



GLOBAL POLICY PERSPECTIVE REPORT

The EU–India Free Trade Agreement: Beyond Trade Foreign Policy, Geopolitics and Strategic Autonomy in a Reshaping Global Technological Order

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EDITORIAL CREDITS

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No. 6/2026

The EU–India Free Trade Agreement: Beyond Trade

Foreign Policy, Geopolitics and Strategic Autonomy in a Reshaping Global Technological Order

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Publication Details

Series: Global Policy Perspective Report

Report No.: 6/2026

Publication date: September 2026

Place of publication: Stockholm, Sweden

Language: English

Published by

European Institute of International Studies Press - EIIS Press

Stockholm, Sweden

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Recommended Citation – APA 7th Edition

Torres Jarrín, M., Rubio, I., & Poojary, P. V. (2026). *The EU–India Free Trade Agreement: Beyond Trade: Foreign Policy, Geopolitics and Strategic Autonomy in a Reshaping Global Technological Order* (Global Policy Perspective Report No. 6/2026). European Institute of International Studies Press.

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1. Introduction

Over the last two decades, India has undergone a profound economic, technological and geopolitical transformation that has substantially strengthened its international standing. With a population of over 1.4 billion, a rapidly expanding economy and a growing capacity to exert influence in the main multilateral forums, the country is establishing itself as one of the principal centres of power in the emerging multipolar order and as an increasingly significant player in shaping the future architecture of global digital governance (Torres Jarrín, 2025a).

From an economic perspective, India has established itself as one of the most dynamic economies, driven by growth in domestic consumption, investment in infrastructure, digitalisation, the strengthening of its industrial base and the development of high value-added sectors. This development, combined with its large population and the expansion of its scientific and technological capabilities, is progressively increasing its influence in the global economy, its ability to attract investment and its integration into global value chains, whilst reinforcing its role as a hub for innovation and production.

India's rise, however, goes far beyond the economic sphere and is reflected in a growing capacity for political, diplomatic and strategic influence. Its foreign policy is structured around the principle of strategic autonomy, which enables New Delhi to maintain significant relations with various centres of power simultaneously without being bound by rigid frameworks of alignment. This approach is reflected both in its active participation in forums such as the G20, BRICS and the Quad, and in a diversified network of bilateral relations: the United States and France have gained increasing influence in defence, technology and security; Russia remains a key partner in energy and military matters; Japan plays a central role in economic cooperation and the Indo-Pacific architecture; and the United Arab Emirates has established itself as a key partner in trade, investment and energy. Added to this is the complex relationship with China, characterised simultaneously by deep economic interdependence and intense strategic and regional competition. Together with its growing engagement with the European Union and other actors, this diversification demonstrates India's desire to expand its room for manoeuvre, strengthen its influence and contribute to a more multipolar international system. India also seeks to position itself as a bridge between advanced economies and the Global South, promoting greater representation of emerging countries in global governance institutions.

This transformation coincides with a period of profound realignment in the global balance of power. The war between Russia and Ukraine, the conflicts and tensions in the Middle East — including geostrategic areas such as the Strait of Hormuz —, the rivalry between the United States and China, the growing use of economic and technological instruments for geopolitical ends, and the fragmentation of global supply chains are disrupting the traditional relationships between foreign policy, trade and security. In this context, India's ability to maintain channels of cooperation with different powers, preserve its strategic autonomy and simultaneously participate in various multilateral mechanisms enhances its relevance as a balancing power and strategic partner in an increasingly fragmented international landscape.

At the same time, technological transformation is introducing a new dimension to the international distribution of power. Artificial intelligence, semiconductors, quantum technologies, cyber security, digital infrastructure, space, advanced telecommunications and other emerging and disruptive technologies are no longer exclusively economic domains; they have become determining factors in security, strategic autonomy and international influence. India aspires to play an increasingly significant role in these sectors, drawing on its digital ecosystem, its skilled workforce, its technology industry and its capacity for innovation. Bengaluru is the most visible example of this trajectory: rather than being merely an analogue

of Silicon Valley or Beijing, it represents the consolidation of a technology ecosystem with its own capacity for innovation, internationalisation and attracting investment.

According to the OECD, Bengaluru has established itself as one of India's leading technology and innovation centres. The organisation identifies the city as the country's longest-standing start-up hub and highlights its role as the epicentre of the development of India's information technology industry since the 1980s. Furthermore, the OECD ranks New Delhi, Bengaluru and Mumbai amongst Asia's leading start-up hubs and notes that, collectively, these three cities account for approximately half of India's start-ups (OECD, 2025b).

It is precisely in this context that the relationship between the European Union (EU) and India takes on a renewed geopolitical dimension. The conclusion of negotiations on the EU–India Free Trade Agreement in January 2026 represents a significant step forward, but the potential of the bilateral relationship should not be assessed solely on the basis of its future economic, trade and financial benefits. Trade can form the economic basis for a much broader partnership, capable of fostering cooperation in technology, research and innovation, security and defence, cybersecurity, connectivity, the energy transition, critical infrastructure and strategic supply chains.

This cooperation is of particular importance to the European Union. In an international order in which the major powers are increasingly linking technological capability, economic security and geopolitical power, the EU faces the challenge of preserving its strategic autonomy whilst, at the same time, strengthening its ability to influence the decisions that will determine the future rules of global technological governance, led by the so-called 'Big Tech' companies, which are primarily American and Chinese (Torres Jarrín, 2025a). It is not merely a question of maintaining balanced economic relations with the United States, China or other powers, but of ensuring that the EU plays an active role in defining the standards, technologies, institutions and governance mechanisms that will shape the future global technological order (Torres Jarrín, 2026a).

In this regard, a deeper strategic partnership with India can broaden the European Union's international room for manoeuvre, diversify its economic and technological relations, and strengthen its presence in the Indo-Pacific and in key global governance forums. For India, meanwhile, a closer relationship with the EU offers access to one of the world's largest markets, advanced scientific and technological capabilities, investment, industrial cooperation and a partner that also seeks to preserve greater levels of autonomy in a landscape characterised by competition between major powers.

The challenge for both sides is, therefore, to transform a relationship that has historically been centred on trade into a strategic partnership with a global reach. The question is no longer simply how much trade the European Union and India can conduct, but what capabilities they can develop jointly, what strategic interests they can defend, and what role they can play in shaping a more multipolar, technologically competitive and geopolitically fragmented international order. From this perspective, deepening the EU–India relationship represents not only an economic opportunity, but also a strategic decision regarding the future positioning of both actors in global technological governance.

2. A new chapter in EU–India trade relations

The conclusion of negotiations on the Free Trade Agreement (FTA) between the European Union and India, announced on 27 January 2026, marks a turning point in an economic relationship that had until then developed without a comprehensive preferential trade framework. The negotiations, which originally began in 2007 and were relaunched in 2022, culminated in an agreement designed to link a market of

approximately two billion people and accounting for nearly a quarter of global GDP. It is important, however, to distinguish between the political conclusion of the negotiations and their effective implementation: the published texts remain subject to legal review, and the agreement must be signed and undergo the necessary internal procedures before it can enter into force (European Commission, 2026a). The scale of the pre-existing economic relationship explains the significance of the agreement. In 2024, bilateral trade in goods reached approximately €120 billion, with €71 billion in Indian exports to the EU and around €49 billion in European exports to India. Similarly, trade in services had reached €59.7 billion in 2023. The EU accounted for around 11.5 per cent of India's total trade in goods, whilst India still accounted for only 2.4 per cent of the EU's external trade in goods. This asymmetry reveals both the importance that Europe already holds for New Delhi and the considerable scope for growth that India offers European companies (European Commission, 2026a).

Data from the World Trade Organisation (WTO) supports this interpretation. In 2024, the European Union accounted for approximately 17.8 per cent of India's exports of goods and established itself as one of its key export markets, whilst around 8.4 per cent of India's imports came from the EU. At the same time, India maintains a relatively high tariff structure: the average MFN tariff applied stood at 15.8 per cent in 2025. The reduction of these barriers substantially alters the conditions of access for European companies to the Indian market (World Trade Organisation [WTO], 2026).

2.1 From non-preferential trade to a platform for economic integration

Prior to the FTA, European companies exporting to India generally had to operate under the standard tariff conditions applicable to WTO members, whilst also facing customs procedures, technical requirements and regulatory differences that increased the costs of market access. The new framework aims to transform this relationship through a combination of tariff liberalisation, customs simplification, greater regulatory predictability, the opening up of services, intellectual property protection, specific provisions for SMEs, and commitments on trade and sustainable development.

The European Commission estimates that India will eliminate or reduce tariffs on 96.6 per cent of European exports of goods. This liberalisation could generate savings of up to 4,000 million euros a year in customs duties for European exporters and, according to the Commission's estimates, help to double EU exports of goods to India by 2032 (European Commission, 2026c).

Table 1. Comparative Assessment of the EU–India FTA and Its Strategic Impact

Scope	Before the FTA	With the implementation of the FTA	Strategic impact
Goods	High tariffs in numerous industrial sectors	Elimination or reduction of tariffs on 96.6 per cent of EU exports of goods	Reduces entry costs and facilitates market diversification
Services	Access subject to national restrictions and reduced certainty	Stronger commitments, particularly in financial and maritime services	Facilitates higher value-added activities and new investment
Customs	Administrative procedures and costs that may hinder trade	Simplification and greater transparency of procedures	Reduces transaction costs and time-to-market

Scope	Before the FTA	With the implementation of the FTA	Strategic impact
SMEs	Greater difficulty in absorbing regulatory and administrative costs	A specific chapter on small and medium-sized enterprises	Extends the potential beneficiaries beyond multinationals
Intellectual property	Differences in protection and enforcement across jurisdictions	Strengthened protection for trade marks, designs, trade secrets and undisclosed information	Improves the environment for innovation, licensing and technological cooperation
Regulation	Greater uncertainty for international operators	Commitments to transparency and good regulatory practices	Favours long-term business decisions and investment
Sustainability	Cooperation, primarily political and sector-specific	Specific framework on climate, labour rights, women's empowerment and civil society	Links trade integration with environmental and social objectives

Source: compiled by the author based on European Commission (2026a, 2026c) and Business Sweden (2026).

2.2 Why is this strategic for India?

For India, broader and more predictable access to the European market offers advantages that go beyond export growth. The EU is a market with high purchasing power, featuring advanced industrial chains, technological capacity and a high volume of investment. Deepening its relationship with Europe enables New Delhi to diversify its markets and supply chains, reduce vulnerabilities arising from an excessive geographical concentration of its economic relations, and advance its integration into global value chains with higher added value.

The structure of Indian exports also presents an opportunity to move from a relationship based predominantly on the exchange of goods towards deeper integration into global value chains. The OECD emphasises that any analysis of Indian trade must take into account not only gross exports, but also the growing contribution of services and domestic value added to manufacturing and international production chains (OECD, 2026). The digitalisation of trade can further deepen this integration: according to the OECD, the digitalisation of documents, procedures and services reduces costs and, in particular, facilitates the international participation of small and medium-sized enterprises (OECD, 2025a).

The agreement may prove particularly significant for sectors in which India has significant export and competitive capabilities. The European Commission identifies pharmaceuticals, chemicals, textiles, footwear and fisheries products as Indian sectors that stand to benefit particularly from trade liberalisation. Added to these is India's strength in technology, IT and business services, which provides a solid foundation for partnerships focused on digitalisation and the cross-border provision of services (European Commission, 2026b; OECD, 2026).

For India, therefore, the FTA can serve a dual purpose: to expand trade access to the EU and to attract European capital, technology and industrial capabilities that will help modernise India's productive structure. In this regard, trade policy forms part of a broader strategy of economic autonomy and

diversification. The Indian Ministry of External Affairs frames the economic relationship within the new India–EU Comprehensive Strategic Agenda Towards 2030, adopted at the bilateral summit on 27 January 2026, with the aim of expanding and coordinating cooperation between the two parties (Ministry of External Affairs, Government of India, 2026).

One aspect of particular relevance from an Indian perspective is trade in services and the mobility of talent. India's Ministry of Commerce and Industry presents the FTA as a framework that enhances predictability for the cross-border provision of services and for the temporary entry of professionals. The agreement includes commitments regarding business visitors, intra-corporate transferees, contractual service suppliers and independent professionals, as well as a framework to promote student mobility, post-study opportunities and dialogue on social security agreements. This dimension is strategic for India because it links one of its key comparative advantages — skilled human capital and knowledge-intensive services — with European demand for digital skills, engineering, research and professional services (Ministry of Commerce and Industry, Government of India, 2026).

This approach allows us to broaden our understanding of the FTA beyond the manufacturing sector. For New Delhi, the relationship with the EU can also serve as a means of internationalising service companies, facilitating the movement of professionals and strengthening links between universities, research centres, start-ups and corporations. For Europe, better-managed mobility can help address talent shortages in technological and scientific sectors, provided that progress is made in parallel on the recognition of qualifications, social protection and circular mobility mechanisms.

2.3 What does the European Union stand to gain?

For the EU, India offers a particularly attractive combination of scale, growth and diversification. With a population of around 1,450 million and an economy worth approximately 3.4 trillion euros, India represents a market whose importance to the EU remains well below its potential. Whilst the EU already plays a central role in India's foreign trade, India accounted for only 2.4 per cent of European trade in goods in 2024. The FTA therefore offers an opportunity to bridge the gap between India's economic weight and its still limited share of European foreign trade.

The potential benefits are particularly significant for European industry. In the electrical machinery and equipment sector, where European exports to India totalled 16.3 billion euros in 2024, tariffs can reach 44 per cent and will be phased out for almost all products. Significant reductions are also envisaged for aeronautics, chemicals, medical and optical equipment, plastics, the automotive sector, steel and pharmaceuticals. In the automotive sector, for example, Indian tariffs can currently reach 110 per cent, whilst the agreement provides for a reduction to 10 per cent within a specific quota (European Commission, 2026c).

Market access is not limited to goods. India's commitments in financial services and maritime transport, together with new provisions relating to dredging and submarine cable-laying services, offer European companies opportunities to participate in sectors closely linked to the infrastructure and connectivity of a growing economy. The Commission considers that the level of market access committed to by India in the services sector exceeds that granted in some of its other recent trade agreements (European Commission, 2026c).

2.4 Priority sectors for EU–India business partnerships

The agreement's greatest potential may lie not only in increasing the volume of goods traded, but also in fostering business partnerships, joint investment, knowledge transfer and integrated production chains. Five particularly promising areas stand out:

- **Digital technologies, software and artificial intelligence.** India brings a vast pool of technological talent and expertise in IT and digital services, whilst Europe has industrial companies, specialist knowledge, research capacity and a demand for digitalisation solutions. Partnerships could focus on applied AI, cybersecurity, enterprise software, Industry 4.0 and digital services.
- **Advanced industry, machinery and automation.** A reduction in India's high tariffs on machinery and electrical equipment could benefit both European exports and joint production. European companies can contribute automation, advanced engineering and industrial technologies, whilst India provides production scale, engineering capabilities and a growing manufacturing market.
- **Pharmaceuticals, biotechnology and health technologies.** India has strong capabilities in pharmaceutical production, whilst Europe retains advantages in biomedical research, medical equipment, innovation and the development of therapies. Deeper cooperation could cover manufacturing, research, clinical trials, pharmaceutical supply chains and health technologies.
- **Energy transition and sustainable industry.** The combination of India's infrastructure and decarbonisation needs and Europe's capabilities in engineering, energy efficiency and clean technologies opens up opportunities for joint projects, sustainable industrial production and the modernisation of supply chains. The chapter on trade and sustainable development also provides an institutional framework for deepening this cooperation.
- **Transport, logistics and maritime infrastructure.** Commitments regarding maritime services and the laying of submarine cables may foster partnerships in logistics, ports, maritime connectivity and digital infrastructure – sectors that are strategic both for European economic autonomy and for India's integration into the international community.
- **Aerospace, space and Earth observation.** Space cooperation is another area with strategic potential. India has built up its own capabilities in launch vehicles, navigation, Earth observation and satellite applications, whilst the EU has assets such as Copernicus and Galileo, as well as an advanced industrial and scientific base. In 2025–2026, ISRO–ESA cooperation was strengthened and the first India–EU space dialogue took place, with opportunities in Earth observation, navigation, secure communications, space sustainability and industrial collaboration. The combination of public and private capabilities can pave the way for joint R&D projects, knowledge transfer and applications in the fields of climate, agriculture, disaster management and connectivity (Indian Space Research Organisation, 2026).

2.5 More than a tariff agreement: a diversification strategy

The potential impact of the FTA must also be analysed in geo-economic terms. A study by the Kiel Institute for the World Economy estimates that the agreement could increase bilateral trade by between 41 per cent and 65 per cent and generate gains of approximately 0.12–0.13 per cent of GDP for both parties. Their simulations also suggest a shift of between 5 per cent and 9 per cent of trade currently linked to China, which would make the agreement a tool for diversifying supply chains for both Europe and India (Hinz et al., 2026).

It is in this regard that one of its most significant political implications probably lies. The agreement enables the EU to diversify its economic exposure towards one of the major emerging economies and offers India

a vast alternative market against a backdrop of growing trade fragmentation. The European Policy Centre interprets this rapprochement precisely as part of a shared quest for greater resilience in the face of excessive dependence on the United States and China (Singh, 2026).

However, these benefits are not automatic. Rules of origin, administrative procedures, companies' ability to utilise tariff preferences, regulatory differences and European climate policies may limit some of the agreement's potential. The Carbon Border Adjustment Mechanism (CBAM), for example, will continue to affect certain carbon-intensive exports from India. Furthermore, negotiations on investment protection and geographical indications are continuing separately, meaning that the FTA does not yet constitute a comprehensive framework for all aspects of the economic relationship (European Commission, 2026a; Dieter, 2026).

From an Indian perspective, some of these frictions may take on a political dimension. The European Carbon Border Adjustment Mechanism (CBAM) is one example: although it is designed to meet the EU's climate targets, it may be perceived by Indian export sectors as an additional barrier to carbon-intensive products. Managing this tension will require technical cooperation on emissions measurement, industrial decarbonisation, financing and the recognition of methodologies, so that the climate agenda does not end up eroding some of the trade benefits of the FTA. India also tends to view the Carbon Border Adjustment Mechanism (CBAM) as an expression of the European Union's normative power, as it extends EU regulatory and environmental standards beyond its borders through the leverage of the Single Market.

Indian policymakers have argued that such measures may pressure developing countries to align with EU carbon standards despite differences in development, historical emissions and responsibilities for addressing climate change. From this perspective, CBAM has raised concerns in India regarding its consistency with the principle of Common but Differentiated Responsibilities and Respective Capabilities (CBDR-RC), a key principle of the international climate regime. Critics in India argue that comparable carbon-related costs on imports may insufficiently reflect structural asymmetries between advanced and developing economies. Consequently, CBAM is often interpreted in Indian policy debates not only as an environmental instrument to prevent carbon leakage, but also as an expression of the EU's broader normative and regulatory influence, whereby access to the Single Market is increasingly linked to compliance with European climate and regulatory standards.

It is also important to define the scope of the agreement precisely. The FTA includes chapters on digital trade, good regulatory practices and the temporary entry of persons, but it does not replace an investment protection agreement nor does it, on its own, resolve regulatory differences, compliance costs or sectoral barriers that may affect investment. In fact, negotiations on investment protection and geographical indications are continuing separately. The challenge will therefore be to build regulatory interoperability and legal certainty without assuming that greater trade integration requires complete regulatory convergence (European Commission, 2026a, 2026b).

Consequently, the true strategic value of the agreement will depend on its implementation and its ability to foster new productive relationships, not merely on the reduction of tariffs. If accompanied by regulatory cooperation, investment, the mobility of talent, the digitalisation of trade and business partnerships, the FTA can transform a relationship based primarily on trade into a platform for economic, technological and industrial integration. Its coordination with the EU–India Strategic Agenda towards 2030 and with technological cooperation mechanisms could enable trade, innovation, economic security and sustainable transition to advance as complementary dimensions of a long-term partnership.

3. EU–India relations: more than just trade – a strategic foreign policy initiative and a geopolitical vision

The deepening of relations between the European Union and India must be understood in a broader context than simply the growth in trade and the conclusion of negotiations on the Free Trade Agreement. It forms part of a wider transformation of the international system, characterised by increasing multipolarity, strategic competition between the United States and China, the fragmentation of global value chains, and ever-greater interdependence between the economy, security and technology. Against this backdrop, the EU–India relationship takes on a geopolitical dimension of its own: both sides have incentives to diversify their partnerships, reduce strategic dependencies and expand their capacity for action within an international system subject to growing tensions.

This interpretation is in line with the approach adopted by the European Union itself. The New EU–India Strategic Agenda, presented in September 2025, regards India’s rise as a global power as an opportunity to deepen strategic cooperation and sets out a broader, more coordinated and multidimensional relationship, aimed simultaneously at prosperity, security and addressing major international challenges (European Commission & High Representative of the Union for Foreign Affairs and Security Policy, 2025).

The EU–India Summit on 27 January 2026 confirmed this development. In addition to concluding negotiations on the Free Trade Agreement, both sides signed a Security and Defence Partnership and adopted a joint strategic agenda for 2030. The Council of the European Union presented the EU and India as potential anchors of stability in an increasingly fragmented and multipolar international landscape, explicitly linking trade, security, defence, energy, connectivity and mobility within a single strategic partnership (Council of the European Union, 2026).

3.1 The EU–India relationship in the face of the shifting international balance

India’s significance within this transformation is not an entirely new phenomenon. Argumosa Pila had already analysed the evolution towards a new world order in which the international distribution of power was undergoing significant changes. His reflections on the emergence of new centres of power are particularly relevant for interpreting India’s current rise and the gradual transition from predominantly Western structures towards a more plural and complex international system (Argumosa Pila, 2009).

This transformation has intensified over the last decade. Aznar Fernández-Montesinos characterises the contemporary landscape as a situation of ‘unbalanced multipolarity’, resulting, amongst other factors, from globalisation and the economic and political rise of new actors. His analysis attaches particular importance to India: he highlights its demographic, economic, territorial, cultural and political weight and points to its capacity to compete strategically with China. He also observes that New Delhi pursues a policy characterised by strategic autonomy and by shifting alignments depending on the issues at hand, thereby avoiding becoming fully integrated into a single geopolitical bloc (Aznar Fernández-Montesinos, 2025).

Another important factor shaping India’s strategic calculations is the changing role of Russia as a potential balancer in Asia. Historically, the Soviet Union and later Russia have been important strategic partners for India, particularly in defence and security cooperation. However, the war in Ukraine and Moscow’s deepening strategic and economic relationship with Beijing have raised concerns in New Delhi about Russia’s long-term capacity to maintain strategic autonomy in Asia. While Russia remains an important partner for India, these developments have encouraged New Delhi to further diversify its strategic partnerships and defence relationships. From this perspective, a strategic partnership between the EU and India can help to create greater balance within the international system, although it should not be interpreted as the creation of a bloc specifically designed to challenge the United States or China. Both

Brussels and New Delhi maintain vital relations with Washington and Beijing. The convergence between the EU and India lies, rather, in the possibility of developing greater strategic autonomy through the diversification of economic, technological and security relations.

The geopolitical value of this cooperation lies precisely in broadening the options available to both sides. For the EU, India represents a partner capable of contributing to Europe's economic, technological and geopolitical diversification in Asia. For India, the EU constitutes a market, a source of investment and technology and, at the same time, an international partner that does not require integration into rigid alliance structures. In this way, the relationship can help to limit excessive bipolarisation of the international system centred on Washington and Beijing.

3.2 The Indo-Pacific as a priority area for cooperation

The Indo-Pacific constitutes the main geographical arena in which this convergence takes on a tangible strategic dimension. European prosperity depends to a large extent on open and secure maritime routes connecting Europe with Asia via the Indian Ocean. India, by virtue of its geographical position, territorial size, naval capabilities and centrality in the ocean that bears its name, occupies a unique position within this architecture. Consequently, the Indo-Pacific region should be viewed not merely as a political concept but as a geopolitical reality (Torres Jarrín, 2021).

Aznar Fernández-Montesinos (2025) highlights precisely the geopolitical importance of India in the face of China's expanding influence in the Indian Ocean and points out that New Delhi perceives China's growing presence, both on land and at sea, as a strategic challenge. At the same time, India seeks to preserve its strategic autonomy by avoiding a complete alignment with the West against China.

This position opens up significant scope for cooperation with Europe. The EU–India Security and Defence Partnership, signed in January 2026, expressly provides for cooperation on maritime security, defence industry and technology, cyber and hybrid threats, the protection of critical infrastructure, space, artificial intelligence and emerging disruptive technologies.

An EU–India strategic agenda in the Indo-Pacific could therefore focus on the protection of maritime trade routes, the security of critical infrastructure, submarine cables and ports, maritime domain awareness, the fight against piracy, maritime cybersecurity and the resilience of global supply chains. This would not merely involve increasing Europe's presence in the Indo-Pacific, but developing capabilities jointly with one of the region's key players.

The Council of the European Union has recognised that the security and prosperity of Europe and the Indo-Pacific are interlinked. This premise transforms the relationship with India: New Delhi is no longer viewed solely as an Asian trading partner but also as a potential partner for regional and global security and stability (Council of the European Union, 2026).

3.3 Strategic connectivity: IMEC, Global Gateway and digital corridors

The connectivity dimension should play a more central role in EU–India relations. The India–Middle East–Europe Economic Corridor (IMEC) provides a framework for connecting India with Europe via the Gulf through transport, energy and digital connectivity infrastructure. For India, this is not merely a vital infrastructure project, but a geopolitical tool to strengthen its access to the European market while reducing the dependency on traditional maritime routes. IMEC also aligns with India's broader objective of positioning itself as a leading logistics and economic hub connecting the Indo-Pacific and Europe.

For the EU, the corridor aligns with the Global Gateway initiative; for India, it complements its strategy for logistical diversification and market access. Its significance lies not only in reducing transport times or costs, but also in creating an alternative and resilient physical and digital architecture linking Asia, the Middle East and Europe. However, the ongoing conflict involving the United States, Israel and Iran complicates this ambitious project. Regional conflict increases risk, generates volatility and uncertainty for investors, and may disrupt political cooperation. Consequently, further escalation involving Iran and the wider West Asian region could pose a strategic challenge to both India and the EU, particularly as this initiative emerges as a promising pillar of EU-India strategic cooperation.

This agenda already includes specific projects. The EU identifies the EU–Africa–India Digital Corridor and Global Gateway investments in India as components of more secure and diversified connectivity. The development of undersea cables, energy corridors, ports and rail links can turn connectivity into a bridge between trade, economic security and strategic autonomy. However, the potential of IMEC will depend on geopolitical stability in the Middle East, coordination across multiple jurisdictions, funding and the ability to transform political commitments into interoperable and operational infrastructure (European External Action Service, 2026).

3.4 The Arctic and the strategic routes of the future

In the longer term, cooperation could also extend to the Arctic, although this aspect must be approached with caution. Climate change may gradually alter navigation conditions and increase the economic and geopolitical importance of the northern routes. However, their development will depend on climatic, technological, economic, legal and security factors; it is therefore not yet appropriate to present them as an immediate alternative to the main Eurasian maritime routes (Torres Jarrín, Argumosa Pila, Daza Aramayo, 2026b).

For the EU and India, however, there is scope to deepen dialogue in areas such as polar research, climate change, sustainable shipping, Eurasian connectivity, Earth observation and logistical resilience. India participates in the Arctic Council as an observer state, whilst the EU maintains a specific policy for the Arctic. The strategic importance of this region for EU–India relations should therefore be understood as a forward-looking dimension of broader cooperation on connectivity and the transformation of global trade routes (Arctic Council, n.d.).

3.5 Disruptive technologies and a new global technological order

Technology is the second major area in which EU–India relations can go beyond trade. Artificial intelligence, semiconductors, quantum computing, space technologies, cybersecurity, telecommunications, digital infrastructure and critical minerals are reshaping the nature of international power. The ability to develop these technologies, ensure their supply and establish the rules governing their use has become a central element of strategic autonomy.

The technological rivalry between the United States and China has shown that control over critical technologies can be used as an economic and geopolitical tool. For the EU and India, this situation creates incentives to develop their own capabilities, diversify supply chains and play an active role in shaping the rules that will structure the future global technological order.

This issue was addressed during India's G20 presidency in 2023. In a policy brief by Think20 (T20) India, Garofali Acosta, Riordan and Torres Jarrín (2023) analysed the environmental and ethical challenges associated with the development of artificial intelligence. The authors emphasise that AI is not merely a digital technology: its expansion increases demand for energy, rare earths and other material resources,

whilst the extraction and processing of these resources can have disproportionate environmental impacts in the Global South. They therefore propose the development of internationally accepted environmental and ethical standards, as well as mechanisms to ensure a more equitable distribution of the costs and benefits of technological transformation.

This perspective is particularly relevant to an EU–India partnership. Europe possesses significant regulatory, scientific, industrial and technological capabilities, whilst India brings scale, specialised talent, software capabilities, digital infrastructure and a growing technology ecosystem. Cooperation could focus on the joint development of responsible AI, sustainable digital technologies, semiconductors, advanced computing, data protection, digital infrastructure and supply chains for critical minerals.

One area that deserves specific attention is digital public infrastructure. India has developed a Digital Public Infrastructure (DPI) model based on large-scale, interoperable platforms, whilst the EU has built up particularly strong regulatory capacity in the areas of data protection, digital markets and artificial intelligence. The potential for complementarity is significant: India brings expertise in large-scale roll-out and public digital services; Europe, regulatory capacity, standards and mechanisms for the protection of rights.

The Trade and Technology Council has already identified the interoperability of public digital infrastructure, trustworthy AI, semiconductors, high-performance computing, quantum technologies and 6G as areas of focus. In July 2026, at its third meeting, it agreed, amongst other initiatives, to begin formal negotiations on India's association with Horizon Europe, to establish a first EU–India Innovation Hub on electric vehicle charging technologies, and to launch a Start-up Partnership focused on deep tech and clean technologies. These developments show that the technological relationship is beginning to shift from political dialogue towards concrete instruments for research, innovation and the market (European Commission, 2026d).

This cooperation does not, however, eliminate regulatory differences. The EU operates under a data protection and digital regulation framework that differs from the Indian model, the implementation of which has been strengthened by the Digital Personal Data Protection Rules of 2025. Therefore, the realistic objective should not be complete harmonisation, but rather to develop mechanisms for interoperability, trust, certification and data transfer that enable cooperation without eroding the respective regulatory models (Ministry of Electronics and Information Technology, Government of India, 2026).

The objective, however, should not be limited to producing and marketing technology. The truly strategic dimension lies in jointly participating in the definition of the international standards governing its development and use.

3.6 Cybersecurity, private companies and technology governance

Cybersecurity represents a second key component of this agenda. In another policy brief presented at the T20 India 2023, Riordan, Torres Jarrín and Garofali Acosta (2023) warn that some private cybersecurity firms have developed capabilities that surpass those available to many governments. The authors argue that a potential shift from defensive functions towards offensive cyber capabilities could pose risks to the stability of the internet, international peace, human rights and the rule of law.

In light of these risks, they propose that the G20 establish a commission dedicated to analysing the current and future activities of private cybersecurity firms, assessing the need for regulation, and strengthening government capabilities, particularly in developing countries. The aim would be to move towards a

Cybersecurity Action Plan that promotes responsible business practices and appropriate accountability mechanisms (Riordan et al., 2023).

This proposal provides a particularly useful conceptual framework for EU–India cooperation. A bilateral agenda on cybersecurity could incorporate the protection of critical infrastructure, the security of submarine cables and digital networks, the exchange of information on threats, standards for private cybersecurity providers, specialised training, digital resilience and cooperation in the face of hybrid threats. Indeed, the security and defence partnership signed in 2026 already includes cybersecurity, artificial intelligence and emerging disruptive technologies, the protection of critical infrastructure and resilience amongst its areas of cooperation, demonstrating that these issues have moved from academic debate to becoming part of the bilateral strategic agenda.

3.7 From strategic autonomy to global governance

The combination of these dimensions allows us to identify a fundamental characteristic of the EU–India relationship: its value does not depend on the forging of a traditional alliance, but rather on the ability of both parties to cooperate whilst maintaining their respective degrees of autonomy.

India participates simultaneously in the G20, BRICS and the Quad, maintains a strategic partnership with the United States and retains significant relations with Russia, whilst managing a complex relationship of cooperation and competition with China. This flexibility reflects a concept of strategic autonomy which Aznar Fernández-Montesinos (2025) identifies as a central feature of Indian foreign policy.

The European Union, whilst following a different path, pursues objectives that are partly aligned: reducing critical dependencies, diversifying supply chains, protecting strategic infrastructure, achieving technological autonomy, and building the capacity to act internationally against a backdrop of growing competition between major powers. Consequently, the EU and India may find a common ground precisely in strategic autonomy. Their cooperation does not require identical positions on all international conflicts, but rather the identification of areas where their structural interests coincide.

Taken together, these three dimensions — multipolarity, strategic autonomy and technological governance — provide a framework for understanding why the EU–India relationship may take on considerable significance in the coming decades. The aim should not be to form a third geopolitical bloc in opposition to the United States and China, but rather to enhance the EU’s and India’s capacity to preserve spaces for cooperation, autonomy and multilateralism within a system subject to growing competition between major powers. A closer relationship can help to diversify supply chains, protect maritime routes, strengthen security in the Indo-Pacific, develop critical technologies and establish shared principles for global technology governance.

From this perspective, the Free Trade Agreement is merely one of the pillars of a much broader strategic framework. Trade and investment must be linked to maritime security, connectivity, defence, cyber security, disruptive technologies, sustainability and global governance. The Strategic Agenda towards 2030 and the new security and defence partnership already provide an institutional framework for moving in this direction.

If this cooperation can be consolidated, the EU–India partnership could become not only a mechanism for economic prosperity, but also a stabilising force within a more multipolar international system, particularly in the Indo-Pacific, and a platform from which both sides can help shape the norms, standards and institutions of the emerging global technological order.

4. Conclusions and policy recommendations

The conclusion of the Free Trade Agreement negotiations marks a new phase in relations between the European Union and India. Its significance goes beyond tariff reductions and improved market access. The agreement can serve as a platform for increasing productive investment, integrating value chains, boosting technological cooperation and fostering business partnerships in strategic sectors. Its scope will ultimately depend on the ability of both parties to turn the negotiated commitments into concrete opportunities for businesses, investors and innovation hubs.

This opportunity takes on an additional dimension in an international landscape characterised by geo-economic fragmentation, technological competition and uncertainty regarding the evolving balance of power amongst the major powers. A closer EU–India relationship should not be viewed as the formation of a new bloc in opposition to the United States or China, but rather as a means of diversifying dependencies, expanding the scope for strategic autonomy and strengthening both parties' capacity to influence a more multipolar international system.

The immediate challenge is, therefore, to move from the agreement to its implementation. A legally ambitious FTA will have limited impact if businesses — particularly SMEs — find it difficult to make use of their trade preferences, understand the rules of origin or overcome administrative and technical barriers. Trade liberalisation must be accompanied by an active policy to support internationalisation, investment and business cooperation.

4.1 Ten policy recommendations

1. **Ensure the effective implementation of the FTA.** Establish a permanent EU–India monitoring mechanism to identify and resolve obstacles relating to customs, rules of origin, certifications and technical standards, regularly involving the private sector, chambers of commerce and business associations.
2. **Facilitate the internationalisation of SMEs.** Create one-stop shops, digital tools and advisory services that reduce the costs of entering both markets. National trade and investment promotion agencies should strengthen business missions, partner identification and specific support programmes for SMEs.
3. **Convert trade growth into productive investment.** Promote direct investment, *joint ventures*, shared production and joint research and development centres. A predictable framework for investment protection and improved financing instruments would help to mobilise capital towards long-term projects.
4. **Develop value chains in strategic sectors.** Focus efforts on areas where there are clear synergies: semiconductors, artificial intelligence and software, pharmaceuticals and biotechnology, health technologies, renewable energy and hydrogen, advanced machinery, the automotive sector and electric mobility, space, telecommunications, cybersecurity, critical raw materials, infrastructure, logistics and the maritime economy. The priority should be to move from a relationship based on buying and selling towards investment, innovation and joint production.
5. **Strengthen the EU–India Trade and Technology Council (TTC).** Use it as a bridge between trade policy, industrial policy and technological cooperation, with specific projects in semiconductors, AI, telecommunications, digital infrastructure, green technologies and critical supply chains. It should also serve to anticipate technological dependencies and vulnerabilities. The agreements reached at the third ministerial meeting in July 2026 provide an immediate basis for translating this recommendation into measurable projects with a clear implementation timetable.

6. **Develop a joint agenda for talent, research and innovation.** Expand cooperation between universities, technology centres, start-ups and businesses, as well as the mobility of researchers and qualified professionals. The link between European and Indian innovation ecosystems should prioritise AI, biotechnology, clean technologies, space, cybersecurity and quantum technologies. The development of mechanisms for the mutual recognition of qualifications, circular mobility and coordination on social security should form part of this agenda.
7. **Link trade and economic security.** Strengthen cooperation in the Indo-Pacific to protect maritime routes, ports, submarine cables and critical infrastructure, as well as improving logistical resilience and cooperation in the face of cyber threats. The security of the corridors linking Europe and Asia is a shared economic and strategic interest. In this context, IMEC and the Global Gateway projects should be treated as instruments of economic resilience and strategic connectivity, not merely as infrastructure projects.
8. **Coordinate initiatives within the G20, the WTO and other international forums.** Identify common positions on reform of international economic governance, digital trade, development finance, supply chain resilience, sustainability and artificial intelligence. India's capacity to engage with the Global South and Europe's economic, institutional and regulatory clout offer a complementarity that both sides could capitalise on to build thematic coalitions.
9. **Drive forward an EU–India agenda on global technology governance.** Promote international principles and standards on responsible artificial intelligence, cybersecurity, data protection and critical digital infrastructure. This cooperation would enable the EU and India to play an active role in shaping the rules governing emerging technologies, rather than being dictated to solely by the technological competition between the United States and China. The work carried out during India's G20 presidency provides a relevant basis for moving in this direction (Garofali Acosta et al., 2023; Riordan et al., 2023). The interoperability of public digital infrastructure and trust mechanisms for data exchange should be incorporated as operational priorities.
10. **Consolidate a strategic partnership based on autonomy rather than on a policy of blocs.** EU–India cooperation should focus on those areas where there are converging interests — trade, connectivity, maritime security, technology, sustainability and multilateral reform — without requiring identical positions on foreign policy. Its strategic value lies precisely in broadening the options available to both sides, reducing excessive dependencies and contributing to a more balanced international system. Across the board, the EU–India Strategic Agenda towards 2030 should incorporate an evaluation mechanism with verifiable indicators. Monitoring could measure, amongst other things, the effective use of FTA preferences by SMEs, trends in bilateral investment, the number of joint projects promoted by the TTC, the mobility of researchers and professionals, progress on connectivity projects linked to IMEC and the Global Gateway, and the adoption of digital interoperability mechanisms. This layer of evaluation would make it possible to distinguish between political commitments, announced initiatives and results that have actually been implemented.

4.2 Final considerations

The success of the FTA should not be measured solely by the growth of bilateral trade. Its real significance will also depend on its capacity to generate sustainable investment, deepen and diversify value chains, involve SMEs, stimulate technological innovation, strengthen industrial competitiveness, and expand the international presence of European and Indian companies. Achieving these objectives will require both sides to complement trade liberalisation with greater legal certainty, investment and financing instruments, support for internationalisation, and closer coordination between trade, industrial, digital, technology, foreign, and economic security policies.

The international dimension is equally important. The European Union remains one of the world's most influential economic and regulatory actors, with a significant capacity to shape international standards, while India has consolidated its position as a major emerging power, a technological actor of growing importance, and an increasingly influential voice among emerging economies and the Global South. Their cooperation therefore extends far beyond bilateral economic relations. Greater coordination within the G20, the WTO and other multilateral and plurilateral frameworks, as well as in discussions on digital governance, artificial intelligence, critical technologies and global standards, could enable Brussels and New Delhi to contribute to consensus-building at a time of increasing geopolitical fragmentation and institutional competition.

This strategic dimension becomes particularly important in the context of the emerging Global Technological Order. Technological capabilities, access to critical raw materials, semiconductors, artificial intelligence, digital infrastructure, data governance, cybersecurity and control over global technological standards are increasingly becoming central components of national power and international influence. At present, global technological development and governance are shaped to a significant extent by two major technological poles: the United States and China. Against this background, the EU and India have a shared interest in ensuring that the future technological order does not become excessively concentrated, fragmented or structured exclusively around competing geopolitical blocs.

A stronger EU–India partnership could therefore contribute to broadening the centres of influence within global technology governance. Europe brings regulatory capacity, advanced research ecosystems, industrial capabilities and considerable market power, while India contributes demographic scale, a rapidly expanding digital economy, technological talent, digital public infrastructure and growing innovation and manufacturing capacities. These assets are not identical, but complementary. Their combination could give both sides greater strategic room for manoeuvre, reduce excessive dependencies in sensitive sectors and strengthen their capacity to influence the rules, standards and institutions that will govern the technologies of the future.

Such cooperation should not be understood as an attempt to replicate or confront the existing US- and China-centred technological ecosystems. Rather, it could contribute to a more plural and balanced architecture of global technology governance, in which standards, infrastructure, innovation and critical technologies are shaped by a wider range of actors. In this context, the European Union and India could increasingly act not only as rule-takers, but also as rule-shapers and agenda-setters in areas such as artificial intelligence, digital governance, semiconductors, data, cybersecurity, critical technologies and technological standards.

The FTA should therefore be understood not simply as an agreement to facilitate the exchange of goods and services, but as an enabling framework for a much broader strategic partnership. Trade and investment can provide the economic foundations upon which deeper cooperation in critical and emerging technologies, resilient supply chains, research and innovation, digital governance, connectivity and economic security can be built. Such cooperation could strengthen the strategic autonomy of both actors while preserving their capacity to maintain diversified relations with other global powers.

For the European Union, a deeper partnership with India offers an opportunity to strengthen its presence in the Indo-Pacific, diversify its economic and technological partnerships and reinforce its capacity to operate autonomously in an increasingly competitive international environment. For India, stronger relations with the EU can expand access to capital, technology, research networks and one of the world's largest markets, while reinforcing its own strategic autonomy and global influence. For both, the

partnership offers an opportunity to demonstrate that strategic autonomy need not imply isolation or protectionism, but can instead be built through diversified interdependence, trusted partnerships and greater resilience.

Ultimately, the EU–India FTA should be regarded as a starting point rather than an end in itself. Its greatest potential lies in fostering a multidimensional relationship in which trade, investment, technology, innovation, security and foreign policy increasingly reinforce one another. The strategic value of the agreement will therefore depend not only on how much Europe and India trade, but on what kind of partnership they are able to build around that economic relationship. If Brussels and New Delhi succeed in transforming the FTA into the economic foundation of a broader geopolitical and technological partnership, EU–India relations could become one of the important pillars of a reshaping international order. Such a partnership could strengthen prosperity and resilience on both sides, enhance their respective strategic autonomy and contribute to a more balanced distribution of technological influence globally. The long-term significance of the FTA may therefore ultimately lie beyond trade itself: in its capacity to provide the economic foundations for a stronger geopolitical partnership, enable the European Union and India to become increasingly influential actors in global technology governance, and contribute to a more balanced, pluralistic and strategically sustainable Global Technological Order.

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