are at pivotal points in their journeys. Despite domestic differences, the two have built a strong strategic partnership over the past decade. Mr. Modi's address to the Knesset — a privilege usually reserved for U.S. Presidents — and his visit to a Jerusalem innovation centre highlight the visit's significance. It is far more than routine diplomacy, with potential long-term implications for both countries and the region.

2. Economic & Trade Relations

- Bilateral trade: ~\$3.75 billion (FY 2024–25).
- Dominant sectors:
 - Diamonds, petroleum products, chemicals.
- Emerging sectors:
 - Electronics, medical devices, communication technology.
- September 2025:
 - Bilateral Investment Agreement signed.
- November 2025:
 - Terms of Reference signed for Free Trade Agreement (FTA).
- Infrastructure collaboration and skilled mobility discussions underway.

3. Science, Agriculture & Water Cooperation

- 35+ Centres of Excellence (CoEs) in India:
 - High-density horticulture.
 - Precision agriculture.
- Cooperation in:
 - Drip irrigation.
 - Water management technologies.
- Agreements with:
 - Haryana (2022) and Rajasthan (2024) for Integrated Water Resource Management.
- Future focus:
 - Artificial Intelligence and high-tech innovation ecosystems.

4. Geopolitical Dimensions

- India balancing ties with:
 - Israel
 - Gulf countries (UAE, Saudi Arabia, Oman)
 - Iran
- IMEC (India–Middle East–Europe Economic Corridor):
 - Announced at G20 Delhi Summit 2023.
 - Alternative to Suez Canal route.
 - Dependent on regional stability.
- India attended Gaza Peace Summit (2026) as observer.

Static Linkages

- Strategic Autonomy as core of India's foreign policy.
- West Asia supplies over 50% of India's crude oil imports.
- Defence indigenisation under Atmanirbhar Bharat.
- Multi-alignment diplomacy in a multipolar world.
- Connectivity corridors as goeconomic tools.

KEY HIGHLIGHTS

Context

- Heightened instability in West Asia due to:
 - U.S.–Iran tensions and military buildup in the Persian Gulf.
 - Fragile Gaza ceasefire (since October 2025).
- PM Narendra Modi's two-day standalone visit to Israel (Feb 25–26, 2026).
- Continuation of India's "de-hyphenation policy" — separate engagement with Israel and Palestine.
- Visit occurs amid revival of IMEC and evolving regional alignments.

Key Points

1. Defence & Security Cooperation

- As per SIPRI:
 - India accounted for ~34% of Israel's arms exports (2020–2024).
- Major joint projects:
 - Barak-8 surface-to-air missile system.
- Focus areas:
 - Air and missile defence systems.
 - Anti-drone technologies.
 - Laser-based systems (Iron Beam).
- Shift from import-based model to joint development and co-production.
- Alignment with:
 - Atmanirbhar Bharat in defence.
 - Defence Technology and Trade Initiative (DTTI-like model cooperation).

The Prime Minister's visit will help deepen engagement with Tel Aviv, going far beyond routine diplomacy.

Critical Dimensions

Opportunities

- Strengthening air and missile defence architecture.
- Advancing defence indigenisation and technology transfer.
- Enhancing food and water security through Israeli technology.
- Expanding India's geoeconomic footprint via IMEC.
- Positioning India as a stabilising middle power.

Challenges

- Risk of alienating Iran amid U.S.–Iran tensions.
- Managing Arab sensitivities over Gaza.
- IMEC viability linked to sustained regional peace.
- Avoiding bloc politics (e.g., proposed “hexagon” alliance).

Way Forward

- Maintain strategic autonomy and balanced diplomacy.
- Accelerate joint R&D in defence and AI.
- Fast-track FTA negotiations.
- Leverage agricultural and water cooperation for climate resilience.
- Support inclusive regional peace initiatives without military entanglement.

India's trade strategy in a multipolar world

India's recent global trade strategy aims to boost exports and strengthen its position as a leading global trade partner. This has resulted in ambitious free trade agreements and a stronger presence in key international economic forums. In 2023, India updated its Foreign Trade Policy (FTP) with the goal of increasing exports to \$2 trillion by 2030, reinforcing a framework of strategic autonomy that supports sovereign decision-making while engaging major global powers. According to the Department of Commerce's 2025 Year-End Review, India recorded a 6.05% annual increase in total exports – merchandise and services combined – reaching \$825.25 billion.



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over 90% of traded goods, boosting market access for Indian exporters, especially in textiles, leather, pharmaceuticals, chemicals, and marine products. It enhances India's competitiveness against exporters such as Bangladesh and Vietnam. The FTA also removes tariffs on many pharmaceutical exports, strengthens regulatory cooperation, and lowers production costs by easing access to advanced European machinery and inputs. It is also expected to foster digital trade, boost investor confidence, and strengthen long-term economic resilience. Widely regarded as the "mother of all deals", the agreement represents a transformative boost to India's export ecosystem and marks a decisive shift in India's broader global trade strategy.

The deal with the U.S.

Early in February 2026, India and the U.S. signed a framework for an interim agreement on reciprocal trade, restating their commitment to advancing negotiations on a broader U.S.-India Bilateral Trade Agreement (BTA). The interim framework is designed to progressively reduce tariffs across a range of products, thereby facilitating greater Indian exports to the U.S. market and enhancing overall market access.

The agreement also prioritises strategic collaboration in critical sectors such as rare earths and semiconductors. This cooperation is expected to support India's ambitions in high-technology manufacturing, reinforce its electronics export capacity, and strengthen its emergence as a reliable global hub for electronics and semiconductor-related production. By diversifying export destinations and reducing overdependence on specific markets, the pact enhances India's strategic and economic flexibility. Strategically, India's recent global trade agreements collectively signal a major shift toward enhancing its role as a leading player in the global trading system. This shift is visible across four key dimensions. First, deeper engagement with advanced economies such as the EU and the U.S. provides India with preferential access to some of the world's most

lucrative and high-demand markets. Such access is expected to significantly strengthen India's export potential and global market presence with benefits flowing to labour-intensive sectors integrating the Micro, Small, and Medium Enterprises into the Global Value Chains. The agreements are across continents that reinforces India's strategic attempt to diversify and not become overly dependent on any single geography.

Second, FTAs reduce barriers on both exports and imports of intermediate goods, enabling Indian firms to integrate more effectively into global supply chains and improve their global competitiveness. This integration is especially beneficial for high-growth sectors such as technology, electronics, pharmaceuticals and services, all of which depend heavily on seamless cross-border movement of inputs and components.

Third, trade agreements serve as strategic instruments for enhancing India's diplomatic influence. By establishing deeper economic interdependence with major powers, India strengthens its role in global economic governance and positions itself as a more influential voice in shaping trade norms and standards.

At the core

India's evolving global trade strategy is central to its ambition of becoming an economic superpower and achieving Viksit Bharat. After opting out of the Regional Comprehensive Economic Partnership, India adopted a calibrated approach – boosting domestic manufacturing through production-linked incentives and infrastructure expansion while deepening global integration. Trade agreements with Australia, the EU, the UAE, and the U.K. aim to expand market access, attract investment, and diversify exports. By strengthening supply chains, promoting digital and services trade, and integrating into global value chains, India seeks to scale high-value exports and position itself as a leading force in global commerce.

- Emphasis on diversification to reduce dependence on single markets.

Key Points for Mains

- Shift from cautious FTA approach to engagement with advanced economies.
- Trade agreements used as instruments of economic diplomacy.
- Alignment of trade strategy with "Viksit Bharat" vision.
- Balancing strategic autonomy with deeper global integration.
- Trade diversification reduces geopolitical vulnerability.

Static Linkages

- Foreign Trade (Development and Regulation) Act, 1992.
- Article 246 & Union List – Trade and Commerce with foreign countries.
- WTO principles: MFN & National Treatment.
- Comparative Advantage theory (David Ricardo).
- Balance of Payments – Current Account components.
- PLI Scheme and Atmanirbhar Bharat strategy.
- MSMED Act, 2006 – MSME framework.

Critical Analysis

Positives

- Greater market access in high-income economies.
- Boost to labour-intensive sectors and MSMEs.
- Strengthens supply chains and GVC integration.
- Enhances diplomatic leverage.
- Promotes technology transfer and high-value manufacturing.

Challenges

- Risk of widening trade deficit.
- Pressure on sensitive domestic sectors (dairy, agriculture, SMEs).
- Compliance costs due to stringent EU regulatory standards.
- Need for strong domestic reforms (logistics, ease of doing business).
- Overdependence on external demand amid global slowdown.

Way Forward

- Strengthen domestic competitiveness (infrastructure, logistics, skilling).
- Enhance export credit and MSME support mechanisms.
- Strategic tariff calibration in sensitive sectors.
- Improve trade facilitation and customs digitisation.
- Deepen value addition rather than raw-material exports.
- Strengthen standards certification ecosystem to meet EU norms.

KEY HIGHLIGHTS

Context

- India updated Foreign Trade Policy (FTP) 2023 signed on January 27, 2025 after nearly two decades of negotiations. Described as "historic" by European Commission President Ursula von der Leyen, it creates a vast free trade zone covering nearly two billion people.
- The agreement reduces or eliminates tariffs on
- India updated Foreign Trade Policy (FTP) 2023 with a target of \$2 trillion exports by 2030.
- As per Department of Commerce (2025 Year-End Review), total exports reached \$825.25 billion (6.05% annual growth).
- India signed a landmark FTA with the European Union in January 2026 after nearly two decades of negotiations.
- India and the United States signed an interim reciprocal trade framework, advancing negotiations on a Bilateral Trade Agreement (BTA).
- India's FTA coverage projected to increase from 22% (2019) to nearly 71% of export basket by 2026.
- India earlier opted out of Regional Comprehensive Economic Partnership (RCEP) citing concerns over trade imbalance and domestic industry protection.

Key Points for Prelims

- EU FTA reduces/eliminates tariffs on over 90% of traded goods.
- Boost to sectors: textiles, leather, pharmaceuticals, chemicals, marine products.
- Enhances services trade (IT, fintech, digital trade).
- Promotes integration into Global Value Chains (GVCs).
- U.S.-India cooperation includes rare earths and semiconductors.
- Complements Production Linked Incentive (PLI) schemes.
- Supports MSME integration into global supply chains.

Band aid

The constitutionality of the flawed SIR process must be decided quickly

With the corrections and claims process coming to an end, the Special Intensive Revision (SIR) process has seen the release of final electoral rolls except in West Bengal and Uttar Pradesh which are due soon. The net number of voters removed (with fresh additions) from the pre-SIR electoral rolls in States such as Tamil Nadu (nearly 11.5%), Gujarat (13.4%) and Chhattisgarh (11.8%) remain high. Tamil Nadu and Gujarat are, after all, net in-migrant States unlike Bihar where deletions were around 6%. The high number of deletions, and the fact that excisions are higher for female than male electors, suggests that the SIR process, as envisaged and implemented by the Election Commission of India (ECI), suffered from clear structural defects. A clear-cut assessment could have only been possible with comparison with Census figures, but due to the prolonged delay by the Bharatiya Janata Party-led Union Government, only outdated numbers from 2011 are available. The final figures of the electorate in major States where the SIR was conducted indicate that the registered adult population in the final rolls is much below the projected estimates. This again raises the question of whether the ECI should have waited for the Census before rushing the SIR – but that is now only of academic interest.

The exercise's lacunae and anomalies could have been mitigated if the Supreme Court of India had ruled on SIR's constitutionality and compelled the ECI to adopt a more robust – though slower – household-by-household count, instead of depending on an enumeration that shifts the burden onto electors to prove their eligibility. This exercise has clearly, and unduly, affected migrant voters – especially those leaving their residence for the short term and married women who have shifted residences. By letting the process to continue despite its frailties, the Court relied on the ECI's claim that concerns with omissions are overblown, given the relatively few complaints filed by political parties. But the fact that political parties participate in a zero-sum game of competition should alert to the possibility of their relative lack of agency in assisting all electors to be part of the list. Also, unlike other identity documents such as ration card, passport or Aadhaar, the voter identity card is of use only during quinquennial elections, disincorporating citizens from trying to ensure that they are on the list. This is even more so in West Bengal, where the ECI's shoddy implementation has created such a humongous mess that the Court has sought the services of not just the State's judicial officers but those of its neighbours to aid in the "legal verification" process. The Court is seeking to ease the hurt rather than aid the process of universal adult franchise.

KEY HIGHLIGHTS

Context of the News

- The Election Commission of India (ECI) completed the Special Intensive Revision (SIR) of electoral rolls in several States.
- High deletions recorded:
 - Tamil Nadu – ~11.5%
 - Gujarat – ~13.4%
 - Chhattisgarh – ~11.8%
 - Bihar – ~6%
- Final rolls indicate registered adult population lower than projected estimates.
- Female electors reportedly faced higher deletions than male electors.
- Updated Census data unavailable (last Census: 2011).
- The Supreme Court of India permitted continuation of the process despite concerns.

Key Issues

- High Deletions in Net In-migrant States – Questions methodology and enumeration standards.
- Gendered Impact – Married women shifting residence more vulnerable.
- Migrant Exclusion – Temporary and seasonal migrants disproportionately affected.

- Burden of Proof Model – Electors required to prove eligibility instead of proactive enumeration.
- Absence of Updated Census – Weakens demographic benchmarking.
- Institutional Accountability – Judicial restraint vs constitutional oversight.

Constitutional & Legal Framework

- Article 324 – ECI's authority over elections.
- Article 326 – Universal Adult Suffrage (18+ years).
- Representation of the People Act, 1950 – Preparation and revision of electoral rolls.
- Electoral roll integrity is foundational to democratic legitimacy.

Static Concepts to Revise

- Universal Adult Franchise.
- Delimitation and Census linkage.
- Constitutional bodies – independence and accountability.
- Principles of Natural Justice.
- Migrant labour and urbanisation trends (Census 2011 data).

Critical Examination

Concerns

- Risk of exclusion of eligible voters → democratic deficit.
- Gender disparity in deletions undermines inclusive representation.
- Census delay affects electoral planning and population projections.
- Institutional credibility of ECI at stake.
- Judicial non-intervention limits procedural correction.

Counter-Arguments

- Periodic revision necessary to remove duplicates and deceased voters.
- Complaint levels reportedly low.
- ECI constitutionally empowered to conduct revisions.

Way Forward

- Synchronise intensive revision with updated Census data.
- Household-based enumeration rather than self-certification.
- Gender-sensitive revision protocols.
- Use of technology with safeguards (Aadhaar linking subject to privacy norms).
- Transparent public audit of deletions and additions.
- Strengthened grievance redressal mechanisms.

Inglorious retreat

Top court's failure to uphold directives on cow vigilantism is shocking

The Supreme Court of India has washed its hands of the responsibility to enforce its own guidelines of 2018 to prevent and punish mob violence in the name of cow protection. The trajectory of this case over the years had foretold this outcome, and fits within a disturbing pattern of judicial diffidence in the face of majoritarian politics. On February 23, the Chief Justice of India (CJI), Justice Surya Kant, observed that the "general directions" issued by the Court in a 2018 judgment to the Centre and States to prevent and prosecute cow vigilantism and mobocracy were "unmanageable". The CJI favoured an approach of taking up each crime on its singular facts and merits, and went on to add that if someone's rights are infringed, they could seek legal recourse. Petitioners had sought contempt proceedings against States that have refused to implement preventive, punitive and remedial measures against cow vigilantism. In 2018, a Bench headed by then CJI Dipak Mishra had expressed shock and dismay over the spate of violence perpetrated by cow protection gangs. The Court had observed that lynching "must be curbed and crippled", stressing that the state has a "sacrosanct duty" to protect citizens. The 2018 guidelines assumed the Court would remain a watchdog, but what followed was a gradual, but unmistakable, judicial retreat that now appears final with the pronouncement of the CJI.

In a situation of perfect rule of law, there is no reason for the highest court of the land to be directly involved in monitoring policing. Any police force acting in fidelity to the law would curb and bring to justice acts of violence. That citizens had to seek the intervention of the Supreme Court for what should be a routine police function was itself revealing, and the 2018 judgment reflected that awareness. Since 2018, cow vigilantism has grown more monstrous, while the police and State governments, in many places, overlook or even encourage mob violence in the name of cow protection. In several States, cow vigilantes have been accorded legal sanctity and quasi-policing powers in blatant violation of the Court's guidelines. The Court earlier refused to entertain a special challenge to such empowerment of mobs, asking petitioners instead to file individual petitions in High Courts. Several Bharatiya Janata Party-ruled States have not only refused to implement the Court's directives but have also moved in the opposite direction by enabling vigilantism. Vigilante violence continues unabated, with the police looking away – or worse, turning against the victim. It will be a severe blow to the rule of law if the Court sticks to the view that it has no reason or intent to uphold its own directives.

KEY HIGHLIGHTS

Context of the News

- In February 2026, the Supreme Court observed that its 2018 guidelines against mob lynching and cow vigilantism were "unmanageable".
- Petitioners had sought contempt action against States for non-implementation of the 2018 directions.
- The Court indicated preference for case-specific adjudication rather than continuous monitoring.
- The 2018 judgment had termed lynching as an attack on rule of law and constitutional values and directed preventive, remedial, and punitive measures.

Key Points

Preventive Measures

- Appointment of a Nodal Officer (SP rank) in each district.
- Identification of vulnerable districts.
- Preventive policing and intelligence gathering.

Remedial Measures

- Compensation scheme for victims.
- Fast-track trials.
- Witness protection.

Punitive Measures

- FIR registration under IPC provisions.
- Departmental action against negligent officials.
- Suggested enactment of a separate anti-lynching law by Parliament.

Constitutional & Legal Dimensions

- Article 14 – Equality before law.
- Article 21 – Right to life and personal liberty.
- Article 256 – Obligation of States to comply with Union laws and constitutional directions.
- Articles 129 & 142 – SC's contempt powers and power to do complete justice.
- Criminal law & police – Concurrent List (List III).

Static Linkages

- Rule of Law – Supremacy of law and equality before law.
- Separation of Powers – Judicial monitoring vs executive domain.
- 2nd ARC Report on Public Order – Police accountability & reforms.
- Prakash Singh (2006) case – Police reforms and autonomy.
- Fundamental Duty under Article 51A(e) – Promote harmony.

Critical Analysis

Concerns

- Weak enforcement may dilute judicial authority.
- Signals retreat from proactive protection of fundamental rights.
- Encourages federal non-compliance with court directives.
- Undermines deterrence against mob violence.

Counter-Arguments

- Policing is primarily an executive function.
- Continuous judicial monitoring may breach separation of powers.
- Case-specific approach ensures procedural fairness.

Way Forward

- Enact a comprehensive anti-lynching legislation.
- Strengthen police reforms (Prakash Singh compliance).
- Mandatory district-level accountability audits.
- Clear SOPs for mob violence prevention.
- Use of technology & social media monitoring to curb incitement.

With Israel and broader Middle East, a diplomacy less defensive, more realist



RAJA MANDALA
BY C RAJA MOHAN

PRIME MINISTER Narendra Modi's visit to Israel on February 25-26 marks a significant milestone in the evolution of bilateral relations and coincides with a transformation in the geopolitics of the Middle East. On both the bilateral and regional fronts, the PM's talks with Israeli Prime Minister Benjamin Netanyahu could turn out to be consequential. India's engagement with Israel was taboo in the early decades of post-independence diplomacy. It became a cautious adjunct after the early 1990s, when Delhi established full diplomatic relations. It was only after the Modi government took charge in 2014 that the relationship acquired a strategic dimension. To be sure, Modi's trip — only the second ever by an Indian prime minister to Israel — will provoke concern in parts of Delhi's political class. Some will argue that India is abandoning the founding principles of its foreign policy. A closer look at the history of India-Israel relations, however, reveals a far more complex trajectory. There is no question that stronger ties with Israel are part of the BJP's ideology, dating back to the Jana Sangh days. In 1977, as foreign minister in the Janata Party government, Atal Bihari Vajpayee opened a political channel to Israel, quietly hosting its foreign minister, Moshe Dayan, in a secret visit to Delhi. It did not remain a secret for long and triggered controversy, as

prime minister, Vajpayee hosted Ariel Sharon for the first-ever visit by an Israeli PM to India in 2003. Modi followed with his path-breaking visit in 2015. But it would be incorrect to say Congress was always hostile to Israel. Jawaharlal Nehru recognised Israel early on, but held back on establishing full relations. He allowed Israel to open a consulate in Mumbai in the 1950s. Ideological antipathy to Israel sharpened only in the Indira Gandhi years, when Indian diplomacy embraced radical rhetoric in the Middle East. Yet, even she did not ask Israel to shut its consulate. Rajiv Gandhi revived engagement, and Narasimha Rao normalised ties in 1992. Yet, the Congress governments thereafter kept the relationship discreet. The communist parties that rail against engagement today conveniently forget that their tallest leader, Jyoti Basu, travelled to Israel in 2000 to establish cooperation between West Bengal and the Jewish state. Part of the Indian ambivalence toward Israel is due to the huge emotional salience of the Palestinian cause. An Israeli diplomat in Delhi used to quip that the Congress governments treated Israel like a "mistress" — private engagement and public distance. Modi's 2017 visit broke that mould. The 2026 trip signals a major expansion of strategic collaboration — especially in security, defence, and advanced technologies. Modi's visit comes as Israel faces global criticism for its regional policies. But that is not weighing heavily in Delhi's calculus. Israel today enjoys greater room for manoeuvre in the region than ever before. Several Arab and Muslim states have normalised ties with Israel. Even those that haven't — Saudi Arabia, Pakistan, and Indonesia — sit with Israel on Donald Trump's Board of Peace,

which is now empowered to administer Gaza. The gulf between rhetorical solidarity with Palestine and actual statecraft has never been wider in the Middle East and the Muslim world. Meanwhile, the balance of power on the ground has shifted dramatically since October 7, 2023. The US and Israel's attacks against Iranian nuclear infrastructure and the systematic degradation of Hamas and Hezbollah — Tehran's allies — have reshaped the regional balance. Iran — the most consequential revisionist power in the Middle East for four decades — has been severely weakened. Its Axis of Resistance against Israel has been hollowed out. Israel, by contrast, emerges militarily dominant in the region. Tel Aviv's influence on Washington's Middle East policy reinforces it politically. Amid this churn, Netanyahu has floated a new "hexagonal" alliance. Presented as a regional coalition against regional radicalism, it seeks to cover a vast swath stretching from the Mediterranean to the Horn of Africa and Asia. The proposal reflects Netanyahu's view that India must play a key role in stabilising the Middle East. For India, the idea is attractive not as a formal alliance — which Delhi instinctively avoids — but as an emerging framework for raising its regional profile. Meanwhile, Iran's weakening in relation to Israel has also triggered a counter-movement among some regional states — including Saudi Arabia, Turkey, and Qatar — exploring a coalition to constrain Israel. Pakistan has been drawn in. Riyadh and Islamabad signed a Strategic Mutual Defence Agreement last year, treating an attack on one as an attack on both. Turkey has signalled interest in joining. Talk of an "Islamic NATO" worries many, including India. But alliances of this kind have rarely en-

dured in the Middle East; what has persisted is the historic Anglo-American domination. The US remains the chief arbiter of war and peace in the Middle East. India's ties with Israel now sit atop a broader transformation. Relations with the UAE are flourishing — from energy and investments to defence manufacturing, fintech, AI, and critical minerals. Economic and military ties with Saudi Arabia have grown. India launched free trade talks with the Gulf countries this month. India's ties with Israel no longer shape the Middle Eastern engagement with Delhi. This has enabled India to pursue parallel tracks with confidence: Supporting Palestinian statehood while engaging Israel as a vital partner. Delhi has navigated the competing pulls of Shia and Sunni, Arab and Persian, Ottoman and Arab, as well as inter-ethnic quarrels within the Arab world. Except with Turkey, India now maintains productive ties with nearly all major actors in the region. None of this means India's Middle East policy has become a walk in the park. The region remains volatile, and conflict remains endemic. Military tensions between the US and Iran, Israel's domestic political turbulence, and humanitarian crises in Gaza and elsewhere in the region will test India's ability to balance principle and pragmatism. But unlike in the past, Delhi is no longer defensive. Today, it engages the Middle East with greater realism. India's growing interests — ranging from energy to export labour and connectivity to counter-terrorism — are too important for Delhi to engage the region with old ideological slogans. The writer is contributing editor on international affairs for The Indian Express. He is associated with the Mewar-Jodhpur Institute of American Studies, Jindal Global University, and the Council on Strategic and Defence Studies, Delhi

Regional Geopolitical Context

- Abraham Accords led to normalization between Israel and UAE, Bahrain, Morocco.
- Iran's regional influence has relatively weakened after recent conflicts.
- US remains the primary external power in West Asia.
- Emerging regional blocs and security alignments.
- India deepening parallel ties with Israel and Arab states.

Importance of West Asia for India

- Major source of crude oil and LNG imports.
- Home to over 8 million Indian diaspora.
- Significant remittance inflows.
- Strategic maritime routes (Hormuz, Bab-el-Mandeb).
- Connectivity initiatives like IMEC (India-Middle East-Europe Corridor).

KEY HIGHLIGHTS

Context of the News

- Prime Minister Narendra Modi's 2026 visit to Israel marks a major expansion of India-Israel strategic cooperation.
- The visit comes amid major geopolitical shifts in West Asia after the October 7, 2023 conflict and subsequent regional military developments.
- Israel's growing regional acceptance (post-Abraham Accords) has altered power equations in the Middle East.
- India is simultaneously strengthening ties with Israel, UAE, Saudi Arabia and other Gulf countries.
- The visit reflects India's shift from cautious engagement to confident strategic partnership.

Key Points

Evolution of India-Israel Relations

- 1950: India recognized Israel but did not establish full diplomatic ties.
- 1992: Full diplomatic relations established under PM Narasimha Rao.
- 2017: First standalone visit by an Indian PM (Modi) to Israel.
- 2026: Strategic expansion in defence, technology and regional coordination.

Areas of Cooperation

- Defence (missile systems, UAVs, radar technology)
- Counter-terrorism cooperation
- Agriculture (Centres of Excellence)
- Water management and desalination
- Cybersecurity, AI and innovation
- Space and high-tech collaboration

Static Linkages

- Non-Alignment Movement (NAM) evolution.
- Strategic autonomy in foreign policy.
- Balance of Power theory.
- Two-State Solution (Israel-Palestine).
- Energy security and import dependence.
- Diaspora diplomacy.
- Multi-alignment doctrine.

Critical Analysis

Positives

- Strengthens India's defence preparedness.
- Expands access to advanced technology.
- Enhances counter-terror cooperation.
- Boosts India's regional strategic profile.
- Reflects pragmatic multi-alignment.

Challenges

- Balancing ties with Iran and Israel.
- Domestic political sensitivity over Palestine issue.
- Volatility in West Asia.
- Risk of over-securitisation of engagement.
- Humanitarian concerns in Gaza affecting India's global image.

Strategic Dilemma

- Supporting Palestinian statehood while expanding ties with Israel.
- Maintaining neutrality amid regional rivalries.

Way Forward

- Continue policy of strategic autonomy.
- Maintain support for peaceful two-state solution.
- Diversify energy sources to reduce vulnerability.
- Deepen economic engagement with Gulf Cooperation Council.
- Expand cooperation in climate tech, food security and digital innovation.
- Strengthen crisis evacuation and diaspora protection mechanisms.

Four years on, Russia-Ukraine war has no victors



RAJAN KUMAR

FEBRUARY 24 marked the fourth anniversary of the Russia-Ukraine war, but peace remains as elusive as ever. It has turned into a war of attrition with little substantial gains for anyone. The war has exceeded the duration of Russia's involvement in the Great Patriotic War (World War II), which lasted 1,417 days. Ukraine has fought valiantly but the Trump administration is pushing it to sign a humiliating deal with Russia. The ongoing negotiations in Geneva largely favour Russian terms and conditions: Captured territory will remain with Russia, Ukraine will not be offered NATO membership, and sanctions on Russia will be lifted gradually.

Russia started the war with three primary objectives: Prohibiting Ukraine from joining NATO, protecting its Russian-speaking population in the Donbas region, and installing a favourable regime in Kyiv. Moscow expected a short war that would force President Volodymyr Zelenskyy to surrender. But it was a mighty miscalculation. With European backing, Ukraine continues to resist Russian advances even after four years. Moscow might have succeeded in halting Kyiv from joining NATO, but the fact that two neutral states, Sweden and Finland, joined the military alliance means that Russia's insecurity persists unabated.

For political purposes, Russia can claim victory by showcasing the roughly 20 per cent of Ukrainian territory under its control. But what matters for Russia is long-term border security and strategic balance. With new territorial acquisitions, Russia will not acquire the deterrence and security it seeks. Further, Russia's economy has been sanctioned and isolated from the West. The normalisation of ties will take years. Europe has fared no better. Blinded by its idealism, Europe presented it as a war between democracy and dictatorship, expecting widespread international support. But, barring a few states, the important countries of the Global South declined to take sides and treated it as a European war. They refused to condemn the Russian invasion and continued their economic ties with Moscow. Because of this support, Russia has been able to withstand Western sanctions.

The war has had a ripple effect on geopolitics. Israel may not have decimated Hamas and Hezbollah, and attacked Iran if Russia were not involved in a gruelling war. The Kremlin could not save Bashar al-Assad and it appeared helpless to save Iran from an attack by the US. It could not protect Armenia from an Azerbaijani attack. Capturing Nicolás Maduro might not have been possible for the US had Russia provided the necessary weapons to Venezuela. The Global South did not proactively engage in efforts to mitigate the conflict. China, India, and Brazil appeared more concerned about maintaining their balanced ties than brokering an honest ceasefire. However, they must realise that a hands-off approach will not serve their interests.

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What matters for Russia is long-term border security and strategic balance. With new territorial acquisitions, Russia will not acquire the elusive deterrence and security it seeks

- Ukraine's resistance supported by US and Europe.
- Expansion of NATO despite Russia's concerns indicates security dilemma.
- Global South (India, Brazil, South Africa) maintained strategic neutrality.
- Energy geopolitics reshaped — Europe diversifying energy sources; India importing discounted Russian oil.

Static Linkages

- Principles of sovereignty and territorial integrity.
- Balance of Power theory in International Relations.
- Concept of Strategic Autonomy (India's foreign policy).
- Economic sanctions as non-military coercive diplomacy.
- Energy security and supply chain resilience.

Critical Analysis

Positives

- Reinforced NATO unity.
- Strengthened Ukrainian national identity.
- Boost to European defence spending.

Concerns

- Prolonged humanitarian crisis.
- Economic instability and food/energy inflation globally.
- Increased militarisation and bloc politics.
- Limited effectiveness of sanctions in altering Russia's strategic posture.

Way Forward

- Structured multilateral peace framework.
- Security guarantees short of NATO membership.
- Gradual, compliance-based sanctions easing.
- Strengthening multipolar dialogue platforms (G20, BRICS).
- India to continue balanced diplomacy: respect sovereignty + national interest.

KEY HIGHLIGHTS

Context of the News

- February 24, 2026 marked four years of the Russia-Ukraine conflict (began in 2022).
- The war has evolved into a prolonged war of attrition with limited territorial shifts.
- Russia controls nearly 20% of Ukrainian territory.
- Peace negotiations reportedly favour Russian conditions (territorial retention, no NATO membership for Ukraine, phased sanctions relief).
- Sweden and Finland joined NATO, altering European security dynamics.

Key Points for Prelims

- NATO founded in 1949; based on collective defence (Article 5).
- Finland shares ~1,300 km land border with Russia.
- UN Charter Article 2(4): Prohibits use of force against territorial integrity.
- Russia is a permanent member of UNSC.
- Sanctions imposed by US, EU and allies target banking, energy, and technology sectors.

Key Points for Mains

- Russia's objectives: Prevent NATO expansion, secure Donbas, strategic buffer zone.

Inside the tent, with Pax Silica

AS EMERGING technologies assume a central role in powering the global economy, securing critical mineral supplies and strengthening advanced manufacturing capabilities are urgent national priorities. Pax Silica, a US-led initiative, seeks to loosen China's stranglehold over critical minerals, particularly rare earth elements, which are essential to a wide range of industries. Although India was initially excluded when the first group of countries signed up last year in mid-December, New Delhi signed the Pax Silica declaration on the sidelines of the AI Impact Summit on February 20. In doing so, India formally entered an alliance of nations seeking to reduce what the Pax Silica factsheet refers to as "coercive dependencies" in supply chains.

Coming on the heels of a framework for a trade agreement with the US, this marks a big step forward for Delhi-Washington ties. It is accompanied by investment commitments by the US in India's AI infrastructure. According to the International Energy Agency, China accounts for an average market share of around 70 per cent in the refining of 19 of the 20 most strategic critical minerals, and 94 per cent of the production of rare-earth-containing permanent magnets. Beijing's grip allows it not only to influence global prices and create bottlenecks for competitors, but also to deploy them as leverage in negotiations. Pax Silica's aim, therefore, is to reduce the vulnerabilities of its member states. The coalition could also give a boost to domestic programmes such as IndiaAI and the National Critical Mineral Mission.

Alongside, India and the US signed the AI Opportunity Partnership, which will facilitate capital flows and deepen R&D collaboration, marking a renewal of cooperation with technology at its centre. The US-India relationship rests on strong foundations. It was only logical that, once the turbulence of the Trump tariffs receded, the underlying imperatives of security, technology, energy and the shared objective of addressing China's challenge would reassert themselves. Both sides recognise the perils of not working together. As the AI Partnership's joint statement says: "The two sides share the belief that a significant risk facing the free world is not the advancement of AI, but the failure to lead it." New Delhi should, however, be cautious about protecting its still-maturing semiconductor and AI ecosystems, and ensure that the US role does not shape domestic rules in ways that stifle capacity and participation within the country.

KEY HIGHLIGHTS

Context

- India signed the Pax Silica Declaration on the sidelines of the AI Impact Summit (February 2026).
- Pax Silica is a U.S.-led initiative to reduce "coercive dependencies" in supply chains of critical minerals, especially rare earth elements (REEs).
- India was initially excluded (Dec 2025) but has now formally joined.
- India and the U.S. also signed the AI Opportunity Partnership to deepen AI infrastructure investment and R&D collaboration.
- Move comes amid concerns over China's dominance in global critical mineral refining and rare-earth magnet production.

Key Facts for Prelims

- As per International Energy Agency (IEA):
 - China holds ~70% refining share in 19 of the 20 most strategic critical minerals.
 - ~94% of global rare-earth permanent magnet production is concentrated in China.

- Critical minerals are essential for:
 - Semiconductors
 - EV batteries and motors
 - Wind turbines
 - Defence technologies
 - AI hardware infrastructure
- India's related initiatives:
 - National Critical Mineral Mission
 - IndiaAI Mission
 - India Semiconductor Mission
- Objective of Pax Silica:
 - Diversification of supply chains
 - Reducing strategic vulnerabilities
 - Enhancing technological cooperation

Static Connections

- Strategic autonomy in foreign policy.
- Economic statecraft and weaponisation of supply chains.
- Industrial policy for advanced manufacturing.
- Energy security and green transition.
- WTO principles vs strategic trade alliances.
- Environmental concerns in mining and mineral processing.

5. Critical Analysis

Positives

- Reduces overdependence on China.
- Strengthens India-US strategic convergence.
- Boost to semiconductor and AI ecosystems.
- Supports green energy and EV transition.

Concerns

- Risk of U.S. influence over India's AI regulations.
- Environmental and social costs of mineral extraction.
- India's limited domestic refining capacity.
- Need to balance relations with China.

Way Forward

- Expand domestic mineral exploration and processing.
- Secure overseas mining assets through strategic partnerships.
- Develop rare-earth recycling ecosystem.
- Frame balanced AI governance protecting innovation and sovereignty.
- Maintain multi-alignment strategy.

India's dependence on imported oil may hit fresh full-year high in FY26

Sukalp Sharma
New Delhi, February 24

INDIA'S DEPENDENCE on imported crude oil grew to 88.6% in the first 10 months of the ongoing financial year (2025-26), indicating that the import reliance level for the full financial year could be headed for yet another record high.

It was 88.2% in the corresponding period of FY25, according to the latest data released by the Petroleum Planning & Analysis Cell (PPAC) of the Ministry of Petroleum and Natural Gas (MoPNG).

For the full FY25, reliance on imported oil was 88.3%.

According to industry insiders, the import dependency for the full FY26 could be a tad higher than the April-January level, similar to what happened in the last financial year.

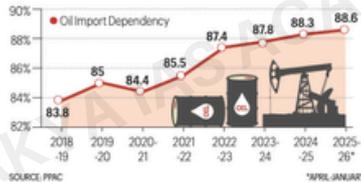
India is seen as a major growth centre for oil demand given the future potential in energy-intensive industries, growing vehicle sales, a rapidly expanding aviation sector, expected growth in consumption of petrochemicals, and a still growing population with relatively low per-capita energy consumption.

In fact, India is among the few markets where refinery capacity is expected to expand substantially over the coming years. The country currently has a refining capacity of 258 million tonnes per annum.

India's reliance on imported oil has increased over the years, with the exception of FY21 when demand was suppressed due to the pandemic. Given the country's stagnant domestic oil production, rising demand for petroleum fuels and products is expected to lead to higher oil imports in the foreseeable future.

India's heavy reliance on imported crude oil makes its economy vulnerable to global oil price fluctuations. This also im-

India's rising reliance on crude oil import



ports the country's trade deficit, foreign exchange reserves, the rupee's exchange rate, and inflation rate, among others.

The government aims to reduce the country's reliance on imported crude oil but faces challenges due to sluggish domestic oil output amidst rising demand. In 2015, the Centre targeted to reduce reliance on oil imports to 67% by 2022.

The government has implemented several policy reforms to encourage investments in India's oil and gas exploration and production sector. It is also promoting electric mobility, biofuels, and other alternative fuels to reduce oil imports.

While there has been an increase in electric mobility adoption and the blending of biofuels with conventional fuels, it has so far not been sufficient to offset petroleum demand growth.

In numbers: India's growing reliance

India's crude oil imports rose to 206.3 million tonnes (mt) in the 10 months to January from 201 mt in the year-ago period, as per provisional data from the PPAC. Domestic oil production for the period declined slightly to 23.5 mt from 24 mt, while domestic consumption of petroleum products rose 1.6% to 202.2 mt. Of this, 23 mt of products are

estimated to have been produced from crude oil produced in India, thereby resulting in a self-sufficiency level of 11.4%.

The calculation of the extent of import reliance is based on the domestic consumption of petroleum products and excludes petroleum product exports as those volumes do not represent India's demand. Consumption of petroleum products is projected to increase by 2.8% in FY27, reaching 250.8 mt, according to PPAC projections.

If these projections hold, the country's petroleum fuel and product consumption in FY27 will hit yet another record. And the trend of growing petroleum consumption is expected to continue for the foreseeable future. In November, Paris-based International Energy Agency (IEA) had said that India will be the biggest driver of global oil demand over the next 10 years, surpassing China.

"India leads global oil demand growth over the next ten years, with almost half of the additional barrels produced globally to 2035 heading in its direction. Its oil use increases from 5.5 mb/d (million barrels per day) in 2024 to 8 mb/d in 2035 as a result of rapid growth in car ownership, increasing demand for plastics, chemicals and aviation, and a rise in the use of LPG for cooking," the IEA said in its World Energy Outlook 2025.

KEY HIGHLIGHTS

Context

- India's crude oil import dependence increased to 88.6% (April-January FY26), up from 88.2% in the same period of FY25 (PPAC, Ministry of Petroleum & Natural Gas).
- Full-year FY25 import dependence: 88.3%.
- Domestic crude production: 23.5 mt (decline from 24 mt).
- Crude imports: 206.3 mt (increase YoY).
- Petroleum product consumption: 202.2 mt; self-sufficiency ~11.4%.
- IEA (World Energy Outlook 2025): India to be the largest contributor to global oil demand growth till 2035.

Key Data & Facts

- Refining capacity: 258 MTPA (India among top global refiners).
- Target (2015): Reduce import dependence to 67% by 2022 (not achieved).
- Petroleum demand projected to reach 250.8 mt by FY27 (PPAC).
- Oil import dependence calculated based on domestic consumption, excluding exports.
- India imports ~85-90% of crude oil needs but exports refined petroleum products.

Static Linkages

- Crude oil is part of the Eight Core Industries (Index of Industrial Production).
- Oil imports impact Current Account Deficit (CAD) under Balance of Payments.
- High crude prices cause cost-push inflation (fuel → transport → food prices).
- Strategic Petroleum Reserves (SPRs) managed by ISPRIL for energy security.
- Policies promoting diversification:
 - Hydrocarbon Exploration and Licensing Policy (HELP)
 - Open Acreage Licensing Policy (OALP)
 - Ethanol Blending Programme (20% target by 2025-26)
 - FAME Scheme for EVs
- Linked to India's Energy Security and NDC climate commitments.

Issues & Implications

- Vulnerability to:
 - Global oil price shocks
 - Geopolitical instability (West Asia, Russia-Ukraine)
- Worsens:
 - Trade deficit
 - Exchange rate stability
 - Inflationary pressures
- Domestic production stagnant despite policy reforms.
- Rising demand due to:
 - Urbanization
 - Transport growth
 - Aviation expansion
 - Petrochemicals demand

Way Forward

- Accelerate domestic E&P reforms and private investment.
- Expand renewable energy capacity (500 GW non-fossil target by 2030).
- Faster EV adoption and public transport electrification.
- Strengthen Strategic Petroleum Reserves.
- Diversify crude import sources.
- Promote green hydrogen and biofuels.