

EDITORIAL HIGHLIGHTS

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Moves by the North of England to unlock India trade

The India-United Kingdom Comprehensive Economic and Trade Agreement (CETA) has opened the door to a new phase in the relationship between the two countries, with the focus now shifting from agreement to action. The momentum is already being seen, as the leaders from across the North of England have been travelling together to India, for the first time under The Great North banner to strengthen ties on trade, investment, innovation, culture and the visitor economy.

Beyond headlines

Agreements are only as powerful as the opportunities they unlock. Tariff reductions, regulatory alignment, and mobility provisions matter enormously; yet, their true value is realised only when businesses on the ground understand precisely where and how they apply. Keeping this in mind, the Northern Mayors were joined by businesses, small and medium enterprises and universities from across the region to help bolster links, showcase the North's economic assets and create new opportunities for trade, investment and academic collaboration. The North of England and India already have deep and growing ties, with nearly 5,40,000 people of Indian origin living across the region. Indian companies have invested over £1bn in the Northwest alone, supporting more than 6,700 jobs, according to the Confederation of Indian Industry report. Nearly 200 delegates from across the North were part of the visit, bringing together mayors, businesses, universities and leaders from tourism, culture and sport to make the case for the North as a destination for investment, partnerships and growth.

U.K. Foreign Secretary David Lammy's statement (made in 2024) describing the trade pact as "the floor, not the ceiling" of the bilateral relationship is the true essence of the current ties between New Delhi and London. The agreement



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Regional partnerships can help businesses unlock the potential of the India-U.K. trade pact

is the result of several rounds of negotiations, over the years – 14 rounds of discussions, with each point deliberated to deliver and cash-in on strengths and individual goals of the two nations.

The U.K. India Business Council, a mission partner for the Great North delegation, is working to help U.K. businesses better understand the opportunity and reframe how they see India. India is no longer simply a market to sell into. It is a strategic partner with the potential to become an integral part of the U.K.'s research and development (R and D), technology, talent and supply chains.

Visits to action

In the last few years, the ministerial and government visits have been largely with a broader vision to keep the ball rolling. This was seen with former U.K. Prime Minister Sir Keir Starmer's delegation coming to India in 2025 and vice-versa. But this time we see policymakers coming in to discuss the next steps. Government meetings, business delegations, university partnerships, R and D collaborations, sports and cultural ties and targeted regional engagements in business hubs of India. The itinerary was designed to build a long-term relationship.

There is already some impact, with the footprint of Indian businesses in the U.K. having expanded sharply this year, the number of Indian-owned companies rising nearly 60% from the previous year and combined revenues surpassing £105 billion, according to the latest India Meets Britain Tracker published by Grant Thornton UK.

Bilateral trade between India and the U.K. rose to £47.4 billion in 2025, marking an 11.7% increase from the previous year. Growth was concentrated on advanced manufacturing, clean energy and technology. With the CETA now in place, the India-U.K. corridor is poised for unprecedented growth, creating value for both economies.

In one of the UK India Business Council (UKIBC)'s reports on the CETA, it has focused on regional collaboration, mapping them against the sector-specific pathways for growth. A regional approach to trade engagement offers India a nuanced and targeted pathway into the U.K. economy; one that goes beyond London and into the innovation-rich heartlands of Britain. The report takes one step ahead from the macro view and delves into specifics. Examine Maharashtra's aerospace ambitions, Gujarat's chemical exports, Karnataka's world-class IT ecosystem and Tamil Nadu's pharmaceutical prowess. It asks not just what this deal means for India or the U.K. in aggregate, but also what it means for the industries and communities that will live with its consequences day to day.

Conversations need to translate into business. For a micro, small and medium enterprise, the challenge is often not whether the benefits of a trade agreement exist, but how one can access them. That means understanding and navigating the finer details, such as knowing that a tariff preference exists, establishing whether a product qualifies, meeting rules of origin, securing the right documentation, and managing the administrative costs of claiming the benefit. It can be seen as an empowering process.

Business guide

As India signs more trade agreements, the task is about ensuring businesses can take full advantage of what has been negotiated on their behalf. To simplify this, the UKIBC has developed a U.K.-India CETA Business Utilisation Manual – A Practical Activation Guide for Indian and UK Businesses, which was launched recently by Union Commerce and Industry Minister Piyush Goyal in London. The guide is designed to simplify the agreement and help businesses understand where the opportunities lie, whether they qualify, and how to act on them.

GS 2: POLITY

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The ECI's unfinished lessons

India's electoral system has evolved through successive efforts to make elections more inclusive, enforceable and accessible. Today, the mass revision of electoral rolls, suspicious voter deletions, and questions about access to polling records test the Election Commission of India's (ECI) ability to ensure that every eligible voter can participate equally. Its history offers lessons for the challenges ahead.

When India prepared its first electoral roll, nearly 28 lakh women were left off because they were identified through their relationships to men rather than being registered under their own names. Sukumar Sen, India's first Chief Election Commissioner, worked to ensure that women were enrolled in their own right, and by the 1957 elections, about 85% of those affected had been registered under their own names.

This lesson matters now as the ECI undertakes its Special Intensive Revision (SIR) of electoral rolls. In Bihar, around 65 lakh names were missing from the draft roll published in August 2025. The Commission cited reasons such as deaths, migration and duplicate entries. While updating electoral rolls is necessary, voters must be able to check why their names have been left out and challenge errors. The Supreme Court directed the ECI to publish the list of excluded voters along with the reasons for exclusion.

In a similar line, West Bengal shows what happens when correcting errors becomes slow. More than 27 lakh names were deleted during adjudication,



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prompting around 22 lakh appeals. Moreover, tribunal judges have raised technical concerns such as problems with the appeals portal, including difficulties issuing notices, conducting hearings and restoring names. While both cases show that removing names may be necessary to keep rolls accurate, correcting wrongful exclusions is equally important. A remedy that comes too late results in a lost vote.

The Form 7 question

The same principle applies to Form 7, through which an elector can seek the deletion of a name from the roll. In Aland, Karnataka, 6,018 online applications sought deletions. Of these, the ECI said that they rejected 5,994 applications as they were incorrect, and accepted only 24 after verification. An inquiry followed, and an FIR was registered. Rejecting incorrect applications show that safeguards can work. But a concentrated pattern of applications requires the ECI to establish who submitted them and whether identities or documents were misused. Every deletion request should leave a verifiable record of the applicant, supporting evidence, and the final decision.

Transparency in polling data presents another test. In Maharashtra's 2024 Assembly election, reported turnout rose from 58.22% at 5 p.m. to 66.05% in the final figure. The Commission explained that the earlier number was provisional and that data continued to be updated as polling parties returned and records were scrutinised. While a difference between provisional and final figures

does not by itself establish improper voting, a substantial change makes a clear explanation necessary.

In December 2024, following a Punjab and Haryana High Court order to release election-related records in a case concerning the Haryana Assembly election, the government amended Rule 93 of the Conduct of Elections Rules. The change raised concerns about public access to electronic records, including CCTV footage and webcasting material. The timing of the change raised questions about whether the aim was to protect privacy or limit scrutiny.

Institutional independence matters just as much. In *Anoop Baramwal vs. Union of India* (2023), the Supreme Court prescribed an interim selection committee comprising the Prime Minister, the Leader of the Opposition and the Chief Justice of India to select election commissioners. Parliament later replaced the Chief Justice with a Union Cabinet Minister. The government now controls two of the three keys to the room where election commissioners are chosen. This hardly inspires public confidence in the ECI's independence.

While the ECI need not accept every allegation made by political parties, constitutional authority cannot substitute for verifiable evidence. Accurate rolls, traceable deletion requests, timely appeals and independently examinable polling records are safeguards owed to every voter. In an electoral democracy, trust must be earned through evidence, clarity and the willingness to correct mistakes.

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GS 3: ECONOMY (AGRICULTURE)

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On paddy field conservation in Keralam

A conservation law meant to protect Keralam's paddy fields is gradually becoming an instrument facilitating its decline. The State had 8.82 lakh hectares (ha) of paddy fields during 1974-75, which reduced to 1.76 lakh ha in 2024-25, a drop of 80%, owing to crop shifts, housing and commercial growth, developmental needs, and a speculative land market. Despite the enactment of the Kerala Conservation of Paddy Land and Wetland Act (KCPWA) in 2008, the decline continues.

Rather than ineffective enforcement, what is unfolding is an implausible dilution of conservation logic through ongoing bureaucratic redesign, effected by multiple circulars and orders. The shift is astounding, as the State rightfully recognised the ecological value of paddy fields within KCPWA.

A case of legal dilution

The structural and procedural modifications to KCPWA demonstrate how even a strong conservation law can be diluted. The Kerala Finance (No.2) Act, 2015, amended the KCPWA by adding Section 3A, which regularised unauthorised paddy field conversions prior to 2008 upon the payment of a nominal fee. This contravened the Local Self-Government Department (LSGD) circulars of 2008 and 2011, which set 1998 as the cut-off year for implementing the conservation norms, thereby legitimising the reclamations between 1998 and 2008. In 2016, a State notification removed Section 3A without reference to the regularisation cases during



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Neglecting paddy fields as a socio-ecological system that regulates local biodiversity, the hydrological cycle, and microclimate constitutes a grave failure, amid rising food insecurity and floods

the amendment period.

Although the KCPWA mandates the development of a verifiable databank of paddy fields, the process remains incomplete. Consequently, no reliable data source exists to verify the land status in many districts. This blatant administrative failure has become a legal loophole, as KCPWA (Amendment) 2018 and successive revenue circulars are facilitating the conversion of a larger extent of unnotified land (paddy fields in revenue records but not included in databank) for residential, commercial, or other purposes.

Building permits on unnotified lands are facilitated by expanding eligibility criteria and expediting category change applications. In 2017, the LSGD withdrew its 2008 and 2011 circulars, which declared 1998 as the cut-off year for regularisation, and its 2012 and 2013 circulars, which restricted land transactions after obtaining housing permits. Despite a High Court order in 2015 for strict legal compliance in building permit issuance, from 2016 onwards, multiple LSGD and revenue circulars facilitated the rapid disposal of applications, with little emphasis on water conservation mandates.

The Comptroller and Auditor General of India's revenue sector report of 2016 identified the non-detection of illegal paddy field conversions, the non-reporting of unauthorised reclamations, legal non-compliance, and non-reinstatement of illegally converted land as major lapses. The scrutiny turns challenging as the State is fast-tracking conversion applications by deploying additional officials

and infrastructure and processing land parcels in clusters.

Until 2002, the Department of Agriculture, with direct agro-ecological stakes in wetland conservation, largely monitored non-agricultural land use. Post-KCPWA, the Department of Revenue became the primary monitoring authority. The Department's dual role as both a conservation regulator and a revenue generator from regularisation confers immense power over land-use decision-making.

Until 2024, the Department earned up to ₹1,606 crore through paddy field regularisation. A strict enforcement of the conservation law remains constrained since the regulator earns consistent revenue from paddy field conversion, causing a structural dilemma.

Over the years, bureaucratic enforcement appears to be facilitating regularisation of paddy fields – recategorisation to non-wetland status, dilution of water-conservation mandates, and widening of conversion eligibility – with limited conservation focus. Neglecting paddy fields as a socio-ecological system that regulates local biodiversity, the hydrological cycle, and microclimate constitutes a grave failure, amid rising food insecurity and floods.

Given that the KCPWA is a progressive statute, political and administrative goodwill is needed to achieve its conservation goals. Completion of a verifiable wetland-paddy databank, strict monitoring, and ecologically informed conversion penalties are a few of the immediate steps that can be taken.

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How conversion affects reservation

The invalidation of Tamil Nadu's order enabling persons converting to Islam from Backward Classes and Scheduled Castes to obtain Backward Class Muslim certificates highlights that while conversion cannot automatically transfer a person into a different notified community, continuing social disadvantage calls for an evidence-based inquiry

LETTER & SPIRIT

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The invalidation of Tamil Nadu's 2024 order highlights the distinction between Scheduled Caste status and backward-class classification. Conversion cannot automatically transfer a person into a different notified community, but continuing social disadvantage calls for evidence-based inquiry.

Grounds for upholding HC ruling

On October 15, 2026, the Supreme Court, in *The Secretary to Government v. Sameer Ahmed N.*, upheld the Madras High Court's judgment invalidating Tamil Nadu Government Order dated March 9, 2024. The order sought to enable persons converting to Islam from Backward Classes (BC), Most Backward Classes (MBC), Denotified Communities (DNC) and Scheduled Castes (SC) to obtain Backward Class Muslim certificates and use the State's 3.5% reservation for BC Muslims.

The case arose from an application by a person born into a Hindu family who converted to Islam and sought a certificate as a Muslim. The High Court held that conversion did not make the applicant a member of any of Tamil Nadu's seven notified backward Muslim communities: Ansar, Dekkani Muslims, Dubekula, Labbas (including Rowthar and Marikayar), Mapilla, Sheikh and Syed. The Supreme Court affirmed that conclusion. The courts rejected the assumption that a former caste classification establishes membership of a different Muslim community. A person does not become a Lebbai, Rowther or Dekkani Muslim merely by converting. A Jamath may attest to conversion but cannot conclusively determine eligibility for a statutory reservation category. A community certificate records legal status; it cannot create it.

The State argued that a person who had enjoyed reservation should not lose every reservation benefit by converting. The concern is understandable, but the method was legally unsustainable. The order grouped persons from SC, BC, MBC and DNC classifications, without demonstrating a common social characteristic linking them to the seven notified Muslim communities. The verdict rejects automatic transfer of status; it does not, however, declare that Muslims can never qualify as a backward class.

Two constitutional routes

The Constitution treats Scheduled Caste status and backward class identification differently. Article 341 empowers the President to specify Scheduled Castes; Article 341(2) provides that Parliament may alter the list by law. Paragraph 3 of the Constitution (Scheduled Castes) Order, 1950 restricts SC status to persons professing Hinduism, Sikhism or Buddhism. Under the existing Order, conversion to Islam or Christianity does not preserve SC status merely because of former caste identity.

Backward-class identification follows another route. Articles 15(4) and 16(4) permit special provisions for socially and educationally backward classes and for their adequate representation in public employment. Article 342A, as amended by the Constitution (One Hundred and Fifth Amendment) Act, 2021, recognises States' power to maintain their own lists of socially and educationally backward classes for State purposes.

Backward classes need not be



The Supreme Court recently upheld the Madras High Court's judgment invalidating Tamil Nadu Government Order dated March 9, 2024. SUSHIL KUMAR VERMA

identified exclusively through Hindu caste names. Occupational groups, sects and communities among non-Hindus may qualify if constitutional criteria are met. But the State cannot establish qualification merely by assigning converts to an existing Muslim community without evidence of membership or a defensible basis for a fresh classification.

The Mandal Commission's indicators

The Second Backward Classes Commission, chaired by B.P. Mandal, offers a useful comparison. It used 11 indicators across social, educational and economic criteria. Social indicators carried three points each, educational indicators two, and economic indicators one, for a maximum score of 22. Its aim was to identify communities experiencing combined disadvantage, not simply reproduce caste names. The indicators need not be mechanically applied to every later classification. The enduring principle is that identification requires a reasoned assessment of disadvantage.

Caste has often been the principal organising unit of reservation. Once a caste is recognised as backward, an individual ordinarily proves membership rather than personal backwardness afresh. Yet the constitutional purpose is to advance socially and educationally backward classes, not preserve labels regardless of present conditions.

A person from a Hindu MBC may face inherited exclusion after conversion to Islam. But the former caste name does not establish membership of a Muslim community already notified as backward. Equally, the absence of caste hierarchy as a religious principle in Islam cannot prove, without inquiry, that inherited disadvantage has disappeared. The State should identify a recognisable group among converts, assess its continuing social and educational position, and explain why the evidence warrants inclusion in its backward-class list.

T.N. Commission's views

The Government Order followed a letter dated February 6, 2024, from the Chairman of the Tamil Nadu Backward Classes Commission. The letter of the Commission actually records the fact that one of the members had observed that for extension of benefit of consideration for a backward class Hindu to Islam, quantifiable data may be collected by the Government to show how many such people converted to Islam have availed

the benefits. This was not yet good enough. The State is reported to have said that it had considered the Commission's views, following stakeholder engagement and deliberation. Neither the Commission nor the State conducted any empirical inquiry establishing that converts from different Hindu classifications shared a relevant characteristic with the seven notified Muslim communities.

As described in the judgment, the recommendation proposed rationalising BC Muslim certificates for converts from specified Hindu classifications. It did not establish the link between a person's former classification and membership of a particular Muslim community.

A Hindu BC, an MBC member, a member of a Denotified Community and a person recognised as belonging to a Scheduled Caste do not necessarily experience the same disadvantage. Grouping them together cannot be justified solely because conversion may affect their previous reservation entitlement. The question is not whether the Government acted with benevolent intent, but whether its means were constitutionally permissible.

The Sachar Committee

The Sachar Committee, constituted in 2005 under Justice Rajindar Sachar, examined Muslims' social, economic and educational status. Its 2006 report documented disadvantage in education, employment and access to credit.

The report shows why social position must be examined through evidence rather than inferred from religious identity. It did not establish that Hindu converts from particular BC or MBC communities formed a distinct backward class under Tamil Nadu's framework. Nor does evidence of general disadvantage among Muslims prove membership of one of the seven notified communities.

Religious identity, caste history, occupation, location, educational attainment and representation in public employment may all be relevant. Their relationship, however, must be demonstrated rather than presumed.

Distinct legal inquiries

The National Commission for Religious and Linguistic Minorities, chaired by Justice Ranganath Misra, reported in 2007 and recommended delinking SC status from religion by deleting paragraph 3 of the 1950 Order. It argued that the treatment of historically disadvantaged

castes should not depend on the religion their members profess. The recommendation did not amend the Order; its restriction remains unless changed through the prescribed constitutional process.

The Commission led by former Chief Justice of India K.G. Balakrishnan, constituted in October 2022, was tasked with examining whether SC status could be accorded to persons claiming historical SC origins who converted to religions outside those specified in the Presidential Orders. Its remit concerns the consequences of caste-based disadvantage after conversion.

This is distinct from the Tamil Nadu BC Muslim issue. The SC question arises under Article 341 and the 1950 Order; backward-class identification arises under Articles 15(4) and 16(4), and requires identification of a socially and educationally backward class under the State framework. The Mandal, Sachar, Ranganath Misra and Balakrishnan exercises illuminate different questions and cannot substitute for one another.

A way forward

The ruling means that conversion to Islam does not automatically carry forward a former Hindu BC, MBC or DNC classification into BC Muslim status, or permit assignment to a notified Muslim community without a lawful basis for membership. The separate restriction governing SC status under the 1950 Order remains unaffected.

The larger question is whether the State should investigate evidence that converts continue to experience social exclusion, inherited disadvantage or educational deprivation. Invalidating automatic transfer does not establish that fresh classification is impossible. Tamil Nadu could commission an independent study through its Backward Classes Commission, examining educational attainment, representation in public employment, social acceptance, and the experiences of converts from different BC, MBC and Denotified Communities. The inquiry should not treat all converts as homogeneous. The State must define any proposed class, explain its relationship with existing classifications and demonstrate that it meets constitutional criteria.

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THE GIST

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GS 3: ECONOMY AND ENERGY

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Growing market: People wait for their electric scooters at a vehicle charging and battery-swapping station in Bengaluru. SUDHAKARA JAIN

Can India turn retrofitment into the next mobility revolution?

Unlike new EV manufacturing, which rewards scale and centralisation, retrofitment rewards distribution through local workshops, technicians and entrepreneurship; with the right training, neighbourhood mechanic shops can become certified retrofitters, absorbing the existing workforce

Jaideep Saraswat
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For decades, India's growth story has been written in a familiar script: take a technology invented elsewhere, strip it down, re-engineer it for cost, and scale it for the masses. Generic drugs, low-cost telecom, frugal automobiles are examples of this approach. It is a script that India has performed brilliantly. The question India must ask now is whether it is ready to move from optimisation to creation.

There are signs that it already has. Digital payments existed long before Unified Payments Interface (UPI), yet UPI reimaged the entire architecture of a transaction and created a model good enough that other countries want to emulate. Retail existed long before quick commerce, yet ten-minute delivery rewired consumer expectations in a way no global template had. In both cases, India moved beyond the familiar script and engineered a new category of implementation for existing systems. These models are suited to India's density, informality, and scale. Now, they are travelling across borders. Mobility presents a similar opening.

Vehicle retrofitment

Vehicle retrofitment sits at the centre of the new opportunity. Retrofitment, which converts an existing petrol or diesel vehicle into an electric one by replacing the powertrain, keeps the chassis intact. It is a useful technical fix, but a genuine

innovation opportunity arises from everything that needs to be built around it – from diagnostics for legacy vehicles, battery and power-electronics systems designed for retrofitted architectures, calibration software, testing protocols, safety certification, financing solutions, installation networks, and a skilled service workforce. Innovation arises from moving beyond a single product to creating an entire operating system for a new industry, whose definitive version is not built yet.

India has the raw ingredients to attempt it: a deep automotive supply chain, engineering talent that has already proven itself in frugal design, a fast-growing EV sector, credible software capabilities, and critically, a domestic market large and varied enough to pressure-test solutions.

The decentralisation edge

India's advantage is structural. Unlike new EV manufacturing, which rewards scale and centralisation, retrofitment rewards distribution like local workshops, local technicians, and local entrepreneurship. India has already shown what decentralised infrastructure delivery looks like at scale.

The PM Surya Ghar Yojna (PMSGY) on rooftop solar has now reached over 63 lakh households, built through a network of more than 34,000 empanelled vendors that has generated more than 4.6 lakh jobs across the solar rooftop value chain. Here is the blueprint for what a retrofitment ecosystem could look like,

encompassing not a few large factories, but thousands of certified local centres. Each centre can convert, service, and maintain vehicles while generating an average of at least 20 direct and indirect jobs.

India's automotive geography is not confined to its metros. Millions of vehicles run in Tier-II and Tier-III towns and rural India, held together by an enormous, largely informal network of mechanics, garages, and spare-parts dealers. With the right standards and training, that existing workforce can be absorbed, converting neighbourhood mechanic shops into certified retrofitters. That proximity between service providers and vehicle owners also solves a trust problem that new technologies always face.

An opportunity for the Global South

The opportunity extends beyond India's border. Countries across South Asia, Southeast Asia, Africa, and Latin America share the same three conditions that make retrofitment relevant in India. They have large fleets of ageing vehicles, price-sensitive consumers, and ownership cycles far longer compared to wealthier markets. Collectively, the Global South spends more than \$550 billion a year importing oil, a dependence that new EV sales alone will take decades to meaningfully dent, since new vehicles replace only a fraction of the fleet each year.

Retrofitment offers these countries a faster and cheaper route to displacing that fuel bill using vehicles already on

their roads.

This is precisely the shape of opportunity UPI has already proven India can capture. UPI-linked payments are now live in eight countries, and India has signed digital-infrastructure cooperation agreements with 23 more. This was realised not because India sold a payments app, but because it exported a replicable model and an implementation playbook that other countries could adapt to.

Retrofitment could follow the same arc. If India builds the certification standards, financing models, safety protocols, and training pipelines for retrofitment near home, and at scale, it will have effectively built an exportable system.

Other nations with similar vehicle fleets and fuel-import pressures would rally behind it.

None of this happens by accident. It requires India to treat retrofitment, not as a stopgap measure to be tolerated until new EVs become universally affordable, but as a genuine innovation category to be engineered deliberately. India has the right pieces, the engineering talent, the manufacturing base, the technician networks, and the domestic testing ground. Now it needs the intent to bring these pieces together for retrofitment at the scale of PMSGY.

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GS 2: INTERNATIONAL RELATIONS

INDIAN EXPRESS PAGE: 08

Rubio in Jamnagar, and a changing map of the new diplomacy



RAJA MANDALA
by C RAJA MOHAN

THE SIGNIFICANCE of US Secretary of State Marco Rubio's visit to the Reliance refinery in Jamnagar on Wednesday will extend beyond the familiar debate over India-US relations. Jamnagar offers a window into India's complex energy politics that has shaped Delhi's recent engagement with Washington, Moscow and Tehran. Rubio's interaction with the Tatas and the Adanis in Mumbai and his talks with Mukesh Ambani in Jamnagar also highlight the growing connection between Indian capital and the nation's foreign policy. As Indian companies acquire greater economic weight and wider global reach, they are becoming an important part of India's diplomatic arsenal, much like in other large nations.

The relationship between American business and foreign policy was captured in the adage "what is good for General Motors is good for America". General Motors no longer occupies the commanding position it once did, but the principle remains relevant. American finance and technology companies loom large in US foreign policy today.

The House of Morgan's involvement in the geopolitics of the early 20th century endures in a different form today. The CEO of JPMorgan Chase, Jamie Dimon, is received like royalty in Beijing and other capitals,

Meanwhile, the new tech bros of Silicon Valley have begun to exercise great influence in 21st-century world politics. Europeans pioneered this approach through their East India companies in the 17th century. Today, European governments work closely with their companies to win markets and contracts. China's "go out" policy since the late 1990s has encouraged Chinese firms to expand overseas, extending Beijing's economic reach and political influence.

The sight of Mukesh Ambani alongside world leaders might seem unusual to Indian audiences. But it reflects the culmination of a long-running change. A few years ago, foreign leaders visiting India routinely toured the Infosys campus in Bengaluru, when the country's IT companies were emerging as global players. Last October, British prime minister Keir Starmer visited Mumbai (not Delhi) and met Prime Minister Narendra Modi there. He engaged with Indian business leaders and struck deals with Bollywood producers on film production partnerships with British studios. Where Indian capital commands scale or possesses a distinctive advantage, it increasingly becomes part of the diplomatic equation.

At Jamnagar, that advantage lies in the old economy of hydrocarbons. The world's largest refining complex can process different grades of crude oil and supply refined products to markets across the globe. Reliance is a major crude importer and an important exporter of diesel, aviation fuel and other petroleum products. Its commercial decisions connect oil producers with consumers thousands of kilometres away. Jamnagar's importance has grown since Russia's invasion of Ukraine in 2022 and the disruption of oil supplies through the Strait of Hormuz. Ensuring in-

dia's energy security has been a central challenge for Indian diplomacy since the Russian invasion of Ukraine in 2022. The Biden administration sought to limit Moscow's revenues through a price cap, recognising that shutting out Russian oil would destabilise global energy markets.

Donald Trump reversed course, threatening sanctions on customers of Russian oil as part of his pressure tactics to promote peace in Ukraine. The US Congress compounded the uncertainty by passing legislation to impose sweeping sanctions on Russian oil exports. As turmoil in energy markets began to affect American domestic politics, Washington had to make a U-turn again. It eased some restrictions on Iranian oil and subsequently on Russian oil exports. Trump is now exploring bilateral energy deals with Russia as part of his renewed outreach to President Vladimir Putin.

Jamnagar has been at the centre of these shifting currents in oil politics. Its ability to switch suppliers and redirect products across markets demonstrates the value of a sophisticated refiner with global reach. As Washington gained control over Venezuelan oil exports, Jamnagar emerged as a preferred destination for the country's heavy crude. Reliance's engagement with the US is also becoming more direct. In March, the US announced the launch of a new refinery in Brownsville, Texas, to be backed by Reliance.

Washington wants greater energy cooperation with India and more Indian investment in the US. Reliance offers a substantial private-sector partner. The question is how Delhi can turn the company's growing importance in American calculations into an asset for India-US relations.

Business has played a role in Indian diplomacy before. The Hindu-

as used their commercial connections with Iran to facilitate a rapprochement between Delhi and Tehran after the 1973 oil crisis. After the 1998 nuclear tests, Delhi turned to the Hindus to facilitate engagement with British prime minister Tony Blair. American businesses, too, have been important partners in overcoming India's difficulties in relations with Washington. Companies such as General Electric helped build support in the US for better ties with India during the 1990s. Beijing, meanwhile, has long relied on American business to help moderate tensions with Washington.

The international system has never been shaped by states alone. Capital and technology have long influenced the choices available to governments. Capital cannot replace the state as the principal actor in international relations, but it is becoming an increasingly important part of the diplomatic process around the world. Sensible states prevent the excessive concentration of capital at home and set the terms for its global role. As Indian companies acquire the scale to operate across borders and navigate geopolitical turbulence, they will become more consequential actors in India's external relations.

Rubio's visit to Jamnagar is a reminder that understanding contemporary Indian foreign policy requires a better appreciation of the intricate and inseparable relations between capitalism and modern international relations. That, in turn, means tempering Delhi's abstruse foreign policy debates with Mumbai's commercial logic and Bengaluru's technological imperative.

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• ECONOMICS

The economic mess at the heart of France's protests



UDIT MISRA

FRANCE, EUROPE'S second largest economy and one of the five permanent members of the United Nations Security Council, is burning after violent protesters unleashed some of the worst episodes of vandalism in French history.

President Emmanuel Macron, who seemed to have been taken by surprise, condemned the violence, and urged calm and order. Official figures suggest that more than 5,00,000 mostly young demonstrators took to streets — unofficially estimates go up to 8,00,000 — with thousands arrested.

The protests that started more than a month ago with students demanding better conditions in schools have morphed into bigger calls for better living conditions.

To be sure, street protests, often violent, happen regularly enough to be viewed more as a feature of the French Republic than a bug. It is noteworthy that this is the case even though France has one of the most centralised governments anywhere in the world, with the national government holding much of the power.

The scale of the violence, however, has left both policymakers and observers around the world stunned. What's more, with the next presidential elections just six months away, and a country that looks deeply divided between far-right and far-left political views, the apprehension is that these protests and violence may happen again.

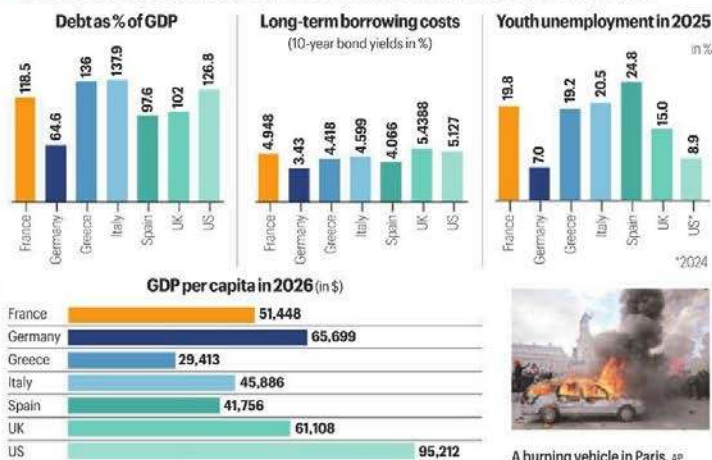
There are two ways to look at this crisis in France.

The people's concerns

From the perspective of the protestors, there are concerns about the high cost of living, which is, in turn, a shorthand for the combined effect of high and persistent inflation, high unemployment, inadequate wage increase, and insufficient support from the government for the welfare state.

Data from International Monetary Fund (IMF) and Organisation for Economic Co-operation and Development (OECD)

• KEY ECONOMIC INDICATORS: HOW FRANCE MATCHES UP TO ITS PEERS



SOURCE: OECD, IMF, INVESTING.COM, INDIAN EXPRESS RESEARCH

shows that while inflation hasn't been as high in France as it has been among its peers — Germany, Spain, UK, Italy, Greece and the US — it is the weak economic growth and high unemployment that have been the real causes of worry.

The IMF just revised downwards the growth rates for 2026 and 2027 to as low as 0.4% and 0.7% respectively.

More broadly, France's growth rate completely faltered since the Global Financial Crisis of 2008, and this has had its impact on per capita incomes. In 2008, for instance, France's per capita GDP was \$45,754. In 2026, it is \$51,448. That's an average annual increase in incomes of less than even 1% each year over the last 18 years. It is unsurprising that the public will grow restless and demand more state support.

The other side of weak growth is high unemployment. Overall unemployment is around 8% but among the youth it shoots up to almost 20%. The picture is even more bleak among migrants coming from Africa. Data on wages also paints a similar picture with France lagging behind its peers.

Weak growth, high debt, joblessness and a welfare state that is not working out for the young; France's problems are many and solutions are not easy

Greece and Italy that were until a decade ago, the real problem economies.

Now France, instead of being a large, stable economy in Europe, is fast heading towards a possible debt crisis of its own. That's because its borrowing costs are spiking just as its overall debt has reached uncomfortable levels. As a result, the government has to now shell out more and more money each year from its budget just to pay the interest on past loans.

It is also noteworthy that investors are taking into account the political instability in France (reflected in the rising bond yields). President Macron is becoming increasingly ineffective, and most future presidential candidates are deeply polarising figures. Political instability is a tell-tale sign that the reforms needed to course-correct may not happen in a hurry.

A difficult solution

The charred remains of town halls, looted high-street shops and images of police cracking down may suggest an economy performing far worse than what the data shows. As things stand, France is still not where Greece or Italy were during the Eurozone sovereign debt crisis in the early 2010s. However, it will be there if it doesn't take corrective action.

The central problem is this: Over the decades, the French have got used to an expansive welfare state, but since the Global Financial Crisis of 2008, France's growth has not kept pace with its ambitions of welfare.

Given its inability to grow fast, France needs a two-pronged approach. One, reform its economy to unleash a new wave of growth. A government-dominated economy is not delivering growth at the moment.

Two, cut down on excessive expenditure. For instance, thanks to the welfare guarantees on health and pensions as well as the demographic change (read ageing), France is looking at a scenario where a growing number of old will be dependent on the taxes levied on a relatively smaller number of young workers. Efforts to raise the retirement age — thus saving the outgo on pensions — have been thwarted.

In short, France has to figure out a way to grow fast to avoid a debt crisis, and while it tries to do that, it must control welfare expenses. Otherwise, it is set to receive more rude shocks.

The government's concerns

From the perspective of the government, the picture is equally dire but the variables are different. The French government has been borrowing more and more each passing year — the fiscal deficit this year is pegged at 5.4% of the GDP — thus adding to a growing mountain of debt. Total debt as a percentage of GDP is now more than 118%.

Making matters worse is a stagnant economy. Thanks to a lack of growth, the French government does not have enough tax revenues to support the welfare demands of the public. That, in turn, forces it to borrow more. As things stand, the French government is already the overwhelming player in the French economy, accounting for about 57% of the GDP.

Unsurprisingly, investors are demanding a higher rate of return for lending money to the French government. They yield on 10-year bonds by the French government are now close to the 5% mark. Not only is this much higher than the recent past, it is also higher than many European peers such as



A burning vehicle in Paris, AP

The central problem

Over the decades, the French have got used to an expansive welfare state.

But since the Global Financial Crisis of 2008, France's growth has not kept pace with its ambitions of welfare.

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• SCIENCE

A piece of Mars's moon: Why Japan has sent a mission to Phobos

Arav Shah

New Delhi, October 20

THE JAPAN Aerospace Exploration Agency (JAXA) on Tuesday launched a rocket towards Mars at 1:11 am IST.

The mission, termed **Martian Moons Exploration (MMX)**, aims to study the origin of the Martian moons Phobos and Deimos — named after the sons of the Greek god of war, Ares, who is better recognised by his Roman name, Mars. The mission aims to retrieve at least 10 grams of physical samples from Phobos and return them to Earth by 2031. Should the mission be successful, Japan will be the first country to return samples from a moon of Mars. But why is the mission interested in exploring the moons instead of the red planet itself?

First, why do scientists want to study the moons of Mars?

Phobos and Deimos were first discovered by the American astronomer Asaph Hall in 1877. These two moons have held the interest of the scientific community because their origins are not yet discovered. There are, however, two theories, according to NASA.

The first explanation proposes that both moons are relics of asteroids that were cap-

tured by the gravitational pull of the planet. The irregular shapes of the two, combined with certain surface characteristics, make this theory a possibility. But capturing asteroids into stable orbit around a planet is no simple task. Scientists are also yet to establish whether it explains the movement of both moons and their other characteristics.

The other working theory states that both moons were formed due to a collision of a large celestial body or asteroid into Mars. As debris was ejected into the planet's orbit, it came together over time to form both moons. Should this explanation turn out to be correct, the composition of the moons may reveal clues about Mars itself.

Mars' gravity makes landing on the planet and returning samples a challenge. Phobos, however, has much weaker gravity,

How is the mission expected to proceed?

The spacecraft is scheduled to reach Mars around August 2027 and return in 2031. Following its arrival near Mars, it shall enter quasi-satellite orbit around Phobos. This will allow it to remain close to the moon while conducting observations of its topography and chemical composition. These details shall also help scientists determine a suitable landing spot.

Mission specs

● The MMX mission is carrying 13 scientific instruments, including cameras, spectrometers and devices to measure the surface and composition of the Martian moon Phobos.

● One of its key components is the IDEFIX rover, developed jointly by CNES (France) and the DLR (Germany). The main craft will deploy the rover on Phobos before it lands.



The Japanese rocket carrying the MMX mission takes off Tuesday. AP

The spacecraft is made up of three main modules — propulsion, exploration (a rover) and sample return — which will support the journey to Mars, surface operations and eventual return to Earth. The mission also plans to observe Deimos during a flyby. MMX will test technologies needed for future round-trip missions to the Martian system, including autonomous navigation and landing in extremely weak gravity.

Why does it matter?

The MMX mission comes at a time when major space powers are looking to develop

their capabilities for planetary exploration. Importantly, the mission shall help assess whether Phobos may be able to serve as a staging point for crewed missions to Mars.

Its weak gravity means that landing and taking off from the moon requires a fraction of the fuel needed for a descent on Mars.

The MMX mission and its agenda are "essentially an exercise in leadership, technology autonomy and improving space cooperation between nations", Ashwin Prasad Rao, Staff Research Analyst at Takshashila Institution, told *The Indian Express*.

Although largely headed by JAXA, the mission also includes the European Space Agency, NASA, CNES (France), DLR (Germany), and the Australian Space Agency. The allows nations to share the cost of innovation while advancing shared goals. In fact, NASA's Mars sample-return mission — aimed at bringing back surface soil deposits from the planet — was scrapped earlier this year by US Congressional budget action which dictates federal spending.

Japan is, "climbing a ladder that helps position the nation as one of the leaders in planetary exploration," Rao said. "It (Japan) is already known for expertise in sample-return missions. It is now signalling that it is one of the scientific great powers which belongs at the proverbial table".