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Beyond IMEC: Stratified Resilience and the Limits of Flagship Connectivity in EU-India Geoeconomic Strategy

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Research Article

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Abstract

The India-Middle East-Europe Economic Corridor (IMEC), launched in September 2023, was framed as the most ambitious EU-India geoeconomic initiative in two decades and a counter-architecture to China's Belt and Road Initiative. Within weeks, the October 2023 Gaza conflict paralysed its western corridor, exposing a dependence on the political consent and transit access of third-party states that neither partner commanded. Yet EU-India cooperation did not collapse. This paper asks why cooperation persisted unevenly across sectors.

The paper identifies stratified resilience as the observed pattern of uneven cooperation persistence, and explains it through institutionalisation depth: the density of bilateral frameworks in place before the disruption. Digital cooperation continued through three post-disruption Trade and Technology Council (TTC) milestones, a stock-taking meeting in November 2023 and ministerial meetings in February 2025 and July 2026, while negotiations on the EU-India FTA (Free Trade Agreement), including its Digital Trade chapter, concluded in January 2026 on a separate track. Energy cooperation persists through the Clean Energy and Climate Partnership (CECP), with EU-side commitment but no Indian central government commitment established in the sources examined. Transport, lacking any standing bilateral framework, shows IMEC persisting only declaratorily.

Theoretically, the paper distinguishes announcement capacity from implementation capacity in geoeconomic statecraft, arguing that institutional density accumulated through iterative negotiation sustains cooperation under geopolitical stress. The argument is developed through process-tracing of official EU and Indian documents from October 2023 to July 2026, with falsification conditions specified.

1. Introduction

On 9 September 2023, on the sidelines of the G20 New Delhi Summit, the European Union, India, the United States, Saudi Arabia, the United Arab Emirates, Italy, France, and Germany signed a MoU (Memorandum of Understanding) launching the India-Middle East-Europe Economic Corridor (IMEC). Jordan and Israel, as transit states, were not signatories. Described by European Commission President Ursula von der Leyen as a "green and digital bridge across continents," IMEC was framed as the most ambitious EU-India geoeconomic initiative in two decades and a direct, if diplomatically unacknowledged, counter-architecture to China's Belt and Road Initiative (BRI) (European Commission 2023a; White House 2023). The announcement generated considerable political momentum, with leaders on both sides committing to a corridor that would link Indian ports to Gulf terminals and onward through Jordan and Israel to European markets.

Within four weeks, the political conditions underwriting IMEC's western corridor changed fundamentally. The Hamas attacks of 7 October 2023 and Israel's subsequent military operations in Gaza undermined the regional political conditions on which the corridor's western leg depended, above all the prospect of Israeli-Saudi normalisation (Ministry of Foreign Affairs, Kingdom of Saudi Arabia 2024; Suri et al. 2024), and left that leg without a realistic route to implementation. By early 2024, what had been announced as a landmark geoeconomic initiative was, at the EU-India level, largely reduced to rhetorical commitments sustained through summit communiqués (European Council 2026; EEAS 2025; Suri et al. 2024).

Yet EU-India geoeconomic cooperation did not collapse. Trade and technology negotiations advanced. Clean energy frameworks deepened. The 16th EU-India Summit on 27 January 2026 marked the conclusion of negotiations on the EU-India FTA, including its Digital Trade chapter (European Council 2026). The partnership's institutional architecture continued to develop in some sectors. This divergence between the paralysis of the partnership's flagship corridor and the advancement of its quieter institutional tracks is the empirical puzzle this paper addresses. The research question is: what explains variation in the persistence of EU-India connectivity cooperation across sectors following the IMEC disruption?

The argument advanced is that EU-India geoeconomic strategy exhibits stratified resilience: the observed pattern of uneven cooperation persistence across sectors. This paper explains that pattern through institutionalisation depth, the density of pre-existing bilateral frameworks at the moment of disruption. Where bilateral frameworks pre-existed the October 2023 disruption, cooperation has demonstrated adaptive continuity. Where no such standing bilateral framework existed, as in the case of IMEC itself, joint commitment has remained declaratory despite sustained political signalling from both sides.

The paper proceeds as follows. Section 2 develops the theoretical framework, introducing geoeconomic statecraft as the primary lens, stratified resilience as the pattern to be explained, and institutionalisation depth as the explanation. Section 3 examines IMEC's

architecture and the structural vulnerabilities exposed by the Gaza disruption. Section 4 presents the sectoral evidence across transport, digital, and energy. Section 5 develops the explanatory analysis. Section 6 draws implications for EU-India partnership strategy and geoeconomic theory before the conclusion.

2. Theoretical Framework: Geoeconomic Statecraft and Stratified Resilience

2.1 Geoeconomic Statecraft

Geoeconomic statecraft holds that states deploy economic instruments including trade policy, investment flows, infrastructure finance, technology transfer, and sanctions to achieve strategic and geopolitical objectives (Blackwill and Harris 2016). Distinguished from classical geopolitics by its instrumentalization of economic interdependence rather than territorial control, geoeconomics has emerged as the dominant mode of great-power competition in the post-Cold War international order (Luttwak 1990).

Wigell's (2016) framework defines geoeconomics as "the geostrategic use of economic power," in which economic and security considerations intertwine to shape foreign policy conduct. He distinguishes between competitive geoeconomic strategies (neo-mercantilism, neo-imperialism) and more cooperative forms (hegemony, liberal institutionalism) in which states use economic engagement to build strategic partnerships and shape regional order. EU-India connectivity investment falls squarely into this cooperative category: neither partner seeks to coerce the other, but both use infrastructure, trade, and technology frameworks to build strategic depth against Chinese BRI expansion in Indo-Pacific and Eurasian corridors (Wigell, Scholvin and Aaltola 2019).

The systemic motivation for EU-India connectivity investment is grounded in defensive realism's balance-of-threat logic (Walt 1987). China's BRI represents a compound strategic challenge: it combines economic penetration of strategically significant geographies with cultivation of bilateral dependencies that may constrain host-state foreign policy autonomy (Chellaney 2017; Hillman 2018). Both the EU and India perceive this as a structural challenge to their respective strategic interests. IMEC, Global Gateway, and the broader EU-India connectivity partnership are instruments of defensive geoeconomic balancing. However, balance-of-threat logic explains why EU and India invest in connectivity cooperation. It does not explain why some tracks of that cooperation survive geopolitical disruption while others do not. That explanatory gap is where this paper's contribution lies. The geoeconomic statecraft literature (Farrell and Newman 2019; Wigell 2016) theorises the conditions under which states deploy economic instruments but says relatively little about the conditions under which those deployments sustain themselves under geopolitical disruption. This paper addresses that gap by naming the pattern of uneven persistence (stratified resilience) and proposing an explanation for it (institutionalisation depth).

2.2 Stratified Resilience: Definition and Operationalisation

This paper introduces stratified resilience as a descriptive-analytical concept naming an observed pattern of uneven cooperation persistence across sectors of a bilateral partnership under geopolitical disruption. The concept does not itself explain the pattern; it names what requires explanation. The explanatory mechanism is institutionalisation depth, defined as the density of pre-existing bilateral frameworks, including standing working groups, ministerial oversight, a founding mandate and a record of meetings, at the moment of disruption.

The research design distinguishes pre-disruption institutional conditions from post-disruption outcomes. The independent variable is institutionalisation depth, assessed for each sector before 7 October 2023 against four features documented in official sources: (i) a standing working group or equivalent permanent body; (ii) ministerial-level oversight; (iii) a founding mandate or work programme set out in a joint document; and (iv) at least one meeting held under the framework, separate from its launch event. Each feature is coded present, absent, or not established in the sources examined; “not established” is never counted as absence. The coding is reported as an unweighted checklist (Table 1). Funding is not part of this measure, because financial commitment is an outcome. The dependent variable is cooperation persistence after October 2023, assessed through two primary outcomes: financial commitment (documented allocations, with amounts, sources, dates and status, compared with any pre-October 2023 baseline) and framework advancement (concrete negotiated outputs or procedural changes). Financial commitments are attributed to a sector’s framework only where an official source links them to it; other relevant engagement is reported as concurrent. Operational activity, meaning the continued meeting of bilateral bodies, is reported as supporting evidence only, since standing bodies may meet for reasons unrelated to the disruption. Where evidence is unavailable, the outcome is coded as not established rather than as zero. This matters most for transport and for Indian government-level financial engagement in energy.

October 2023 defines the temporal boundary of the analysis and marks the episode of geopolitical stress against which cooperation persistence is assessed. The paper does not treat the event as an independently estimated causal variable. Instead, it examines how pre-existing institutional conditions relate to variation in cooperation outcomes during the subsequent period. In the transport case, the disruption exposed IMEC's prior dependence on political consent and transit access controlled by third-party states. This dependence is a feature of the corridor's design, not a measure of institutionalisation depth itself.

A related but distinct concept is third-party territorial permissiveness, defined here as the willingness and ability of states outside the EU-India partnership to permit the political arrangements, transit access, and infrastructure connections required for a corridor to function. Unlike institutionalisation depth, which concerns the density of bilateral arrangements between the EU and India, territorial permissiveness concerns the external political and territorial conditions on which connectivity projects depend. It is therefore treated as a condition affecting the viability of corridor implementation, rather than as a measure of bilateral institutionalisation or as a proxy for the regime type of third-party states.

Table 1 report the coding.

Table 1
Institutionalisation depth before 7 October 2023

Sector	Standing working groups or body	Ministerial oversight	Founding mandate	Meeting under the framework, beyond launch	Features confirmed present
Transport (IMEC)	Absent (MoU provided for coordinating entities; none documented before 7 Oct 2023)	Absent	Absent as a bilateral framework (multilateral MoU, 9 September 2023)	Absent	0 of 4
Digital (TTC)	Present (three working groups)	Present (ministerial co-chair)	Present (TTC launched 2022; work programme in 16 May 2023 joint statement)	Present (first ministerial,16 May 2023)	4 of 4
Energy (CECP)	Present (India-EU Energy Panel)	Not established (panel co-chaired at senior-official level)	Present (2016 CECP; work programme to 2023 agreed December 2021)	Present (Energy Panel session, 01 December 2021)	3 of 4 (1 not established)

*Note: coded from official documents dated before 7 October 2023 as present, absent, or not established. Only features confirmed present are counted; "not established" is reported separately and is not treated as absence. IMEC is coded on the bilateral EU-India criterion. The multilateral MoU provided for coordinating entities and an action plan, and a steering committee is reported since IMEC's creation (*Pratap 2026*), but neither is a documented bilateral EU-India framework before 7 October 2023. If the MoU is counted as a founding mandate, IMEC scores 1 of 4, and 2 of 4 if the steering committee also predated the disruption; the ordering of sectors is unchanged. Funding is not scored here, because financial commitment is an outcome (*Table 2*). The checklist is unweighted. Sources: White House (2023);* European Commission (2023b)*; MEA (2021).*

The explanatory mechanism connecting the independent to the dependent variable runs as follows. Sectors with pre-existing bilateral frameworks generate three properties absent in ad hoc summit announcements: agenda continuity through standing mechanisms that operate regardless of external political conditions; institutional insulation, since framework mandates are not contingent on corridor logic; and political decoupling, since framework-level cooperation does not require the political consent and transit access from states outside the EU-India partnership on which corridor-level initiatives depend. These properties generate cooperation persistence under geopolitical stress. Sectors without pre-existing frameworks lack all three, producing declaratory persistence: a condition in which both parties maintain public commitment language because the political cost of acknowledged failure exceeds the reputational cost of sustained ambiguity, but in which no operational progress occurs.

The concept of stratified resilience thus distinguishes between two capacities that geoeconomic statecraft literature has tended to conflate: announcement capacity, the political ability to launch flagship initiatives with high symbolic visibility, and implementation capacity, the institutional ability to sustain cooperation across sectors under conditions of geopolitical disruption. EU-India has demonstrated high announcement capacity and uneven implementation capacity. IMEC is the clearest illustration of this disjuncture.

2.3 The EU Integration Dimension

EU integration theory offers a productive reference point for understanding the stratified resilience pattern. Neofunctionalist scholarship has long recognised that durable cooperation develops through incremental functional collaboration rather than grand political announcements. Haas's (1958) neofunctionalism and Lindberg's (1963) analysis of the Common Market both identify the accumulation of institutional density through iterative negotiation as the mechanism through which political commitments acquire operational content. The stratified resilience finding in EU-India geoeconomic strategy echoes this pattern: the partnership's most durable tracks are those that accumulated institutional depth through iterative processes, not those launched with maximum political visibility. IMEC represents the inverse of the neofunctionalist logic: a summit announcement with political ambition but without the prior functional cooperation that would generate institutional continuity under stress.

2.4 Falsification Conditions

The argument would be falsified if sectors scoring lower on the Table 1 checklist showed equivalent or stronger persistence than sectors scoring higher. More specifically, it would be falsified under the following conditions. First, if sectors with deep pre-existing institutional frameworks (digital via TTC, energy via CECP) showed equivalent stalling to transport in the October 2023 to July 2026 period, the institutionalisation depth mechanism would be invalidated. Second, if IMEC received substantial new bilateral financial allocations post-disruption, specifically persistent leader-level commitment combined with new financial instruments over a twelve-month period, this would suggest that political salience alone can substitute for institutional depth, contradicting the paper's central claim. Third, if transport resilience emerged through a mechanism other than institutionalisation depth, for example through bilateral state-to-state capital contracts analogous to BRI modalities, the explanatory mechanism would require revision. As Sections 3 and 4 demonstrate, none of these falsification conditions are met in the period under review.

2.5 Methodological Note

The argument is developed through process-tracing of official EU and Indian documents, financial allocations, and partnership frameworks spanning October 2023 to July 2026. Primary source citations (MEA, European Council, EEAS, EIB, European Commission) are verified against official documents. Secondary sources (GRC, IMPRI, IISS) and press reporting (Mint) are used for interpretive framing and context. Where they are the only available record (the sixty-day meeting that did not take place, and the steering committee), the claim is presented as reported. Indian strategic intent regarding INSTC as a hedge against IMEC stalling is inferred from secondary policy analysis rather than official MEA statements, a standard limitation for papers assessing strategic intent from observable behaviour.

3. IMEC's Architecture and Structural Vulnerabilities

IMEC was designed to serve three interlocking strategic functions. First, as a supply chain diversification instrument: the corridor would offer an alternative routing for goods between India and Europe that bypassed both the Suez Canal and Chinese-operated or Chinese-adjacent port infrastructure. Second, as a geoeconomic counter-architecture to BRI: by linking Indian, Gulf, and European infrastructure investment under a common political umbrella, IMEC sought to demonstrate that democratic market economies could offer a credible connectivity alternative (European Commission 2023a; White House 2023). Third, as a deepening mechanism for EU-India strategic partnership: IMEC provided a concrete project anchoring what had been a relatively thin bilateral relationship in infrastructure, logistics, and energy transit.

The corridor's architecture embedded a structural vulnerability that was visible before October 2023 but received insufficient analytical attention. IMEC's western corridor depended on several political conditions: progress towards Saudi-Israeli normalisation under the Abraham Accords framework, the participation of Jordan and Israel as transit states, and sustained Gulf state political alignment with a corridor running through Israeli territory. The Abraham Accords-I2U2 (India, Israel, UAE, US) nexus that underwrote IMEC's design assumed a trajectory of Arab-Israeli normalisation that the October 2023 disruption reversed (Gold 2024). None of these conditions were EU-India variables. Both partners were structurally dependent on the political consent and transit access required from states outside the EU-India partnership, which they could neither command nor credibly guarantee (Suri et al. 2024). This dependence, termed third-party territorial permissiveness in Section 2.2, was constitutive of IMEC’s design rather than an external contingency: the corridor’s routing logic required it as a precondition, not merely a facilitating condition. The October 2023 disruption did not create this vulnerability; it revealed it.

Following the disruption, Saudi-Israeli normalisation stalled: in February 2024 Saudi Arabia stated that it would not establish diplomatic relations with Israel without an independent Palestinian state and an end to the Israeli offensive in Gaza (Ministry of Foreign Affairs, Kingdom of Saudi Arabia 2024). The disruption also strained the regional political convergence underpinning IMEC. Suri et al. (2024)

observe that the war revived regional political fissures, intensified criticism of Israel by Riyadh and Abu Dhabi, and undermined the conditions for the active cooperation between Israel, Jordan, Saudi Arabia and the UAE envisaged by the corridor. Early peer-reviewed assessments identified the Israel-Hamas conflict and subsequent Israel-Iran escalation as direct operational challenges to IMEC's western corridor (Singh et al. 2025), confirming the structural dependency on regional geopolitical permissiveness that this paper documents. Early policy assessments similarly recognised the corridor's vulnerability to Abraham Accords normalisation breakdown (Suri et al. 2024), but neither anticipated the sectoral differentiation in EU-India resilience that this paper analyses.

The EU-India response to this disruption illustrates the pattern of declaratory persistence identified in Section 2.2. Despite limited evidence of corresponding corridor-specific operational progress, both parties continued to affirm IMEC in official communications. The Joint Statement of the 16th EU-India Summit (27 January 2026) "welcomed advances in the India-Middle East-Europe Economic Corridor (IMEC)" and stated an intention to "deepen strategic collaboration" under the framework (European Council 2026). The EEAS press release of 25 November 2025 explicitly reaffirmed IMEC as a priority (EEAS 2025). No corridor-specific financial allocation identifiable in the post-October 2023 period matches the scale of pre-launch commitments.

4. Sectoral Evidence: Stratified Resilience in Practice

4.1 Transport: The Absence of Bilateral Resilience

In the transport sector, both the EU and India maintain IMEC language in official communications, but no standing bilateral institutional framework exists to sustain operational progress independently of the western corridor’s political conditions. The MoU that launched IMEC provided for coordinating entities and for an action plan to be agreed within sixty days of signing, a deadline that fell after 7 October 2023 (White House 2023). The participants did not convene within that period (Alhasan and Solanki 2023). The MoU describes its commitments as political and creates no rights or obligations under international law (White House 2023). No standing bilateral EU-India body is documented before the disruption, and no multilateral action plan is documented in the sources examined. Later steps were bilateral: India and the UAE signed an Inter-Governmental Framework Agreement on IMEC cooperation in ports, maritime and logistics on 13 February 2024 (Press Information Bureau 2024). Discussions are reported to have taken place only at steering-committee level: in October 2026, France’s special envoy for IMEC stated that there had been only a steering committee since IMEC’s creation, that no ministerial meeting had been held, and that one was hoped for by the end of 2026 (Pratap 2026). The committee’s creation date, mandate and decisions are not documented in the sources examined, and the statement was made after the study period but describes arrangements since IMEC’s creation, so it is treated as retrospective reporting. Joint declarations continued, but the evidence does not establish a corresponding bilateral operational mechanism.

India's unilateral transport context (non-EU-India frameworks): India's unilateral and multilateral transport alternatives provide relevant context, though Chabahar and the International North-South Transport Corridor (INSTC) are not EU-India bilateral instruments. Their status is context for India’s wider connectivity options. India's engagement with Chabahar Port has undergone contractual completion amid intensifying US sanctions pressure. In the financial year 2025-26, the Government of India's Revised Estimate allocated INR 400 crore for Chabahar, transferring the final tranche in August 2025. As confirmed by the Minister of State in the Ministry of External Affairs in response to Rajya Sabha Unstarred Question No. 4405 (2 April 2026), India had fulfilled its financial commitment of USD 120 million for port equipment procurement under the contract between India Ports Global Limited (IPGL) and Iran's Ports and Maritime Organisation, and therefore made no budget allocation for Chabahar in the financial year 2026-27 (MEA 2026). Under conditions of US sanctions reimposition and IPGL management changes, contractual completion does not by itself indicate strategic renewal. This reading is contested: some analysts interpret the zero allocation as a tactical freeze driven by sanctions pressure rather than contractual fulfilment, but either interpretation confirms the absence of strategic renewal (IMPRI 2026; Gulf Research Centre 2025).

The INSTC presents a different picture. Physical infrastructure is approximately 75 percent complete, and expansion continues, but primarily on Russian and Azerbaijani momentum rather than Indian capital investment (Gulf Research Centre 2025). India's posture on INSTC is best characterised as latent optionality: maintaining access to a corridor without committing the capital that would constitute active strategic investment. This context does not itself bear on EU-India institutional resilience; the transport null case rests on the evidence on IMEC set out above. IMEC’s eastern corridor (India-UAE) has seen bilateral progress, most visibly the Inter-Governmental Framework Agreement of February 2024 on cooperation in ports, maritime and logistics (Press Information Bureau 2024). However, this progress operates on India-Gulf bilateral logic rather than EU-India bilateral logic, and it post-dates the disruption, so it does not test the pre-existing-depth hypothesis. The EU-India dimension of IMEC transport cooperation remains the null case.

4.2 Digital: Genuine Bilateral Resilience

The digital sector presents the strongest case for genuine bilateral resilience, and the explanation is structural: digital cooperation operates through the EU-India Trade and Technology Council (TTC), established in 2022, a standing bilateral mechanism with working groups, ministerial oversight, and agenda continuity that predates IMEC by more than a year and operates on a logic entirely independent of Middle Eastern geopolitics. Its first ministerial meeting, held in Brussels on 16 May 2023, set priorities for three working groups: Strategic Technologies, Digital Governance and Digital Connectivity; Green and Clean Energy Technologies; and Trade, Investment and Resilient Value Chains (European Commission 2023b). The TTC framework has three properties that IMEC lacks: agenda continuity through permanent working groups that meet regardless of corridor status; institutional insulation, since TTC mandates operate under framework logic rather than corridor logic; and political decoupling, since digital trade advancement does not require the political consent and transit access from states outside the EU-India partnership.

The post-October 2023 evidence confirms these properties in practice. The TTC held a virtual stock-taking meeting on 24 November 2023, about seven weeks after the Gaza disruption, reviewing progress across all three working groups (European Commission 2025b). This meeting was not a diplomatic courtesy; it was a stock-taking exercise within a standing mechanism, insulated from the geopolitical conditions paralysing IMEC simultaneously. The May 2023 statement anticipated a co-chairs' meeting in early 2024 in India (European Commission 2023b); the second ministerial took place in February 2025. The argument concerns the persistence of the framework, not an uninterrupted schedule. The second TTC ministerial meeting followed in New Delhi on 28 February 2025, producing joint commitments on semiconductors, AI governance, 6G standards, EV interoperability, and clean hydrogen research. The joint statement records a EUR 60 million budget from Horizon Europe with matching Indian contributions (European Commission 2025b; MEA 2025). The third TTC ministerial meeting, held on 15 July 2026, produced further commitments on semiconductors, artificial intelligence governance, 6G standards, and the launch of an EU-India Startup Partnership (European Commission 2026b).

The FTA digital chapter emerged from a separate negotiating track relaunched under the trade ministries in June 2022, running in parallel to but independently of the TTC. TTC Working Group 3 (Trade, Investment and Resilient Value Chains) explicitly "complements the ongoing FTA negotiations, which are proceeding on separate tracks" (European Commission 2025b). The in-principle agreement on the Digital Trade chapter was reached at the 12th round of FTA talks in July 2025 and confirmed at the 16th EU-India Summit in January 2026 (European Commission 2025c, 2026a; European Council 2026). The May 2023 statement likewise describes Working Group 3's work as complementing negotiations on trade, investment protection and geographical indications that "proceed on a separate track" (European Commission 2023b). The chapter is best understood as a product of the FTA negotiating track rather than a direct output of TTC activity. The parallel advancement of the FTA digital chapter provides additional evidence of continuing EU-India digital cooperation during the same period. Because the two initiatives followed separate negotiating tracks, their parallel progress does not establish that TTC activity caused or enabled the FTA outcome.

The analytical significance of this distinction is important: the digital case does not rest on the FTA chapter as a TTC product. It rests on the TTC's own demonstrated continuity. The November 2023 stock-taking meeting, the February 2025 ministerial, and the July 2026 ministerial constitute direct evidence of operational activity persisting through geopolitical disruption on the TTC's own terms. Beyond operational activity, the February 2025 and July 2026 ministerials produced new joint commitments (framework advancement), and the February 2025 statement records a EUR 60 million budget with matching Indian contributions (financial commitment), the two primary outcomes defined in Section 2.2. These three meetings, each documented through official joint statements, provide evidence consistent with the argument that pre-existing institutional frameworks help sustain cooperation under geopolitical stress. They do not, by themselves, establish that institutionalisation is the sole cause of continuity, but they support the proposed mechanism when considered alongside the contrasting transport case.

4.3 Energy: Active but Asymmetric

The energy sector demonstrates active cooperation sustained by EU institutional commitment at the government level, but structurally asymmetric due to the predominantly private-sector character of Indian engagement in the sources examined. The Clean Energy and Climate Partnership (CECP), now in its third phase (adopted 22 November 2024), provides the institutional framework covering renewable hydrogen, offshore wind, energy efficiency, and critical minerals cooperation (European Commission 2025a; MEA 2024). The January 2026 Summit announced an EU-India Task Force on Green Hydrogen and a 2026 EU-India Wind Business Summit under the CECP umbrella (European Council 2026).

EU financial commitment in the energy-adjacent space is measurable. The EIB Global announced up to USD 60 million investment in the India Energy Transition Fund in October 2025, with the fund targeting USD 300 million in total mobilisation (EIB 2025a). The EU Delegation launched a EUR 5 million Global Gateway-funded South Asia Energy Connectivity (ECSA) project in July 2026 targeting grid integration across South Asia (EU Delegation 2026). These items are concurrent EU-side engagement; the sources examined do not formally link them to the CECP. Larger EIB allocations in the same period, EUR 289.5 million for Nagpur and Pune metro expansion and EUR 300 million for the Bengaluru suburban railway (EIB 2025b; EIB 2024), represent general Global Gateway infrastructure commitments to India rather than energy-specific investments, and are cited here as evidence of sustained EU institutional engagement broadly rather than as energy sector resilience evidence per se.

Indian engagement in the energy sector has been identified primarily at the industry association level in the sources examined. Hydrogen Europe and GH2India signed a memorandum of understanding at European Hydrogen Week in November 2024 (Hydrogen Europe 2024). SolarPower Europe and the National Solar Energy Federation of India signed a memorandum of understanding in April 2025 to diversify solar value chains (SolarPower Europe 2025). No central government-level Indian green hydrogen MoU or equivalent public capital allocation to the energy partnership has been identified in the post-October 2023 period in the official MEA press releases, parliamentary answers, and industry association announcements examined. This absence of identification reflects the scope of sources consulted and should not be read as proof that no such commitment exists: state-level energy ministry allocations and off-budget financing routes were not systematically examined. The asymmetry claim is therefore specific: no central government-level financial commitment equivalent to EU institutional investment through EIB and Global Gateway has been established in the publicly available sources for the post-October 2023 period.

This asymmetry in the publicly documented forms of institutional and financial engagement is analytically significant. Energy sits between digital (genuine bilateral resilience) and transport (bilateral absence) precisely because the CECP provides EU-side institutional depth without a publicly documented equivalent on the Indian government side. The asymmetry likely reflects structural features of Indian energy governance: the predominance of state-level electricity regulation, the fiscal constraints of central government ministries, and the political economy preference for private-sector-led renewable investment. Resilience is real but unevenly documented. Table 2 reports the outcomes across the three sectors.

Table 2

Cooperation persistence after October 2023

Sector	Financial baseline before Oct 2023	Financial commitment after Oct 2023	Framework advancement	Operational activity (supporting)	Outcome
Transport (IMEC)	None identified	No bilateral EU-India allocation identified	None identified; the India-UAE framework agreement (Feb 2024) is not an EU-India instrument (Press Information Bureau 2024)	Political declarations (EEAS 2025; European Council 2026); steering-committee discussions reported retrospectively, no documented decisions (Pratap 2026)	Declaratory persistence
Digital (TTC)	No dedicated TTC fund identified; none stated in the May 2023 joint statement (European Commission 2023b)	EUR 60m Horizon Europe budget with Indian matching contributions, recorded in the TTC joint statement (Feb 2025; European Commission 2025b; MEA 2025)	New joint commitments at the Feb 2025 and Jul 2026 ministerials (European Commission 2025b, 2026b). Parallel FTA track, not counted as TTC advancement: Digital Trade chapter concluded 27 Jan 2026 (European Council 2026)	Stock-taking meeting (24 Nov 2023); ministerials (Feb 2025, Jul 2026)	Genuine bilateral resilience
Energy (CECP)	No dedicated CECP fund identified. The Dec 2021 Energy Panel work programme includes the India-EU Financing Investment in Clean Energy Platform, a facilitation platform with no amount stated (MEA 2021)	No CECP-specific financial commitment identified. Concurrent engagement, not formally linked to the CECP in the sources examined: EU-side, EIB Global up to USD 60m to the India Energy Transition Fund (Oct 2025) and EUR 5m for the regional South Asia ECSA project (Jul 2026); industry-level, MoUs between Hydrogen Europe and GH2India (Nov 2024) and between SolarPower Europe and NSEFI (Apr 2025), with no amounts stated. Indian central government commitment not established in sources examined	CECP Phase III (22 Nov 2024; MEA 2024); Green Hydrogen Task Force announced under the CECP umbrella (Jan 2026; European Council 2026)	10th India-EU Energy Panel meeting (22 Nov 2024; MEA 2024)	Asymmetric resilience

Note: "None identified" and "not established" refer to the limits of the sources examined, not proof of absence. Concurrent engagement is reported for context and is not coded as a CECP outcome.

5. Explaining the Variation: Institutionalisation Depth as Mechanism

The sectoral evidence maps onto the stratified resilience pattern. Variation in cooperation persistence across transport, digital, and energy is consistent with the proposed explanation based on pre-existing institutionalisation depth. The comparison examines whether differences in institutional conditions before October 2023 correspond to differences in post-disruption operational activity, financial commitment, and framework advancement. The evidence is assessed through two primary outcomes, financial commitment and framework advancement; operational activity is reported as supporting evidence only (Section 2.2).

Digital had the TTC, established in 2022, with three working groups and ministerial-level oversight (Section 4.2). Its post-disruption operational activity, financial commitment and framework advancement are set out in Section 4.2 and Table 2. The separate FTA track is not attributed to the TTC.

Energy had the CECP, first established in 2016 and now in its third phase (adopted November 2024). The CECP provides a government-to-government framework overseen through the India-EU Energy Panel, which brings together officials of the relevant Indian ministries

and the Commission's Directorate-General for Energy and was co-chaired, at its December 2021 session, by the MEA's Secretary (West) and the Commission's Deputy Director-General for Energy (MEA 2021). No dedicated CECP fund is identified. Indian government-level financial commitment to the energy partnership has not been established in the sources examined. Based on publicly available sources, Indian engagement has been identified primarily at the industry association level, without a central government-level financial commitment equivalent to EU institutional investment. Whether this reflects a structural gap or a measurement limitation requires further research.

Transport had no comparable framework (Section 4.1). The MoU provided for coordinating entities and an action plan, but none is documented before the disruption, and the planned sixty-day meeting did not take place (Alhasan and Solanki 2023). Operational activity consisted of continued political declarations, with steering-committee discussions reported but no documented decisions (Pratap 2026); no bilateral EU-India allocation or framework advancement is identified in the post-October 2023 period. The result is the declaratory persistence documented in Section 3.

This explanation does not require an assumption of deliberate adaptive strategy by either partner. The pattern is consistent with the proposition that pre-existing institutional arrangements shaped the capacity of different sectors to sustain cooperation after the disruption. The comparison cannot, however, establish that institutionalisation depth operated independently of other sector-specific conditions, such as third-party dependence.

A limitation follows from the case structure. Transport differs from digital and energy in two respects at once: it lacked a pre-existing bilateral framework, and its design depended on third-party transit states. Because both conditions co-occur in a single case, the comparison cannot separate the effect of institutional absence from the effect of external dependence. The evidence is consistent with institutionalisation depth as an explanation, but it does not rule out that third-party dependence alone accounts for the transport paralysis. Separating the two would require cases with similar external dependence but different institutional depth. IMEC was also launched only weeks before the disruption, so its low institutional score reflects both design and timing.

5.1 Comparison with BRI Sectoral Variation: A Hypothesis

China's BRI faces an analogous pattern of sectoral variation. Physical infrastructure corridors in conflict-affected geographies, notably the China-Pakistan Economic Corridor (CPEC) and BRI segments passing through unstable Central Asian and African contexts, have experienced disruptions analogous to IMEC's western corridor paralysis (Hillman 2018; Small 2015). By contrast, the digital silk road and bilateral currency swap arrangements appear to have proven more resilient, partly because they operate on bilateral state-to-state logic that does not require third-party territorial permissiveness.

However, the mechanism differs importantly. BRI's resilience in physical infrastructure, where it exists, appears to derive less from institutional depth in the EU-India sense than from capital depth: bilateral state-to-state contracts, often backed by Chinese state financing, that create political and economic incentives for host states to maintain project continuity (Hillman 2018). This capital depth can partly substitute for the territorial permissiveness problem that paralyses IMEC. EU-India financing, by contrast, is liability-capped: bounded in amount and scope and project-specific, in the form of loans (EIB), grants (Global Gateway) and research budgets (Horizon Europe), as documented in Section 4.3. Such financing generates no comparable leverage over third states.

This comparison suggests a hypothesis for future research: the stratified resilience argument holds specifically for partnerships where flagship corridors depend on third-party territorial permissiveness and where capital commitments are liability-capped rather than open-ended. This includes EU-India and potentially Japan-India connectivity initiatives, but not the capital-depth contracts often found in BRI, where funding leverage may substitute for territorial permissiveness. Testing this generalisation across cases represents a productive agenda for future research.

6. Implications

6.1 For EU-India Partnership Strategy

The stratified resilience finding has a counterintuitive implication for EU-India partnership strategy: the partnership's most durable architecture is its least visible. The TTC, the CECP, and the FTA digital chapter are advancing quietly while IMEC dominates political communications on both sides. This inversion, institutional depth where visibility is low and institutional shallowness where visibility is

highest, is the partnership's central strategic vulnerability. If the partnership seeks to deepen its geoeconomic resilience, greater investment in existing bilateral frameworks would generate more durable capacity than new corridor announcements.

Concrete steps could include: upgrading the TTC ministerial meetings to a standing annual mechanism with dedicated working group resources and permanent secretariat support; establishing a CECP capital parity arrangement that encourages Indian government-level financial commitment equivalent to EU institutional investment through the EIB and Global Gateway; and building robust FTA implementation mechanisms for the digital chapter, including a dedicated EU-India Digital Trade Committee with dispute resolution capacity. Each of these steps targets the institutionalisation depth deficit in a different sector: the first consolidates the digital track's existing strength; the second addresses the energy track's documented asymmetry; the third converts the digital chapter from a negotiated text into an operational institution.

IMEC's operationalisation depends on conditions outside EU-India bilateral control: Gaza conflict resolution, Saudi-Israeli normalisation, and sanctions clarity on Iranian alternative corridors. The stratified resilience finding suggests that waiting for geopolitical permissiveness to restore transport corridors may reflect a fundamental misunderstanding of where EU-India geoeconomic durability actually resides.

6.2 For Geoeconomic Theory

Stratified resilience adds analytical precision to a geoeconomic statecraft literature that has tended to treat connectivity strategies as unified rather than sectorally disaggregated. Existing frameworks (Wigell 2016; Blackwill and Harris 2016; Farrell and Newman 2019) theorise the conditions under which states deploy economic instruments but say relatively little about the conditions under which those deployments sustain themselves across geopolitical disruption. This paper addresses that gap by proposing institutionalisation depth as an explanation for within-partnership variation in cooperation persistence. Stratified resilience names the pattern to be explained; institutionalisation depth is the proposed explanation.

This has implications for how scholars assess geoeconomic strategy effectiveness: a strategy that generates high announcement capacity but low implementation capacity may appear robust in political communications while remaining structurally fragile under disruption. The EU integration scholarship's insight that functional cooperation precedes political commitment (Haas 1958; Lindberg 1963) finds an echo in the geoeconomic domain: institutional density accumulated through iterative negotiation proves more resilient than grand political announcements under conditions of geopolitical turbulence. Keohane (1984) argues that institutions can sustain cooperation after the conditions that created it change, by lowering transaction costs and providing information; Pierson (2000) shows how earlier institutional choices become self-reinforcing and costly to reverse. Both are consistent with the proposition that accumulated frameworks carry cooperation through disruption, although this paper tests that proposition in one partnership only.

The concept may generalise beyond EU-India. Middle-power connectivity partnerships that depend on third-party territorial permissiveness and liability-capped capital commitments are likely to exhibit analogous patterns of stratified resilience under geopolitical disruption. The distinction between BRI's capital-depth resilience and EU-India's institutionalisation-depth resilience tentatively suggests a broader theoretical proposition: the mechanism sustaining connectivity cooperation under disruption differs systematically between great-power and middle-power geoeconomic strategies. Great powers with open-ended capital commitments can substitute capital depth for territorial permissiveness; middle-power partnerships are less able to, and are therefore more reliant on institutionalisation depth as the alternative resilience mechanism. Testing this proposition across cases such as Japan-India connectivity initiatives or ASEAN-EU partnerships represents a productive agenda for future research.

7. Conclusion

This paper has argued that the uneven persistence of EU-India cooperation across sectors, which it terms stratified resilience, is explained by the depth of pre-existing bilateral institutional frameworks. The empirical evidence across three sectors from October 2023 to July 2026 supports this argument.

Transport cooperation, centred on IMEC, demonstrates declaratory persistence without operational recovery. No standing bilateral EU-India framework exists. The coordinating entities and action plan the MoU envisaged are not documented before the disruption, and the sixty-day meeting did not take place within that period (Alhasan and Solanki 2023). Transport is the null case. Digital cooperation, anchored in the TTC, demonstrates genuine bilateral resilience, evidenced by the TTC’s own continuity from November 2023 to July 2026. The separate FTA track provides parallel, separately attributed evidence. Digital is the positive case. Energy cooperation, advanced through CECP Phase III and accompanied by concurrent EU-side financing, demonstrates active but asymmetric resilience.

EU institutional depth is documented at a level not matched by equivalent Indian central government-level documentation in the sources examined. Energy is the intermediate case.

The theoretical contribution is twofold. First, the paper proposes institutionalisation depth as an explanation for why cooperation persists unevenly across sectors under geopolitical stress. Second, it names the resulting pattern stratified resilience and distinguishes announcement capacity from implementation capacity, identifying declaratory persistence as the outcome where the latter is absent. IMEC's declaratory persistence is not evidence of EU-India geoeconomic resilience. It is a measure of the cost of institutional shallowness in an era where geopolitical permissiveness can no longer be assumed.

Scope conditions: the argument holds for partnerships where flagship corridors depend on third-party territorial permissiveness and where capital commitments are liability-capped (bounded and project-specific, as defined in Section 5.1) rather than open-ended. It does not generalise to great-power connectivity strategies with bilateral capital depth and state-to-state contractual enforcement leverage.

Declarations

Author Contribution

M.B.R. conceived the study, developed the theoretical framework, conducted the research, and wrote the manuscript in its entirety.

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The present manuscript is an independently developed work.

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Footnotes

1. Schimmelfennig (2001) uses "rhetorical entrapment" for situations in which actors who have publicly committed to norms are pressed by others to follow through, even against their preferences, in the context of EU eastern enlargement. Declaratory persistence, as used here, runs in the opposite direction: public commitment language continues without operational follow-through, because the political cost of acknowledging failure exceeds the reputational cost of sustained ambiguity. The two concepts share the idea that public commitments raise the cost of retreat, but differ in outcome, so this paper uses a separate term.