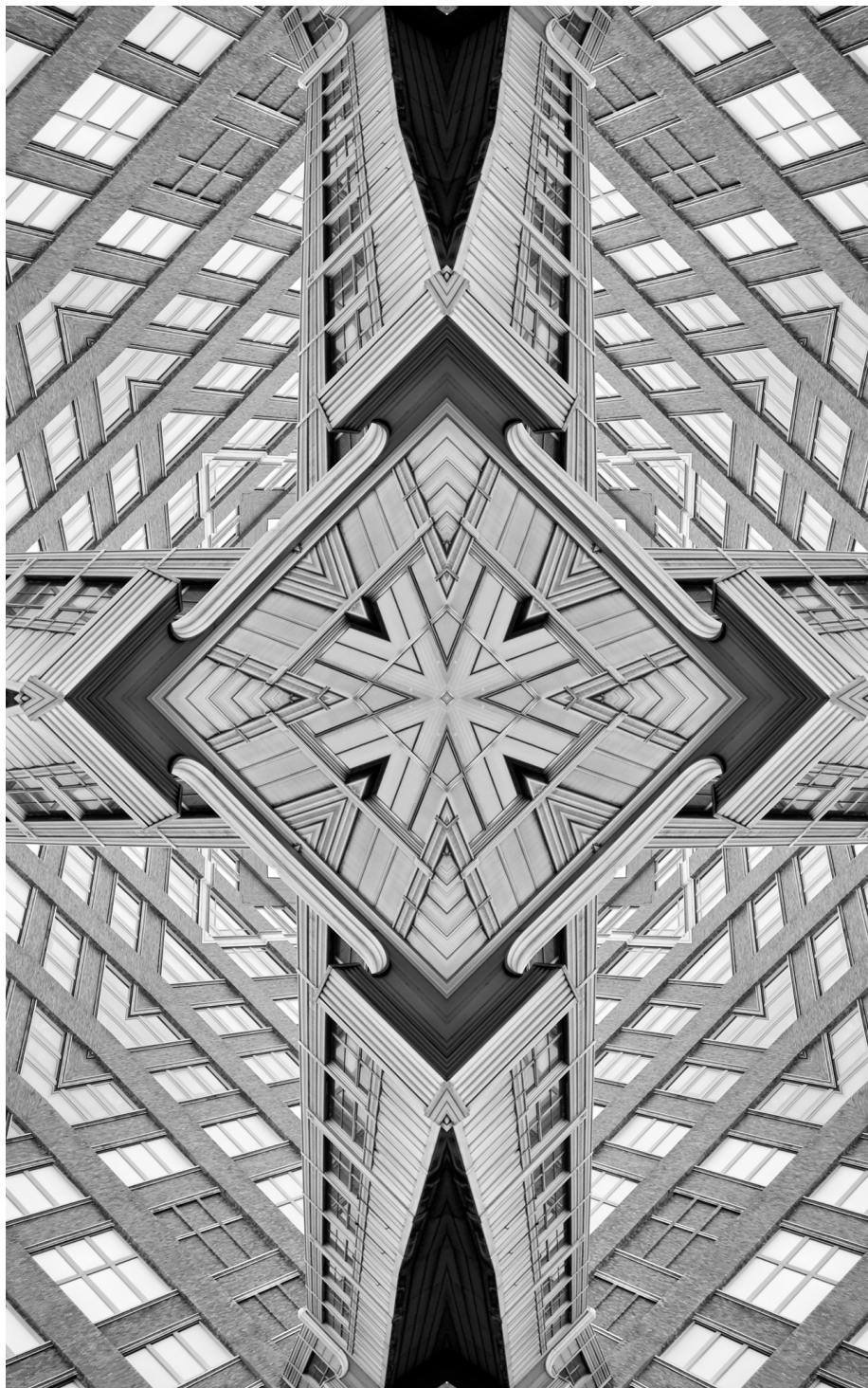


Issue

Brief

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A New EU-India Strategic Agenda in 2025

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Abstract

There is a strong case to be made for a deeper European Union (EU)-India partnership against the backdrop of global uncertainties and ongoing wars, an assertive China, and the likelihood of a more transactional United States (US) under Trump 2.0. Meanwhile, the EU-India Roadmap to 2025 has run its course, and the EU-India summit of 2025 could be an opportune moment to release a fresh blueprint for cooperation. As the new European Commission's agenda springs into action and Ursula von der Leyen and her College of Commissioners prepare for their visit to India in late February, this brief provides recommendations on what a new strategic EU-India agenda should prioritise.

The Roadmap to 2025¹ has guided the EU-India Strategic Partnership since it was agreed upon during the 15th EU-India summit in 2020. As the roadmap runs its course, European Commission (EC) President Ursula von der Leyen’s political guidelines for the incoming EC mention the intent to propose “a new Strategic EU-India Agenda”.² Von der Leyen is scheduled to visit India in late February 2025, on her first trip overseas following her new mandate. In a rare occurrence, she will be accompanied by her College of Commissioners, which, according to Trade Commissioner Maroš Šefčovič, would send “a very strong political signal”.³ Later on in the year, an EU-India summit is likely to take place.

As the EU and India return to the drawing board, both are grappling with a turbulent world characterised by parallel wars, the potential consequences of a second Donald Trump presidency, and an increasingly assertive China. Europe is witnessing its first war on European soil since the Second World War, and its trifecta of prosperity through cheap Russian energy, American security, and Chinese markets has been upended, followed by the EU’s pledges to become a strategic global actor headed by a “geopolitical” Commission. This volatility has only strengthened the case for a deeper EU-India partnership amidst greater strategic convergences.

Contrary to some expectations of a breakdown in relations because of India’s position of “active neutrality” on the Russia-Ukraine war, the EU and India have expanded their mutual diplomatic and political outreach. Increased engagements have resulted in a better management of differences as well as greater familiarity with each other’s perspectives and compulsions, including New Delhi’s military dependence on Moscow and concerns vis-à-vis China.

EU-India ties in technology, security, and trade have also expanded due to the growing salience of economic and technological security. The EU-India Free Trade Agreement (FTA) negotiations were restarted in 2022 and a Trade and Technology Council (TTC) was launched in the same year. Shared concerns regarding stability in the Indo-Pacific region and a quest to de-risk, i.e., reduce lopsided critical dependencies, emerged as a key factor for a closer EU-India rapprochement. Since Roadmap 2020, which was released a month after the Galwan valley clashes with China, the China outlooks of both Brussels and New Delhi have fundamentally shifted, and Beijing has emerged as an important factor in India’s recalibrated ties with Europe.

Introduction

The Roadmap to 2025 has a wide scope, covering trade and investment, urbanisation and transport, culture, multilateralism, human rights, and civil society dialogues. In contrast, a new EU-India strategic agenda would benefit from being more targeted and operational. The following paragraphs outline the key areas that a new agenda should prioritise.

A new EU-India strategic agenda and roadmap should have clear and unequivocal language on concluding the FTA. The bilateral relationship's movement beyond trade and into strategic areas has ironically also prompted a fresh look at trade. FTA negotiations were resumed in 2022 after being suspended for nearly a decade due to seemingly irreconcilable issues. A restructuring of the global economic order and quests to diversify and de-risk in favour of like-minded nations have resulted in strong geopolitical underpinnings to the FTA; in January 2025, Indian Commerce and Industry Minister Piyush Goyal held wide-ranging positive trade talks with his European counterpart Šeřčovič in Brussels.⁴

Yet, the FTA negotiations remain complex, and longstanding contentions with regard to sustainability standards, worker mobility, agriculture and dairy sectors, professional services, and high tariff and non-tariff barriers persist even after nine rounds. Moreover, India is concerned about new EU regulations such as that on Deforestation-Free Products (EUDR)⁵ that could impact an estimated US\$1.3 billion worth of Indian exports to the EU.⁶

In 2023, the EU released an Economic Security Strategy⁷ to address dependencies and supply chain risks. It has also embarked on a competitiveness agenda⁸ encouraged by the recommendations in the landmark Draghi report^{a,9} and finalised a long-awaited FTA with the Mercosur bloc of South American nations. Meanwhile, India has entered into trade agreements with Australia, the United Arab Emirates (UAE), and the European Free Trade Association (EFTA) bloc.¹⁰ None of these agreements are as ambitious and wide-ranging as a comprehensive EU-India FTA, but there are promising signs. India's agreement with the UAE includes a chapter on government procurement¹¹ and the one with Australia includes a working group on professional services.¹² In 2023, the Bar Council of India decided to allow foreign law firms to practice in India, albeit with caveats.¹³ These developments demonstrate a newfound flexibility on India's part.

In this context, the EU needs to reconsider whether non-trade issues such as labour standards and sustainability clauses in trade agreements are appropriate methods of achieving environmental and other goals in a fraught geopolitical environment, or whether a more compact deal may be more pragmatic. Officials from India's Ministry of Commerce and Industry and the EU's Directorate

a Mario Draghi, former Italian Prime Minister and European Central Bank President, was commissioned by von der Leyen to write a report on European competitiveness. The report was published in September 2024.

General Trade would be well placed to consider the wider geoeconomic picture rather than being driven by a microscopic, sectoral analysis.

Despite experts calling for a more realistic deepening of EU-India trade outside the scope of the FTA due to the complexity of negotiations,¹⁴ it is important to remember that the negotiations were re-opened with the aim of reaching a conclusion. If they fail again, an incomplete and overhauled FTA would undermine trust in the ability of both parties to work through differences and damage other aspects of bilateral cooperation.

President Trump has already imposed tariffs of 25 percent on European steel and aluminium imports,¹⁵ of which 25 percent go to the US. India, too, is bracing for economic uncertainties under Trump 2.0. Meanwhile, ties with China remain strained, with the EU and China imposing tariffs on each other based on allegations of unfair competition;¹⁶ von der Leyen's guidelines explicitly mention China's "aggressive posture and unfair economic competition."¹⁷ For New Delhi, despite disengagement at the borders, high levels of mistrust mean that a return to the pre-2020 paradigm is unlikely. Given their unreliable relations with top trading partners, the EU and India would benefit from insulating their trade and hedging against uncertainties by increasing trade with each other, especially since neither is part of large agreements like the Regional Comprehensive Economic Partnership or the Comprehensive and Progressive Agreement for Trans-Pacific Partnership.

India's merchandise exports to the EU have grown at a slow pace, from 1.1 percent in 2002 to 2.2 percent in 2021, which is not commensurate with India's growth story. On the other hand, China's exports to the EU grew from 7.8 percent in 2002 to 22.3 percent in 2021.¹⁸ While, in 2023, the EU was India's largest trading partner, India was the EU's ninth largest trading partner, accounting for 2.2 percent of the EU's total trade in goods, well behind the US at 16.7 percent and China at 14.6 percent.¹⁹ An expansion of Indian exports to the EU could help drive India's goal to increase exports US\$2 trillion by 2030, given the EU's 28-percent share in global imports.²⁰

The size of the EU economy is over four times that of India's, but while the former is stagnating, India is growing and poised to become the world's third largest. According to estimates, 140 million additional households will join the middle class by 2030,²¹ creating imperatives to "integrate their combined \$24 trillion market."²²

Pursuing a De-Risking Agenda

Europe and India are seeking to restructure supply chains to enhance resilience and de-risk from China, particularly in strategic dependencies such as green technologies, critical minerals, batteries, and semiconductors. In 2021, Chinese manufacturing accounted for over 30 percent of global output, whereas India's remained under 3 percent.²³ India has nevertheless emerged as a potential alternative to China to diversify trade and re-align supply chains as part of the West's China+1 strategy. However, increased Foreign Direct Investment (FDI) flows are needed for India to take advantage of this opportunity and fulfil its aspirations of becoming a production hub. Therefore, an investment protection agreement to boost investor confidence is as important as an FTA. India terminated most of its Bilateral Investment Treaties (BITs) in 2016, which also hinders further investment.^b However, Finance Minister Nirmala Sitharaman's proposal that investment treaties be kept separate from future trade agreements may not bode well for the EU, which favours comprehensive agreements.²⁴

Both the EU and India are heavily dependent on Chinese imports for the supply of critical raw materials (CRMs), including lithium, rare-earth minerals, and nickel, which are necessary for technologies enabling the green transition. The EU adopted the CRM Act²⁵ in 2023, while its Net-Zero Industry Act²⁶ aims to boost local production of green technologies. Both EU and India are part of the Minerals Security Partnership (MSP),²⁷ through which they can explore ways to cooperate on mineral extraction, processing, and innovation technologies. The India-Japan-Australia Supply Chain Resilience Initiative (SCRI)²⁸ could serve as a template to partner with third countries through minilateral formats. For instance, the EU's and India's bilateral partnerships with Australia in this area could be converted into a trilateral framework. An India-EU-Japan framework on technologies relating to mining and exploration can also be explored.

An EU-India Memorandum of Understanding on semiconductors²⁹ has already been signed to strengthen supply chains and boost research and development (R&D) complementing Indian government incentives to boost domestic semiconductor production and the European Chips Act.³⁰ Another area to explore is telecommunications; Margrethe Vestager, former EU Commissioner for Competition, highlighted India's potential to offer trusted telecommunications vendors for Europe as European member states limit Huawei's presence.³¹ In the pharmaceuticals sector, the majority of Active Pharmaceutical Ingredients (API) still come from China. More needs to be done

b "In 2016, the Indian government announced its decision to unilaterally terminate all its bilateral investment treaties (BITs) with other countries. This move, aimed at re-establishing sovereignty and asserting control over investment disputes, was met with criticism from the international business community, which saw it as a risk to the stability and predictability of the investment climate in India." See: <https://www.orfonline.org/research/india-and-the-european-union-in-2030>

Pursuing a De-Risking Agenda

to secure pharmaceutical supply chains and reduce this dependency by using India's manufacturing capabilities and Europe's tech capacities.

There are several areas where the EU and India have taken similar steps, such as implementing FDI-screening mechanisms to scrutinise risky investments. There are also opportunities to coordinate action to reduce vulnerabilities against potential economic coercion.

Energising the TTC

In 2022, the EU-India TTC was established to tackle challenges at the “nexus of trade, technology and security” and facilitate cooperation through three working groups:³² on strategic technologies and digital governance; green and clean energy technologies; and supply chain resilience and trade. Despite being a promising format, the TTC has accomplished little,³³ especially when compared to other formats such as the India-US initiative on Critical and Emerging Technology. The recently created India-UK Technology Security Initiative is also garnering more attention.

A new EU-India strategic agenda should prioritise engagement through the TTC and utilise its potential to contribute to Indian and European economic security and technological resilience. Despite divergent approaches to digital standards and data governance, the EU and India can collaborate and exchange practices to create frameworks on 6G, Artificial Intelligence (AI), and cybersecurity based on democratic principles and societal impact, drawing from the EU’s regulatory expertise. Projects such as mapping supply chain vulnerabilities and capacities in the technology sector can be carried out as part of the de-risking agenda. The TTC should prioritise areas such as telecommunications as well as green technologies, where the second Trump administration may be reluctant to focus their efforts. The working group on trade, investment, and supply chains should complement the FTA and investment protection negotiations. The TTC should operate on the basis of concrete deliverables and timeframes.

Ramping Up Security and Defence

Both the EU and India seek an open and inclusive rules-based order in the Indo-Pacific region, where geopolitical tensions and disputes have intensified. Maritime security has become a key area of EU-India cooperation, with core interests in ensuring freedom of navigation and open sea lanes of communication in the Indian Ocean region, which the EU's Maritime Security Strategy³⁴ considers to be the gateway to the Indo-Pacific.

The EU and India have an annual maritime security dialogue. Additionally, the EU is a dialogue partner in the Indian Ocean Rim Association, and India's participation in the Permanent Structured Cooperation is under consideration. Joint maritime exercises between the Indian Navy and the European Union Naval Force (EUNAVFOR) have taken place in the Gulf of Aden and the Gulf of Guinea, in addition to cooperation with the EU's Critical Maritime Routes in the Indian Ocean (CRIMARIO) and Enhancing Security Cooperation in and with Asia (ESIWA) projects. India is also complementing the EU's Mission Aspides in the Red Sea, where the Indian Navy sent 12 warships to protect shipping routes from Yemen's Houthi rebels. The EU's Coordinated Maritime Presence tool,³⁵ which has already been deployed in the North-Western Indian Ocean, is facilitating effective and sustained deployment of the military assets of member states.

The EU and India should harness their respective non-confrontational approaches and further consolidate their maritime partnership. This would include cooperating on countering illicit activities, maritime domain awareness, capacity building for island and coastal states with limited resources, and information sharing such as through the EU's Indo-Pacific Regional Information Sharing programme.

In 2023, the EU's newly appointed military attaché to India took charge,³⁶ reflecting an expanded ambit of security cooperation besides security and defence consultations. Defence cooperation, including sales and co-production with member states such as France, Spain, and Germany, has scaled up amidst New Delhi's diversification of military suppliers away from Moscow. For India, the transfer of military technologies is key, where Europe can play a role despite limits on the EU's security and defence mandate. As the EU invests more in its defence capabilities and focuses on building "a European Defence Union", a comprehensive EU-India security pact could be explored, such as the one signed between EU and Japan in November 2024³⁷ to tackle a wide spectrum, from defence industry initiatives to maritime and space security.

Ramping Up Security and Defence

In December 2024, the EU and India decided to institute a strategic foreign policy dialogue³⁸ involving Indian External Affairs Minister S. Jaishankar and his new EU counterpart High Representative Kaja Kallas. With the EU launching the new position of Defence Commissioner, currently held by Andrius Kubilius, former Prime Minister of Lithuania, which follows a values-based foreign policy, this would be a good time to initiate a traditional 2+2 dialogue mechanism with foreign and defence ministers from both sides.

With the US stepping back from its commitments to the Euro-Atlantic, Europe is being compelled to take its security into its own hands and invest more in NATO. Thus, despite linking the Euro-Atlantic and Indo-Pacific theatres, the EU should measure its bandwidth for the Indo-Pacific and its financial resources to provide a clearer picture to partners.

Other Priority Areas for Cooperation

Another strategic area of cooperation is connectivity, where the EU and India already have a partnership³⁹ based on core sustainability and democratic principles, furthered by the EU's Global Gateway initiative to build sustainable physical, digital, energy, and health infrastructure in developing countries. The EU and India have identified projects in South Asia and India's North East, and their implementation should be prioritised to counter Chinese influence through the Belt and Road Initiative in the region.

Developing the India-Middle East-Europe Economic Corridor (IMEC) should also be a priority despite financing challenges and instability in the Middle East temporarily derailing plans. From traditional logistics and transport infrastructure to pipelines to transport green hydrogen, data and electricity cables, the project would provide multiple geopolitical benefits for India and Europe by enhancing economic linkages and energy security. In early 2024, India and the UAE signed a formal pact on IMEC, and French president Emmanuel Macron appointed a special envoy on the project.⁴⁰ Prime Minister Modi's visit to Marseille in February 2025, which is being touted as IMEC's potential entry into European markets,⁴¹ is the latest indication of plans to proceed with the Corridor's development despite regional tensions.

The EU and India also have a Clean Energy and Climate Partnership, with a deeper agenda outlined for 2025-2028 in the areas of green hydrogen, smart grids, offshore wind, energy efficiency, and regional energy connectivity.⁴² Considering the disparities in technologies and finance between the EU and India, technology transfers and climate financing should be prioritised to support Indian companies and stakeholders towards a green transition. For instance, the EU is supporting the development of India's Green Steel Mission⁴³ through partnering on R&D and clean steel projects to decarbonise India's steel sector, which contributes to almost 12 percent of the country's greenhouse gas emissions.⁴⁴ The EU's green innovations can be scaled up in India to enable less carbon-intensive production processes with green alternatives. Such collaboration may also reduce differences on the EU's Carbon Border Adjustment Mechanism, through which the EU aims to levy tariffs on imports based on their emissions and which India perceives as a substantial trade barrier. The TTC working group on clean and green technologies should be harnessed to support joint research on clean energy projects.

Other Priority Areas for Cooperation

Cooperation on shared interests such as hybrid threats can also be explored. India was the first country to ban the Chinese app TikTok as early as 2020. Europe is also debating this approach, given the associated risk of Chinese disinformation in European societies. The EC has prioritised combating disinformation and widened its ambit beyond Russia to include China as a source of disinformation and foreign interference.⁴⁵ To counter these issues, the EU has developed a European Democracy Shield.⁴⁶ Additionally, it can work with like-minded partners like India to share information, especially with the Russia-China alliance likely to exacerbate the threat. Von der Leyen's political guidelines also mention the need for a new counterterrorism agenda with a "stronger approach to terrorist financing and anti-radicalisation",⁴⁷ which would be of interest to India.

The Roadmap to 2025 mentions migration and mobility, including the availability of skills and labour market needs. India has already signed bilateral migration and mobility agreements with several European countries based on complementarities in terms of an ageing population and ample manpower. Even though visa quotas are mainly a member-state competency, at an EU (and Schengen) level, the issuance of (short-term) visas for Indians visiting Europe should be streamlined and made easier. As destinations such as Azerbaijan and Russia open visa-free travel for Indian citizens, Europe's complex visa processes are in need of an overhaul.

With the lack of any trillion-dollar companies, both the EU and India have lagged in the innovation space compared to the US; the Draghi report also emphasised the need for innovation. European value, for instance, is derived from traditional sectors such as automobiles and pharmaceutical companies rather than innovation or tech. An innovation-led partnership that boosts collaboration between startups and scaling in innovative technologies from both regions should be galvanised under the TTC.

Track-2 diplomacy, which often complements official channels of communication, has been instrumental in augmenting understanding on strategic issues such as diverging positions on the Russia-Ukraine war. The Roadmap to 2025 mentions enhancing "the exchange of ideas on issues of core relevance for the EU-India strategic partnership in the context of the EU-India Think Tank Twinning Initiative."⁴⁸ However, the Think Tank Twinning Initiative, which brought together policymakers, think tanks, and academics from both sides to research and deliberate on core issues in the partnership, has been scrapped.

Other Priority Areas for Cooperation

The initiative should be rekindled given the need for both the EU and India to invest more in developing expertise and knowledge about each other.

The Russia-Ukraine war prompted the EU to also pay attention to sensitivities elsewhere, particularly in countries in the Global South, many of which did not automatically empathise with European perspectives on the war.⁴⁹ This has also resulted in a better understanding of the choices and compulsions driving Indian foreign policy, coupled with European efforts to court the Global South. India-EU connectivity projects, including IMEC, and digitalisation by replicating the India Stack in emerging economies can help Europe strengthen ties with the Global South. A stronger EU-India partnership across trade, climate, energy, and technology can help bridge the North-South divide.⁵⁰

Both the EU and India will be closely watching the development of the Russia-China “no limits’ friendship”⁵¹ that was signed in February 2022, just before Russia invaded Ukraine. Despite divergences on Russia, the EU and India have similar concerns emanating from a consolidation of the Russia-China alignment. Going forward, mapping and mitigating risks and intelligence-sharing in this context could become a focal point of cooperation.


A prosperous India is in Europe's interest—as a balancer in the Indo-Pacific, as a market for economic diversification and relocating supply chains, and as intrinsic to global climate solutions. At the same time, Europe can facilitate India's modernisation, integration into global supply chains, and its path to a sustainable *Viksit Bharat* through providing investment capacity, technological expertise, and support in the green transition. Focusing on these synergies can help both New Delhi and Brussels to achieve their objectives.

A concluded FTA, an energised TTC, and a plausible IMEC can strengthen their respective technological and economic resilience and overall strategic autonomies in favour of a more balanced global power dynamic as well as serve as geopolitical hedges against the backdrop of unpredictable American policies. Moreover, when it comes to China, the EU and India are keen to charter their own paths of de-risking and economic diversification rather than adhere to Washington's imperatives. However, developments could go either way: transatlantic uncertainties could push Europe to consider a rapprochement with China (with reports of this being already underway⁵²), and India may align more closely with the US under Trump. It is up to the EU and India to transform these uncertainties into opportunities and champion their mutual partnership.

Building closer EU-India ties will also require enhancing trust. Reports of India selling dual-use tech to Russia⁵³ could have negative consequences for the relationship. Meanwhile, India will be paying close attention to the EU's China policy, from the more hawkish attitudes of the Nordic and Baltic states to the more ambiguous postures of Germany and France.⁵⁴ The Commission should continue to be in the driving seat and promote greater coherence amongst EU member states in their approaches to China.

On trade, sustainability, and normative divergences, a more accommodating and equitable attitude would not only aid the partnership but also set a template for other North-South partnerships. As Jaishankar has emphasised, “Today the relationship between India and the European Union is not only consequential for each one of us but also for the world,”⁵⁵ and an “important stabilising factor in a volatile and uncertain world.”⁵⁶

Conclusion

The year 2024 marked the 20th anniversary of the EU-India Strategic Partnership. In 2025, the strategic argument for deeper cooperation at the intersection of trade, technology, connectivity, and security has only intensified against the backdrop of increasing global fragmentation. As the relationship embarks on a new decade of cooperation, action and delivery must match promise and rhetoric. It is up to both partners to hold the relationship accountable and move beyond the traditional narrative of untapped potential. 

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