

SPAIN AND INDIA AS GLOBAL PARTNERS: ENHANCING CAPACITY-BUILDING AND COOPERATION INITIATIVES TO FOSTER STRONGER TIES

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This Concept Paper has been elaborated within the framework of the III Spain-India Forum, titled “Spain and India and Global Partners: Enhancing Capacity-Building and Cooperation Initiatives to Foster Stronger Ties”, scheduled for November 22nd, 2023, at the Instituto Cervantes in New Delhi. The III Spain-India Forum aims to explore the assets and opportunities for Indo-Spanish cooperation as global partners in four key fields: the participation of the European Union and Latin America in the Indo-Pacific; capacity-building in defence industries; university collaboration and educational exchanges; and the global dimension of the Spanish language. This introductory document provides insights of the 2023 presidencies of the G20, Council of the EU and Pacific Alliance; analyses common grounds and interests with India in the participation of the EU and Latin America in the Indo-Pacific; identifies pathways and opportunities for a Stronger Indo-Spanish collaboration; studies synergies and complementarities for capacity-building and cooperation initiatives in the target sectors identified; and finally sizes the role of India and Spain as global partners. This Concept Paper aims to be accessible to all readers, providing informative content about Spain and India as Global Partners in a concise manner, without aiming to be exhaustive.

* The ideas and analysis expressed in this Concept Paper are those of the author exclusively. This Concept Paper does not reflect any opinion or endorsement by the Spain-India Council Foundation.

Introduction: 2023 Presidencies of the Council of the European Union, the G20 and the Pacific Alliance

The Spanish presidency of the Council of the EU

Spain, during its rotating presidency of the Council of the European Union in the second semester of 2023, has chosen to pursue an **open strategic autonomy** centred on the core pillars of reindustrialization, ecological transition, environmental adaptation, social and economic justice, and the strengthening of European unity. Spain's advocacy for multilateralism, a rules-based international order and the 2030 Agenda remains at the core of the foreign vision of its presidency.

In its aim to support the European Union as a key player in the new international order, Spain contributes to **strengthen EU's global connections**. Spain's long-term commitment, institutional architecture and socio-cultural ties with Latin America and the Northern Africa vicinity provide an opportunity to enhance the EU's standing in these regions, with the final goal of institutionalizing the bi-regional relationship. The Spanish presidency has been instrumental to revive the EU-CELAC summit celebrated in July 2023, the previous edition of which occurred in 2015. Furthermore, there is a strong emphasis on advancing the trade agreement with Mercosur, which would expand the EU's network of agreements to encompass countries representing more than 95% of Latin America and the Caribbean (LAC)'s GDP (see Figure 1). The Spanish rotating presidency is also dedicated to ensuring a stable, secure and cooperative environment with the Northern Africa vicinity while enhancing cooperation with a focus on innovation, sustainability and digitalization.

Furthermore, Spain has demonstrated during its presidency its commitment to a **consistent and engaged European position in the Indo-Pacific**, with the aim of increasing EU's cooperation with the region, especially with India, following the EU Strategy for the Indo-Pacific with which Spain fully aligns itself. Notably, the Spanish presidency has begun with the signing of the Free Trade Agreement between the EU and New Zealand.

EU PARTNER	TYPE OF AGREEMENT	YEAR	GDP SHARE (LAC)
CHILE	Association Agreement (expansion under negotiation)	2003	5.17%
CARICOM	Economic Partnership	2008	3.53%

MEXICO	Partnership Agreement (Association Agreement under negotiation)	2010	25,19%
CENTRAL AMERICA	Association Agreement	2013	5.49%
COLOMBIA-PERU- ECUADOR*	Trade Agreement	2013/2017*	12.09%
MERCOSUR	Trade Agreement	Under negotiation	45.78%

Figure 1: Economic Architecture EU-LAC

Sources: 1) Agreements: Access 2 Markets, European Commission 2023. 2) GDP Data: World Economic Outlook database, International Monetary Fund (Gross domestic product, current prices, 2022). October 2023.

The Indian presidency of G20

The India presidency of the G20 has marked a significant milestone in India’s global role, fostering a human-centric inclusive growth. During its presidency of the G20 in 2023, India has not only focused on giving a voice to the Global South but also on being the **voice of the Global South**. To confront the current global challenges, India has also given priority in the G20 agenda to the multilateral reform as well as to the creation of resilience and reliable global supply chains.¹

As a result, India has emerged as a key global actor with the ability to foster multidirectional and minilateral diplomatic engagements, becoming a pragmatic player in strategic balancing in the Indo-Pacific and beyond. **India has indeed drawn global attention to the Indo-Pacific challenges** during its G20 presidency —given that 14 out of the 19 G20 members are territorially represented in the region—. India has also strong historical, political and economic ties with most of the countries in Asia and the Indo-Pacific region, including Central Asia, the Middle East, or Sub-Saharan Africa.

Furthermore, India’s efforts to **expand its footprint in regions beyond its traditional geographic scope** have been remarkable. At the G-20 summit in New Delhi, Indian Prime Minister Narendra Modi unveiled the India-Middle East-Europe Economic Corridor (IMEC), associated with the Partnership for Global Infrastructure Investment (PGII) launched in 2022 by the G-7 countries and co-signed by Germany, France, the EU, among others. The

¹ For a more comprehensive explanation of the aims and values of India’s G20, see the Outcome Paper prepared by the Spanish-India Observatory on the occasion of the II Spain-India Dialogue “Samir Saran’s Visit to Spain: A Reflection on India’s Participation in the Indo-Pacific and the World”. Available at: http://www.spain-india.org/files/documentos/EN-Outcome_Paper-Samir_Saran_Visit_to_Spain.pdf

involvement of Latin America in the G20 has also been pursued by the Indian endeavours, with the Indian Foreign Minister S. Jaishankar making numerous visits to countries in the region over the past four years that were not visited before.

The Peruvian presidency of the Pacific Alliance

Peru assumed the pro tempore presidency of the Pacific Alliance on August 1st, 2023, with a commitment from the bloc's members to deepen regional integration for addressing shared challenges and to **expand relations with countries in the Pacific region**. The Pacific Alliance, which was founded in April 2011 with the goal of promoting greater growth and competitiveness in their economies, has Chile, Colombia, Mexico and Peru as members.

Its **institutional projection has garnered considerable interest** from various countries—with 63 observer states, including 14 from the Americas, 2 from Africa, 13 from Asia, 32 from Europe, and 2 from Oceania, with both Spain and India included among them—. Currently, negotiations are underway for the full membership of Ecuador and Costa Rica—having shown Honduras interest on the same—as well as for Singapore and South Korea to become associated states—that could be followed by Canada, Australia or New Zealand—.

One of the priorities of the Peruvian presidency is **strengthening the Pacific Alliance's presence in the Asia-Pacific region** and promoting the entry into force of the Free Trade Agreement between the Pacific Alliance and Singapore (PASFTA), which has already been ratified by Peru. Additionally, negotiations for trade agreements with the Republic of Korea are set to begin, followed by discussions with Australia, Canada and New Zealand. The PASFTA not only involves the elimination of tariffs, but also includes transparent and non-discriminatory rules for developing technical regulations as well as the removal of requirements for service providers to establish or maintain local representative offices. The PASFTA could mark the first step of the Pacific Alliance towards building an FTA network that could reshape economically the Indo-Pacific region.

1. The Participation of the European Union and Latin America in the Indo-Pacific: Common Grounds and Interests with India

India and the institutional architecture of the Indo-Pacific

The complex and dynamic institutional architecture in the Indo-Pacific is experiencing the emergence of new fora distinct from traditional multilateral organizations. In this landscape, collaboration takes on various forms, including **minilateral and plurilateral**

arrangements.² These institutionalized groups among like-minded countries focus on addressing specific issues such as defence and security cooperation, resilient trade and supply chains, and the twin green and digital transition. India has embraced unilateralism to comprehensively address the present challenges and opportunities in the Indo-Pacific.³ The QUAD stands out as a prominent plurilateral platform within this framework not only to promote peace, stability and prosperity in the Indo-Pacific but to address specific challenges such as cybersecurity or Maritime Domain Awareness.⁴

European countries have also found ways to partner with India either through Ministerial Dialogues, such as France or Italy with Trilateral Dialogues of External Affairs Ministers in the sidelines of multilateral platforms —India, France & Australia; India, France & United Arab Emirates; or India, Japan & Italy, the latter targeting Indo-Pacific stability— or through capacity-building partnerships, for instance within the Indo-Pacific Oceans Initiative — France on marine resources or United Kingdom on maritime security—. **Track 1.5 and Track 2 informal dialogues** —the latter between non-governmental actors, such as think tanks, academics, and civil society, and the former including government officials in the discussions— have gained significance in addressing regional challenges and opportunities. Some of the trilateral ministerial dialogues have their roots in these informal dialogues, providing a testing ground for converging interests before more structured unilateral structures are formed.

India actively fosters track formats from a bilateral perspective within regional associations, aiming to provide valuable insights into strategic collaboration —such as the ASEAN-India Track 1.5 Dialogue on Cyber Issues in its third edition—. This involvement extends to increased **engagement with regional associations in the Indo-Pacific**, particularly establishing strategic partnerships with the Association of Southeast Asian Nations (ASEAN) or a leading role in the Indian Ocean Rim Association (IORA), as well as with global actors such as the EU —Track 1.5 dialogues in climate action or maritime governance, among others—. In the economic realm, India prefers a bilateral approach to multilateral ones as shown by India's decision not to join free-trade agreements —including

² For an introductory study of the Indo-Pacific, see the Concept Paper prepared by the Spain-India Observatory on the occasion of its launch and Professor Raja Mohan's visit to Spain "Spain, India and The Indo-Pacific: Fostering a (Re)Connected Partnership". Available at: http://www.spain-india.org/files/documentos/Concept_Paper-Ingles.pdf

³ For an insight on India's maritime participation in the Indo-Pacific, see the Outcome Paper prepared by the Spanish-India Observatory on the occasion of the II Spain-India Dialogue "Samir Saran's Visit to Spain: A Reflection on India's Participation in the Indo-Pacific and the World". Available at: http://www.spain-india.org/files/documentos/EN-Outcome_Paper-Samir_Saran_Visit_to_Spain.pdf

⁴ For a more extensive explanation on the defence and security architecture in the Indo-Pacific, see the Concept Paper elaborated by the Spain-India Observatory on the occasion of the II Spain-India Dialogue titled: "Maritime Security, Governance, and Connectivity in the Indo-Pacific: The Central Role of India and Opportunities for Bilateral Cooperation". [http://www.spain-india.org/files/documentos/EN-Concept_Paper-Maritime_Indo-Pacific_\(1\).pdf](http://www.spain-india.org/files/documentos/EN-Concept_Paper-Maritime_Indo-Pacific_(1).pdf)

the regional's largest Regional Comprehensive Economic Partnership (RCEP) — or its choice to partly opt out of the trade pillar in regional associations — such as the Indo-Pacific Economic Framework for Prosperity (IPEF) —. Nonetheless, India converges with the EU, LAC and Spain in different fora in the Indo-Pacific region (see Figure 2).

ASSOCIATIONS/INITIATIVES	PARTICIPATION INDIA/EU/LAC/SPAIN	YEAR OF FOUNDATION
ASSOCIATION OF SOUTHEAST ASIAN NATIONS (ASEAN)	Dialogue partners: EU and India	1967
PACIFIC ISLANDS FORUM (PIF)	Dialogue partners: Chile, Cuba, EU, India, and Spain	1971
INDIAN OCEAN COMMISSION (IOC)	Observers: EU and India	1982
WESTERN PACIFIC NAVAL SYMPOSIUM (WPNS)	Members: Chile and Peru Observer: India	1987
ASIA-PACIFIC ECONOMIC COOPERATION (APEC)	Members: Peru, Chile and Mexico Observer: India	1989
ASIA-EUROPE MEETING (ASEM)	Partners: EU, India and Spain	1996
INDIAN OCEAN NAVAL SYMPOSIUM (IONS)	Member: India Observer: Spain	2008
PACIFIC ALLIANCE (PA)	Members: Chile, Colombia and Mexico Observers: India and Spain	2011

Figure 2: Joint participation of India, the EU, LAC and Spain in the institutional architecture of the Indo-Pacific

Sources: ASEAN, PIF, IOC, WPNS, APEC, ASEM, IONS and PA

Towards a new engagement of Latin America in the Indo-Pacific in partnership with India

While most Indo-Pacific strategies have commonly overlooked Latin America, recent ones such as South Korea's have emphasized the need to **strengthen regional multilateral**

cooperation networks with the region, particularly highlighting engagement with the Pacific Alliance. Latin American countries along the Pacific Rim, traditionally less active in Indo-Pacific considerations, have begun recognizing the Indo-Pacific as a significant security and defence environment (Defence Policy of Chile, 2020). Latin American countries have also shown a growing emphasis on the goal of inclusivity in Indo-Pacific strategies by key Pacific actors like Australia and New Zealand (Ministerio de Relaciones Exteriores de Colombia, Plan de Acción 2021-22). The most recent Workshop of the Western Pacific Naval Symposium (WPNS) —that comprises navies from Pacific Rim countries, including Chile and Peru as members and India as observer— was organised by the Peruvian Navy in 2023.

The challenging geopolitical landscape and disruptions in global supply chains have **spurred trade between India and Latin America**. Despite historical and geographical distances, economic complementarities are yielding significant results, with India's exports to Latin America growing by 19% in the 2022-23 compared to the previous fiscal year. Key Indian exports to Latin America include automobiles, pharmaceuticals and petroleum products (Ministry of Commerce and Industry of India, 2023). Notably, India stands as one of the top global suppliers of chemicals to the Latin American region. On the other hand, Latin America serves as a crucial partner for India in the supply of oil, gas, minerals and vegetable oils —meeting India's rising demands in these sectors—. Latin America stands as the primary global supplier of soyabean oil to India. The fostering of free trade agreements—a special round of negotiations was recently held for the India-Peru Trade Agreement—and better connectivity between these two regions are vital, especially concerning port infrastructure and flight routes, where Spain could play a pivotal role as a connecting hub.

China stands as the primary trader and investor in numerous Latin American countries, engaging with 21 out of the 33 states in the Latin America and Caribbean region through the Belt and Road Initiative (Belt and Road Portal, 2023). Since Latin America's pursuit of self-reliance remains a key challenge, India emerges as a potential key partner in this endeavour. **India's investments in Latin America predominantly focus on value-added sectors**, spanning from manufacturing to information technology. Indian companies operating within these strategic sectors are generating employment, stimulating industrial growth in the region and playing a role in mitigating dependence. India's targeted investments in these sectors offer a promising opportunity for Latin America to diversify its economic ties and bolster self-reliance, signalling a potential avenue for sustainable growth and economic development.

The EU's quest for a greater involvement with India in the Indo-Pacific

The European Union recognizes the intrinsic interconnection of geopolitical issues in both the Indo-Pacific and Europe, making the Indo-Pacific one of the most critical and complex regions in terms of implementing the EU's strategic autonomy. Therefore, **2021's EU**

Strategy for Cooperation in the Indo-Pacific acknowledges the strategic significance of the region. Additionally, the Ministerial Forum for Cooperation in the Indo-Pacific —with its inaugural meeting held in Paris in February 2022 and the subsequent session in Stockholm in May 2023— signifies a dedicated commitment to a comprehensive approach. India, playing a central and stabilizing role in the region, and the EU, firmly committed to a rules-based and interconnected Indo-Pacific, are necessary partners.⁵

Connectivity stands as a pivotal component within the EU’s involvement in the Indo-Pacific. The EU places emphasis on creating diversified, sustainable and resilient supply chains within the region, focusing on **cultivating robust trade and digital partnerships**. While the Indo-Pacific and the EU collectively account for 70% of the global trade in goods and services and over 60% of FDI flows (European Commission, 2021), there remains considerable room for enhancing bilateral trade between the EU and India. Despite India representing 7% of global GDP, its trade only constitutes around 2% of the EU’s total trade (see Figure 3). Nonetheless, India and the EU could concur in *friendshoring* and *de-risking* approaches.⁶ Strengthening ties with India becomes imperative for Europe to foster diversification and digitalization in its pursuit of resilient supply chains. India’s ambition to evolve into a technology-centric manufacturing hub for global supply chains, would benefit from the engagement of European technology and its commitment with sustainable and inclusive growth.

Amidst the ongoing transition from *deglobalization*⁷ to *reglobalization*⁸, both **India and the EU emerge as promising alternatives** to each other. While recognizing China’s significance as a key global player, both entities are acutely aware of the challenge China presents. Simultaneously, they seek to forge renewed partnerships with the United States to collectively address shared security concerns without compromising their respective

⁵ For an analysis on the scope and reach of EU Strategy for Cooperation in the Indo-Pacific, see the Concept Paper prepared by the Spanish-India Observatory on the occasion of the I Spain-India Dialogue “Europe, India, and the Indo-Pacific: An Analysis of the European Union’s Strategy for Cooperation in the Indo-Pacific and the Global Gateway Initiative”. Available at: <http://www.spain-india.org/files/documentos/ES-Concept Paper-Europa India y el Indo-Pacifico.pdf>

⁶ For understanding the definition and implications of *friendshoring* and *de-risking*, see the Concept Paper prepared by the Spanish-India Observatory on the occasion of the III Spain-India Dialogue “Towards Resilient Supply Chains in the Indo-Pacific: India as an Alternative for Spanish Companies”. Available at: <http://www.spain-india.org/files/documentos/EN-Concept Paper-Resilient Supply Chains in the Indo-Pacific.pdf>

⁷ For an explanation on *deglobalization* from Prof Raja Mohan’s approach, see the Outcome Paper prepared by the Spanish-India Observatory on the occasion of the presentation of the 2023 Programme “Visit of Professor Raja Mojan to Spain: India’s Vision on the Indo-Pacific”. Available at: <http://www.spain-india.org/files/documentos/Outcome Paper-Ingles.pdf>

⁸ For an explanation on *reglobalization* from Arancha Gonzalez Laya’s approach, see the Outcome Paper prepared by the Spanish-India Observatory on the occasion of the III Spain-India Dialogue “India and Resilient Supply Chains in the Indo-Pacific”. Available at: <http://www.spain-india.org/files/documentos/EN-Outcome Paper-India and Resilient Supply Chains.pdf>

strategic autonomies. The EU envisions exerting a strategic influence in the Indo-Pacific in collaboration with its regional partners, all while upholding its fundamental values and principles. Meanwhile, India actively strives to play a central role within the evolving architecture of the Indo-Pacific. Significantly, the strategic priorities of the EU and India are aligning more closely than ever before, reflecting a convergence in their objectives and perspectives.

INDIA'S LARGEST TRADING PARTNERS (% OF TOTAL TRADE), 2021			EU'S LARGEST TRADING PARTNERS (% OF TOTAL TRADE IN GOODS), 2021		
1	USA	11.6 %	1	CHINA	16.2 %
2	CHINA	11.4 %	2	USA	14.7 %
3	EU	10.8 %	3	UK	10 %
			10	INDIA	2.1 %

EU-INDIA TRADE, 2021		EU-INDIA INVESTMENT, 2020	
TRADE IN GOODS, billion \$	87.9	FOREIGN DIRECT INVESTMENT, billion \$	93.9
INDIAN GOODS EXPORTS TO THE EU, billion \$	46.1	INDIAN FOREIGN INVESTMENT STOCK IN THE EU, billion \$	6.6
EU GOODS EXPORTS TO INDIA, billion \$	41.8	EU FOREIGN INVESTMENT STOCK IN INDIA, billion \$	87.3
TRADE IN SERVICES, billion \$	36.6		
INDIAN SERVICE EXPORTS TO THE EU, billion \$	18.5		
EU SERVICE EXPORTS TO INDIA, billion \$	18.1		

Figure 3: The role of India and the EU in the Global Economy

Source: Ministry of Commerce of India; European Commission

2. Pathways for a Stronger Indo-Spanish Collaboration: Identification of Opportunities from the EU and Bilateral Frameworks

Defence and security partnerships in the Indo-Pacific

Traditionally, India and Europe have not considered each other as strategic security partners. The European Union has often been viewed as a non-geopolitical actor by many Asian countries, including India. However, India's interest in collaborating with Europe in the security of the region, particularly evident in the Indian Ocean, is on the rise. Madrid's hosting of the pivotal 2022 NATO Summit, which notably included the participation of countries from the Indo-Pacific —Australia, Japan, New Zealand and the Republic of Korea—, followed by NATO's 2023 initiative "Futures in the Indo-Pacific", signals a significant drive toward enhanced cooperation in the region. Despite the historical Atlanticist approach, **Europe is now seeking active involvement in the Indo-Pacific** in collaboration with its NATO allies and like-minded countries, such as India.

The Strategic Compass, adopted in 2022 to guide the implementation of the EU's Security and Defence policy globally, acknowledges the global competition and geopolitical tensions happening in the Indo-Pacific. It highlights the importance of partnering with countries in the region as the EU strives to establish itself as a significant actor. On the first anniversary of the Strategic Compass, the inaugural Schuman Forum convened numerous international partners and like-minded countries. Additionally, the recently published EU Maritime Security Strategy places particular emphasis on the Indo-Pacific. EU NAVFOR Atalanta has **engaged in partnerships with regional players**, conducting joint naval exercises with India, South Korea or Indonesia between 2021 and 2022.

As an active member of both the EU and NATO, Spain is dedicated to this mission. India and Spain **share mutual interests in maritime governance**, facilitated by interaction channels such as the Indian Ocean Naval Symposium (IONS), where Spain participates as an observer. Spain's engagement in Operation Atalanta has provided an avenue for its participation in the region. Following Brexit, the operational headquarters moved from London to Naval Station Rota in Spain. In February 2023, the Force Commander of Task Force 456 was handed over to Spanish Captain Juan María Ibáñez Martín.⁹ Later in 2023, the EU and India

⁹ For more information on Operation Atalanta, see the Concept Paper elaborated by the Spain-India Observatory on the occasion of the II Spain-India Dialogue titled: "Maritime Security, Governance, and Connectivity in the Indo-Pacific: The Central Role of India and Opportunities for Bilateral Cooperation". [http://www.spain-india.org/files/documentos/EN-Concept_Paper-Maritime_Indo-Pacific_\(1\).pdf](http://www.spain-india.org/files/documentos/EN-Concept_Paper-Maritime_Indo-Pacific_(1).pdf)

conducted their inaugural joint naval exercise in the Gulf of Guinea, featuring the participation of the Ship Tornado from the Spanish Navy.

Building up stronger connectivity ties

In 2005, **Europe and India initiated a strategic partnership**, further solidified in 2020 with the endorsement of the “EU-India Strategic Partnership: A Roadmap to 2025” during the 15th European Union-India Summit. This Indo-European Roadmap gained strength in 2021 with the introduction of the “EU and India Connectivity Partnership,” aiming for a comprehensive collaboration to support resilient and sustainable connectivity, both within India and throughout third countries and regions. This partnership could play a pivotal role in reshaping connectivity dynamics in the Indo-Pacific, advocating for a more sustainable, equitable and transparent framework for infrastructural investments in the region.¹⁰

India has a key position, not only in offering an alternative to the global supply chain on its own but also leading those Asian economies collectively possessing a substantial industrial fabric that could provide an attractive and competitive alternative to China.¹¹ **Connectivity is paramount** within these endeavours. The announcement of the India - Middle East - Europe Economic Corridor (IMEC) aimed at promoting India as an Asian hub in global supply chains. Despite the challenges triggered by current geopolitical tensions, the IMEC seeks to establish a multi-modal transport corridor linking India and Europe, striving for both social and environmental sustainability.

Spain could serve as a valuable partner for achieving these connectivity goals, acting as a node for the Western Mediterranean Sea – Atlantic Ocean while contributing at the same time to India’s central position in creating resilient global supply chains. The active **participation and commitment of Spanish companies in the Indian supply chain** is evident through their substantial investments in various production centres across India. With almost 100 manufacturing facilities established across the Indian territory (see Figure 4), these Spanish companies strategically positioning themselves within key links of the Indian supply chain. In sectors witnessing robust growth in India, Spanish technology has played a vital role in promoting supply chain development and innovation, such as renewal

¹⁰ For more insights on EU-India relations, see the Concept Paper prepared by the Spanish-India Observatory on the occasion of the I Spain-India Dialogue “Europe, India, and the Indo-Pacific: An Analysis of the European Union’s Strategy for Cooperation in the Indo-Pacific and the Global Gateway Initiative”. Available at: [http://www.spain-india.org/files/documentos/ES-Concept Paper-Europa India y el Indo-Pacifico.pdf](http://www.spain-india.org/files/documentos/ES-Concept%20Paper-Europa%20India%20y%20el%20Indo-Pacifico.pdf)

¹¹ For understanding the implications of the so-called *Altasia*, see the Concept Paper prepared by the Spanish-India Observatory on the occasion of the III Spain-India Dialogue “Towards Resilient Supply Chains in the Indo-Pacific: India as an Alternative for Spanish Companies”. Available at: [http://www.spain-india.org/files/documentos/EN-Concept Paper-Resilient Supply Chains in the Indo-Pacific.pdf](http://www.spain-india.org/files/documentos/EN-Concept%20Paper-Resilient%20Supply%20Chains%20in%20the%20Indo-Pacific.pdf)

energy with key players like Acciona or Gamesa. Notably, automotive components manufactured in India by Spanish companies such as Gestamp, CIE Automotive or Grupo Antolín have been instrumental in Indian automotive sector's expansion.¹² This partnership between Spain and India exemplifies a shared trust in technological transfer, with a commitment to upholding consistent rules for all parties and effectively contributing to the "Make in India" aim.

Location	Number of Manufacturing Centres	Spanish Companies
Pune	22	Bossar Packaging; CIE Automotive (9): Cikautxo; Ferro Performance; Gestamp (2); Grupo Antolín; HRS Heat; Infracra; Kupsa; Miju; RPK; Walter Pack; Zirkel Infracra
Chennai	15	Blendhub (2); Ferro Performance; Frenos Iruña; Gestamp; Glual Hidráulica; Grupo Antolín; Hine Renovables; Industrias Barga; Ingeteam; Laulagun Bearings; Roca (3); Siemens Gamesa
Bangalore	12	Afher Eurobelt; CIE Automotive (5); CIPSA Circuits; Digiproces; Grupo Antolín; Hedisa; Rafael González; ZIV
Delhi-Gurgaon	10	Azud; Ebro Foods; Ekin; Grupo Antolín; Maier; Roca (3); Walter Pack; Zahonero
Gujarat	8	CIE Automotive; Grupo Antolín; Iberchem; Mespack; Miarco; Torrecid; Windar Renovables; Zanini
Northern Maharashtra	6	Bellota Agrisolutions; CIE Automotive (3); Lasenor Emul; Tubacex
Uttarakhand	5	CIE Automotive (4); Simon
Hyderabad	3	CIE Automotive; ITP Aero; Insud Pharma
Coimbatore	3	Ampo; CIE Automotive; Gorlam Team
Madhya Pradesh	2	Biotoools Biotechnological & Medical Laboratories; Roca
Mumbai	2	Danosa; Savera
Kolkata	2	Jaso; Sarralle
Jaipur	1	Grupo Torrent

¹² For an analysis of the presence of Spanish companies in India and the dragging effect on Spanish SMEs that serve as suppliers to Spanish global companies, see Working Paper 4 of the Spain-India Report 2020. Available at: [http://www.spain-india.org/files/documentos/2020_DOC_3_INFORME_ESPANA_INDIA_ENG\(2\).pdf](http://www.spain-india.org/files/documentos/2020_DOC_3_INFORME_ESPANA_INDIA_ENG(2).pdf)

Andhra Pradesh	1	Siemens Gamesa
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Figure 4: Spanish Manufacturing Centres in India grouped by location

Source: Own elaboration based on information available at the companies' annual reports, press releases and websites

Institutional and financial frameworks for boosting bilateral projects

To achieve this partnership with India, the India-EU institutional architecture will play a crucial role in identifying and promoting key joint projects. The recent launch of the **Trade and Technology Council (TTC)** holds significant potential to enhance their strategic autonomies, foster technology-based cooperation and facilitate trade dialogue. The TTC, that conducted its inaugural ministerial forum in May 2023, is EU's second after the EU-US council established in 2021. Moreover, following a 9-year hiatus, the European Union and India resumed negotiations for a Free Trade Agreement in June 2022. Simultaneously, they initiated separate negotiations for an Investment Protection Agreement and an Agreement on Geographical Indications

The EU is strongly committed to advancing its connectivity strategy by leading global sustainable infrastructure development. In pursuit of this objective, the EU initiated the **Global Gateway** initiative in 2021 —a €300 billion international investment project— as the most extensive roadmap to close the global gap on physical infrastructure while enabling the right environment to promote those projects. Notably, the Indo-Pacific is not only one of the target regions in Global Gateway, but it also triggers a specific connectivity model. Global Gateway builds on the achievements of the 2018 EU-Asia Connectivity Strategy that has successfully concluded connectivity partnerships with India and Japan. Collaboration with India in connectivity projects stands out as a significant outcome, highlighted by the EU Connectivity Conference held in Meghalaya in June 2023. This event aimed to explore opportunities to enhance connectivity investments in India's Northeastern States and with its neighbouring countries.¹³

Both Spanish institutions and the business fabric are poised to play integral roles in implementing these EU initiatives. The Indo-Spanish Innovation Programme (ISIP) has demonstrated a **bilateral complementarity in critical priority areas** where Spain and

¹³ For an analysis on the scope and reach of Global Gateway, see the Concept Paper prepared by the Spanish-India Observatory on the occasion of the I Spain-India Dialogue "Europe, India, and the Indo-Pacific: An Analysis of the European Union's Strategy for Cooperation in the Indo-Pacific and the Global Gateway Initiative". Available at: <http://www.spain-india.org/files/documentos/ES-Concept-Paper-Europa-India-y-el-Indo-Pacifico.pdf>

India share mutual interests and technological synergies.¹⁴ Many of these areas are crucial for security, governance and connectivity in the Indo-Pacific, encompassing data governance, energy transition, biotechnology or sustainable transportation. During the Foreign Affairs ministers' bilateral talks in June 2022, unexplored emerging areas for collaboration were identified. Fields such as green hydrogen, electric mobility, advanced materials or deep-sea exploration present promising opportunities for Indo-Spanish collaboration in the Indo-Pacific. Bilateral projects have also benefited from EU's €320 million Horizon 2020 funding, involving participants from both the EU and India between 2014-2020. This collaboration has expanded under the EU's Horizon Europe 2021-2027, which remains open to cooperation with India, focusing on green and digital transition.

3. Capacity-Building and Cooperation Initiatives: Synergies and Complementarities in the Realms of Defence Industry, Higher Education and Spanish Language

The key role of Indo-Spanish capacity-building projects in promoting defence self-reliance

India is central in the evolving defence landscape of the Indo-Pacific region. In this context, Spain has emerged as a significant partner for India in the realm of defence capacity-building. Spain's innovative and competitive defence industry, its willingness to facilitate technological transfers and manufacturing in India, and its non-compromised position in the region contribute to this partnership. There have been notable instances of successful collaboration between India and Spain, aimed at **enhancing military capabilities and promoting self-reliance** within the Indian defence manufacturing sector through Spanish technological designs.

Out of the 56 C295, the medium tactical transport aircrafts manufactured for the Indian Air Force under the **Airbus Defence and Space (ADS) C295 Program**, the initial 16 are being assembled by ADS in Seville, Spain, while the remaining 40 will be manufactured and assembled in Vadodara, India, in partnership with Tata Advanced Systems Limited (TASL). The first C295 aircraft was delivered by ADS on schedule and in a fly-away condition in September 2023, just two years after the contract was signed. The first "Make in India" C295 is expected to be delivered by TASL in September 2026. TASL has also been instrumental in the installation of **Indra's naval version of Lanza 3D radar** on an Indian Navy front line

¹⁴ For an study of Spain-India relations on science, innovation and technology and the impact of the ISIP, see Working Paper 5, Spain-India Report 2020. Available at: http://www.spain-india.org/en/report_article/working_paper_5_science_technology_and_innovation

ship. As per the contract signed by Indra and TASL in 2020 within the framework of a technology transfer program, Indra is delivering a total of three complete radars, plus the core elements of its system for another 20 radars, which TASL will complete and integrate locally.

Indo-Spanish capacity-building cooperation can also enjoy of Spanish technological solutions for specific Indian defence requirements. In this regard, an illustrative example is the **Teaming Agreement (TA) signed between Larsen & Toubro (India) and Navantia (Spain)** for the purpose of submitting a techno-commercial bid for the Indian Navy's P75(I) submarine program, based on the design of Navantia's S80 class of submarines. The P75(I) program involves the integration of an Air-Independent Propulsion (AIP) system and Navantia's 3rd Generation AIP solution is considered the most advanced and efficient AIP system in the world. This partnership between Navantia and L&T could be extended to the pending tender of the Indian Navy for the amphibious Landing Platform Dock (LPD).

Higher education as an untapped asset

The Indo-Spanish higher education cooperation and exchanges has **potential for improvement** considering the complementarities and synergies both systems share.¹⁵ While the Spanish university system is rooted in the European Union —with access to the EU financing and mobility programmes— and has a broad institutional network with Latin America, the Indian university system —one of the largest in the world that has expanded by more than 400 percent since 2001 (Brooking India, 2019)— has robust links with Asian countries, the Commonwealth and the United States.

Despite the vast numbers of the Indian higher education system —41 million students in 1,057 universities in India (AISHE, 2022) compared to 1.7 in 86 universities in Spain (Ministerio de Universidades, 2023)—, **similarities can be found between both university systems**. They have a great capacity to attract students and researchers; India in the Indo-Pacific region and Spain among Spanish-speaking countries. They also balance veteran institutions with newer ones, ranging in India from the Universities of Calcutta, Madras and Mumbai founded in 1857, to the 20,000 colleges created in just a decade; and in Spain from the University of Salamanca, founded in 1218, to the four Spanish universities ranked among the top 50 under 50 years (QS Top 50 Under 50, 2021). Both systems are frontrunners in targeted education and research specialization, with prime examples like IITs in India and polytechnic universities in Spain. Finally, they also play a crucial role in training global leaders; India has educated CEOs of companies like Alphabet-Google,

¹⁵ For an in-depth study of Spain-India higher education relations, see Working Paper 7 of the Spain-India Report 2020. Available at: http://www.spain-india.org/en/report_article/working_paper_7_education_and_language_teaching

Microsoft, Pepsico, and Adobe, while two Spanish institutions —IE and IESE— are ranked among the top 10 global MBA programs (QS Global MBA Rankings, 2023).

Despite the positive **progress in Indo-Spanish mobility in recent years**, there is a promising untapped potential, especially if financial opportunities like the Erasmus+ program 2021-2027, research networks, or the complementarities in their international expansion are considered (see Figure 5). A global partnership between India and Spain in higher education could be highly beneficial for bridging the gap in the trilateral —Indo-Pacific-EU-Latin America— university cooperation, technological research and training in Spanish language.

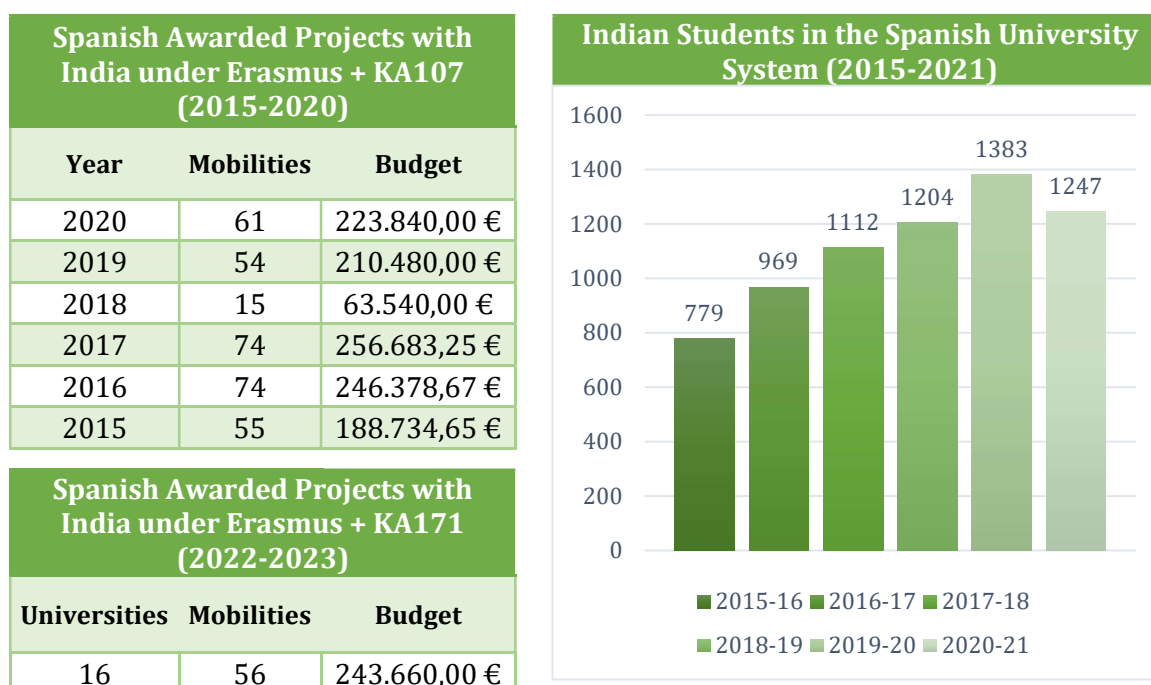


Figure 5: The Indo-Spanish university mobilities: Spanish awarded projects with India under Erasmus + (number of mobilities, budget awarded and Spanish universities involved -2022-23-) and number of Indian students in Spain per academic year

Source: SEPIE and Sistema Integrado de Información Universitaria (SIIU)

The global dimension of the Spanish language

The Spanish language, with 496 million native speakers, is the world's second-largest mother tongue and the fourth most spoken language globally, following Hindi. It ranks as the third most widely used language on the internet and **the second most prevalent on key digital platforms** like Facebook, Wikipedia, YouTube, Twitter, and LinkedIn (Anuario del Instituto Cervantes 2022, 2023). Latin America and the Caribbean (LAC) are home to

82% of Spanish speakers, with Spanish being the official language in 18 LAC countries and Puerto Rico. With nearly 24 million students learning it as a foreign language, the global interest in the Spanish language is undeniable.

Excluding Chinese, Spanish is the **largest mother tongue in the Global South**, followed by Hindi, Bengali, and Portuguese. Furthermore, the Hispanic and Indian diasporas have promoted the spread of their languages in countries such as the United States, where 42 million people speak Spanish at home, along with 810,000 Hindi speakers and 434,000 Gujarati speakers (American Community Survey, 2018 and 2022). Moreover, the United States is projected to become the world's second-largest Spanish-speaking country by 2060, with 27.5% of its population of Hispanic origin (Anuario del Instituto Cervantes 2022, 2023).

The **expansion of the Spanish language in India** is increasingly seen as a key asset for India's global vision. India could benefit from the Spanish language in connecting its business fabric, technological ecosystem and higher education network with the world, and Spain could be instrumental in this aim. Since the launch of the National Education Policy (NEP) in 2020, the Spanish language has been introduced into the Indian public education system, with an initial project being implemented by the Delhi Board of School Education. Nowadays, more than 25 thousand Indian students from private and public schools learn Spanish (Pujol, 2020). Moreover, the Instituto Cervantes in New Delhi achieved global leadership in 2015, reaching a significant milestone in 2018-19 with 481,410 teaching hours. In addition to this, the Spanish Cooperation Agency, AECID, has established a network of seven language assistantships in various Indian universities, and the Ministry of Education of Spain launched a language assistant program for Indian candidates in 2019, reaching a total of 385 Indian assistants in 2022-23.¹⁶

Conclusion: Sizing the role of India and Spain as Global Partners

India's global vision

The Indian presidency of the G20 has represented a significant milestone in India's global vision. During its tenure, India has championed a **human-centric growth model** while maintaining its autonomy and pragmatic vision. Committed to supporting the creation of a global alternative for inclusive growth, India has shown itself ready to play a pivotal role in diversifying supply chains, fostering the green and digital transition, and adopting a

¹⁶ For an in-depth study of the Spanish language in India, see Working Paper 7 of the Spain-India Report 2020. Available at: http://www.spain-india.org/en/report_article/working_paper_7_education_and_language_teaching

resilient and collaborative approach to global pandemics. There is a growing recognition of India's indispensable position in addressing existing challenges, and the country is steadfast in its commitment to uniting different nations under a shared global agenda. India's historical legacy of non-violent freedom struggle, its deep-rooted democratic principles and its commitment to social inclusiveness and international values of peace, security and cooperation form a robust narrative that can resonate globally.

There has been a **change of paradigm in the India-EU relations**. In the emerging global architecture, India and the European Union have acknowledged each other as committed partners with common interests and goals without compromising their strategic autonomies. The strategic priorities of India and the EU have converged in a joint compromise on security, connectivity and global growth. Despite differences and remaining challenges, India is committed to strengthen the economic and commercial ties with the EU and develop the bilateral institutional architecture to deepen this partnership within joint frameworks such as the TTC or the connectivity partnership.¹⁷

During its presidency of the G20, India has envisioned itself as a **bridge to the Global South**. India has shown strong ties with the Indo-Pacific, emphasizing its crucial position in the region and actively addressing key challenges in collaboration with regional countries and global actors. Beyond the Indo-Pacific, India is strategically looking to expand its influence in further regions within the Global South. In Latin America, there has been a noticeable increase in India's institutional and economic engagement. Simultaneously, North Africa emerges as a potential key partner for the development and implementation of the India-Middle East-Europe Economic Corridor (IMEC).

Spain's global vision

Spain positions itself as a committed global partner, **aligning with the principles of multilateralism, the international rules-based framework and the 2030 Agenda along with its Sustainable Development Goals**. Embracing a feminist foreign policy and having served on the Human Rights Council twice —from 2011 to 2013 and from 2018 to 2020—, Spain has recently presented its candidacy for the 2025-2027 term, highlighting its ongoing commitment to the protection and promotion of human rights and gender equality. Spain also pledges to transition into a circular and carbon-neutral economy by 2050 to mitigate the impacts of climate change.

¹⁷ For a reflection on India's Foreign Policy and EU-India cooperation future perspective, see the Outcome Paper prepared by the Spanish-India Observatory on the occasion of the II Spain-India Dialogue "Samir Saran's Visit to Spain: A Reflection on India's Participation in the Indo-Pacific and the World". Available at: http://www.spain-india.org/files/documentos/EN-Outcome_Paper-Samir_Saran_Visit_to_Spain.pdf

The Spanish leadership of the Council of the European Union has been crucial in advancing a **new global strategic agenda for the EU**. Under the Spanish presidency, three key summits were successfully conducted, highlighting Spain's leading efforts. These include the summit between the EU and the Community of Latin American and Caribbean States (CELAC), the European Political Community Summit in Granada —which brought together forty European heads of state and government, including President of Ukraine—, and the informal European Council that set a new strategic agenda and laid the foundation for the enlargement of the European Union.

Spain's long-term commitment, institutional architecture and socio-cultural ties with Latin America and the Northern African vicinity have been pivotal factors in achieving these milestones. Spain stands as one of the main investors in Latin America and holds a significant presence in key sectors of its development and social modernization process. The Mediterranean is a top priority in Spanish foreign policy, fostering not only a neighbourhood relationship but an interdependent engagement for inclusive growth in North Africa. Furthermore, Spain is reinforcing its presence in Indo-Pacific and acquiring the necessary tools adapted to the new realities of the region. Its non-compromised relationship with regional actors, its adherence to a rules-based order, its commitment to regional stability and its willingness to participate in capacity-building projects give Spain a renewed position for a more active role in the Indo-Pacific region.

Perspectives of India and Spain as global partners

Throughout their presidencies in 2023 of the G20 and the Council of the European Union respectively, India and Spain have converged in a shared call for international dialogue and cooperation to address current global challenges. Additionally, the complementarity in their engagements across various regions —India as a key partner for Spain in the Indo-Pacific and Spain for India in the EU with a broad institutional and economic architecture in LAC and in the Mediterranean—, aligned visions for achieving development goals, successful collaboration in key bilateral projects and a relationship free of irritants establish them as **natural partners on the global stage to engage in the long-term**.

A global partnership between India and Spain could help **bridge the gap in the still untapped trilateral cooperation framework** involving the Indo-Pacific, the EU and Latin America. The higher education field could be an excellent starting point to create trilateral networks for university exchanges, technological research and vocational training. The Spanish language remains as a key asset with great potential in connecting the business fabrics, technological ecosystems and higher education networks of these regions. This alignment between Spain and India also extends to strategic sectors of collaboration. In the realm of defence industries, Spain has emerged as a key partner for India in capacity-building, facilitating technological transfers as well as contributing to India's "Make in India"

initiative. In return, India offers Spain a vital partnership for the internationalisation of its technological designs. This model of partnership has also been successful in other fields such as automotive components, renewable energy or food processing, and could be explored in further technology-based and innovation-driven sectors.

Establishing a **new bilateral institutional architecture** would significantly enhance these exchanges. The Spain-India Observatory, with its 2023 focus on exploring the Indo-Spanish partnership in the Indo-Pacific region, has been promoting an informal Track 2 dialogue format. The four Spain-India dialogues conducted in 2023 have engaged non-governmental actors in open discussions covering various topics around the bilateral partnership in the Indo-Pacific region. These discussions have culminated in outcome papers, highlighting the key conclusions of the interactions held. There is potential for these dialogues to develop into an institutionalized platform for Indo-Spanish Track 1.5 discussions including also governmental actors in the future. Spain-India relations could undoubtedly benefit from institutionalized sectoral dialogues that engage both countries' civil societies and governments, promoting increased governmental visits and interactions between the two countries.

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