

# India-Sweden Defence Industry Cooperation

**Capitalizing Opportunities for  
Growth and Security**

Knowledge provider

The EY logo consists of the letters 'EY' in a bold, white, sans-serif font. A yellow diagonal bar is positioned behind the 'Y'.

Building a better  
working world

The SIDM logo features the acronym 'SIDM' in a large, white, serif font. Below it, the full name 'SOCIETY OF INDIAN DEFENCE MANUFACTURERS' is written in a smaller, white, sans-serif font on a yellow rectangular background.

Confederation of Indian Industry

An aerial photograph of a rocky coastline. The foreground is dominated by a dense field of grey, angular rocks of various sizes. To the right, the ocean is a deep teal color, with white foam from waves crashing against the rocks. The overall scene is rugged and natural.

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# Introduction

India and Sweden share a strong historic relationship, with the first diplomatic ties being established in 1949. The Swedish Prime Minister, Stefan Löfven, visited India in February 2016 for the Make in India Week in Mumbai, which became one of the most important bilateral visits in the recent past. The Joint Statement issued after the meeting included defence as one of the sectors for further cooperation.

In 2009, the two countries signed a Memorandum of Understanding (MoU) for Defence Cooperation. The Joint Working group established under it meets regularly. In October 2015, Sweden's State Secretary in the Prime Minister's Office, Mr. Hans Dahlgren, visited India for the first round of Strategic Dialogue with the Indian National Security Advisor. The General Security Agreement signed in 2019 on the exchange and mutual protection of classified information enables a comprehensive partnership.

Sweden and India are also working together on India's Venus orbiter mission, Shukrayaan. In November 2020, the Ambassador of Sweden to India, Klas Molin said Swedish Institute of Space Physics (IRF) is engaged in the venture, its second collaborative project with ISRO. IRF's satellite instrument Venusian Neutrals Analyzer (VNA) will study how the charged particles from the sun interact with the atmosphere and exosphere of the planet.

The following table presents India's total trade (in US\$ bn)<sup>1</sup> with Sweden from 2016-17 to 2019-20.

	2016-17	2017-18	2018-19	2019-20
<b>Exports</b>	0.71	0.77	0.79	0.75
<b>Imports</b>	1.16	1.46	1.33	1.11
<b>Total</b>	<b>1.87</b>	<b>2.23</b>	<b>2.12</b>	<b>1.86</b>

<sup>1</sup>The President of India visited Sweden in 2015. During this visit, both the nations agreed to achieve a target of US\$5 billion by 2018. However, the bilateral trade fell to US\$1.9 billion in 2016-17 from ~US\$2.17 billion in 2015-16. Simultaneously, Swedish investments and other economic activities in India increased. Indian exports to Sweden mainly included articles of apparel, clothing accessories, textiles yarn, fabrics, manufactures of metals; road vehicles; general industrial machinery and equipment. Indian imports from Sweden were pulp and wastepaper; road vehicles; paper and paper board and articles thereof;

general industrial machinery and equipment; iron and steel; machinery for particular industries; electrical machines, apparatus and appliances; miscellaneous manufactured articles; and machinery and equipment for power generation.

Most recently, the India-Sweden Virtual Summit was held in March 2021. Defence and security were areas of longstanding collaboration with scope for increased activities. Prime Minister Modi invited Swedish defence firms to Make in India, especially in the two Defence Production Corridors in Tamil Nadu and Uttar Pradesh.

The Government of India (GoI) aims to become a US\$5 trillion economy by 2025<sup>2</sup> and indigenous defence production is key to achieving this target. The draft Defence Production and Export Promotion Policy (DPEPP) 2020 has set the target of turnover of INR 1,75,000 Crores (US\$25 billion) including export of INR 35,000 Crore (US\$5 billion) in aerospace and defence goods and services by 2025.



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<https://www.thehindu.com/business/Economy/india-ushering-in-rapid-structural-reforms-to-become-5-trillion-economy-by-2025-goyal/article33535817.ece#:~:text=India%20is%20strengthening%20the%20entire,Goyal%20said%20on%20January%209.>



# Global defence trade

According to the Stockholm International Peace Research Institute<sup>3</sup>, total global military expenditure was US\$1,981 billion in 2020. This is an increase of 2.6% in real terms from 2019. This increase happened when the global GDP reduced by 4.4% mainly due to the ongoing pandemic. The top five spenders were the US, China, India, Russia and the UK. They together accounted for 62% of global military expenditure. At the same time, many countries reduced their military spending to respond to the pandemic. Some of them are Russia, Brazil, Chile and South Korea. Military spending across Europe rose by 4% in 2020. Besides China, India (US\$72.9 billion), Japan (US\$49.1 billion), South Korea (US\$45.7 billion) and Australia (US\$27.5 billion) were the largest military spenders in the Asia and Oceania region.

In the last five years (2016-20), the US was the largest exporter for military equipment. The global share of exports by the US rose from 32% in 2011-15 to 37% in 2016-20. After the US, top exporters during this time were Russia, France, Germany and China. Top importers were Saudi Arabia, India, Egypt, Australia and China.

Between 2011-15 and 2016-20, India's arms imports fell by 33%, affecting Russia the most. India's imports from the US fell by 46%. During 2016-20, India's top three arms suppliers were Russia accounting for 49% of India's imports followed by France (18%) and Israel (13%). India accounted for 0.2% of the share of global arms exports during 2016-20 and was the world's 24th largest exporter of major arms. This was a 228% increase over India's export share of 0.1 % during the previous five-year period of 2011-15. Top three countries to which India exported defence equipment were Myanmar, Sri Lanka and Mauritius.

China was the fifth largest arms exporter in 2016-20. Its exports fell by 7.8% between 2011-15 and 2016-20. China accounted for 74% of Pakistan's military imports during the last five years, up from 61% in 2011-15.

## Swedish defence trade

Sweden was the 15th largest arms exporter in 2016-20. Top three recipients were the US with 25% share of total exports followed by Pakistan (11%) and Algeria (11%).

The following table<sup>4</sup> presents Sweden's imports (US\$ million) in last 10 years.

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Total
Finland				14	22							36
France		28		7	21	9	13	9	7	7		101
Germany		8	8				44	29				88
Norway	5			2	1	3	5	4			3	22
South Africa			8	17								25
United Kingdom	6	6	6									18
United States		150	185	16	1	2	9	5				368
<b>Total</b>	<b>11</b>	<b>191</b>	<b>207</b>	<b>56</b>	<b>45</b>	<b>14</b>	<b>70</b>	<b>46</b>	<b>7</b>	<b>7</b>	<b>3</b>	<b>657</b>

Sweden does a considerable amount of defence trade with the world and there are multiple opportunities for industries of both sides to explore. In the recent past, there have been many initiatives by both, the Indian and Swedish governments, to promote international trade and promote FDI.

In India, capital acquisition is governed by the Defence Acquisition Procedure (DAP) under the following categories:

- ▶ Buy (IDDM)
- ▶ Buy and Make(Indian)
- ▶ Buy and Make
- ▶ Buy Global (manufacture in India)
- ▶ Buy Global

In addition to the above, the DAP 2020 introduces new categories of procurement, such as Leasing and Make - III. Further, Indian MOD has also introduced the Innovations for Defence Excellence (iDEX) challenges for promoting startups and Draft Defence Production and Export Promotion Policy (DPEPP 2020) for motivating the industry to export.

## Indian defence trade

India's defence imports for the last 10 years<sup>5</sup> (in US\$ million) are below.

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Total
Australia	17	17										33
Brazil								10		10		21
Canada				15	13	90						118
France	24	27	32	59	62	123	117	411	192	712	1013	2771
Germany	50	34	9	20	28	59	40	33	5	71	74	423
Israel	113	158	163	119	157	377	736	688	108	133	107	2858
Italy	12	306	12	6	11	6	3	3			3	360
Kyrgyzstan						4	5	5				14
Netherlands	20	1	1		10	10	10					51
Poland				11								11
Russia	2294	2483	3798	3853	1719	1961	1887	1411	1102	1182	969	22658
South Africa		4	31	31				11	11	16	15	119
South Korea									26	190	216	432
Switzerland				38	31	25						94
Ukraine		17	48	106	48	48	34	14	14			329
United Kingdom	120	140	160	140	150	150	130	71	4	13	10	1088
United States	53	202	139	984	1119	265	42	252	23	748	392	4219
Uzbekistan	209	209										418
<b>Total</b>	<b>2911</b>	<b>3598</b>	<b>4392</b>	<b>5381</b>	<b>3347</b>	<b>3117</b>	<b>3003</b>	<b>2909</b>	<b>1485</b>	<b>3075</b>	<b>2799</b>	<b>36016</b>

Major products imported/being imported include the 36 Rafale fighter aircraft from France, the S-400 Triumf Air Defence System from Russia, Sig Sauer rifles from the US, etc.

India's defence exports have witnessed a sharp increase over the last three years. Exports have risen from ~INR 1,500 crore in 2016-17 to INR 8,434 crores in 2018-19<sup>6</sup>. Primary growth drivers are the recent policy liberalization and reforms that government has carried out in making the entry into the defence (sector) simpler for private companies.

The Government of India continues to take initiatives to enhance defence exports. On 25 October 2019, Defence Minister Rajnath Singh approved the issuance of two open general export licenses (OGELs) for export of certain defence parts and components intra-company transfer of technology to select countries to give a boost to India's defence exports. The countries allowed under the OGELs are Belgium, France, Germany, Japan, South Africa, Spain, Sweden, the UK, the USA, Canada, Italy, Poland and Mexico. Export of items to a Special Economic Zone is not permitted. The items permitted under OGEL include components of ammunition and fuse setting device without energetic and explosive material, firing control and related alerting and warning equipment and related system. Besides this, body protective items, complete aircraft or complete unmanned aerial vehicles (UAVs) and any components specially designed or modified for UAVs are excluded under this license. The Department of Defence Production (DPP), on a case-to-case basis, may consider the application for grant of OGEL. The transfer of technology to the countries is subject to the condition that the export is an intra-company transfer from an Indian subsidiary (applicant exporter) to its foreign parent company and/or to subsidiaries of the foreign parent company. The OGEL is a onetime export license to be

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granted to a company for a specific period (two years initially). In order to acquire the licenses, the applicant is mandatory to have an import-export certificate. The quarterly and end of the year reports on all the transactions done under OGELs should be submitted to DPP for examination and post-export verification.

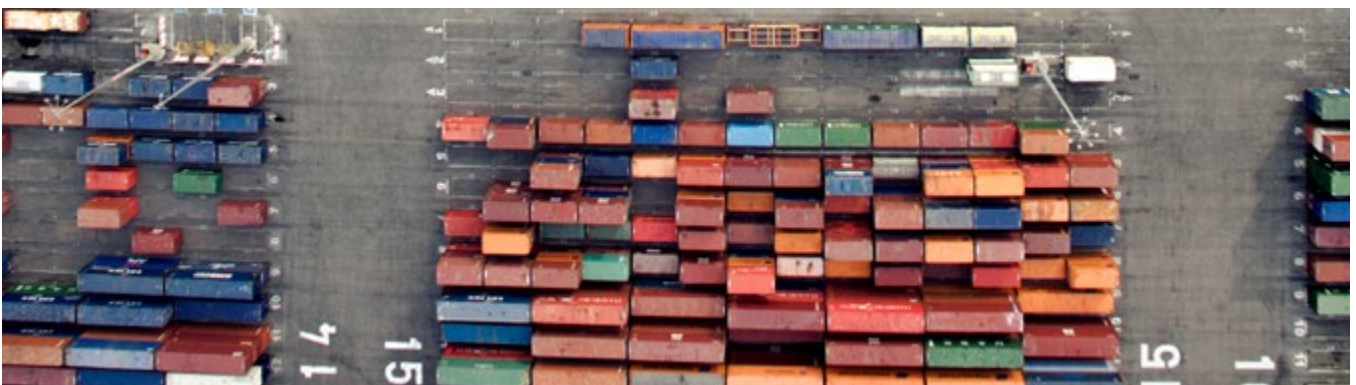
India's diverse geographical conditions viz. deserts, coastal line, mountain ranges and semi-arid regions has allowed mindful development of specific equipment that caters to these unique conditions. Some of the indigenous equipment that may have significant export potential are:

- ▶ BrahMos Missile System
- ▶ Pinaka Multi-Barrel Rocket Launch Systems
- ▶ Akash Air Defence Systems
- ▶ Tejas Fighter Aircraft
- ▶ Helicopters (Dhruv and Rudra)
- ▶ ASW corvettes
- ▶ Advanced OPVs
- ▶ Patrol boats, interceptor boats
- ▶ Torpedoes, sonars, buoys
- ▶ Radars
- ▶ Artillery guns
- ▶ Anti-tank missiles
- ▶ Mine protected vehicles

The DRDO has published an export booklet<sup>7</sup> listing land, naval, air and communication systems and sub-systems (comprehensive list provided as appendix A to this paper) along with the manufacturing company and respective NSN code.

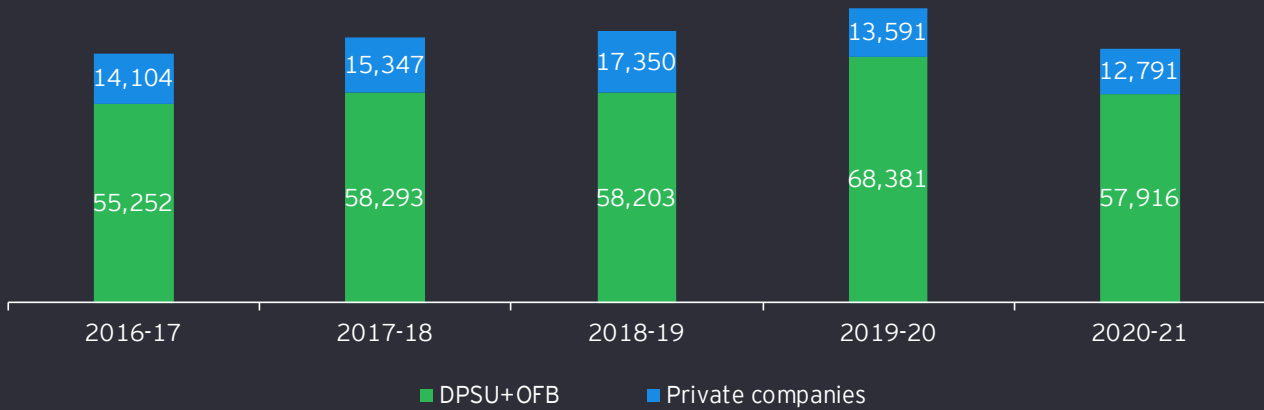
Indian defence exports for the last 10 years (in US\$ million) are tabulated below:

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Total
Afghanistan						12	3					15
Maldives	5			5							3	12
Mauritius					24		23	19				66
Mozambique										15		15
Myanmar				6		27	12			3	148	196
Namibia		1			2							3
Nepal		3			5							7
Seychelles				4	6		8		7			24
Sri Lanka								37	37			74
Suriname						3						3
<b>Total</b>	<b>5</b>	<b>3</b>		<b>15</b>	<b>36</b>	<b>42</b>	<b>46</b>	<b>56</b>	<b>44</b>	<b>18</b>	<b>151</b>	<b>415</b>



# Overview of the Indian defence manufacturing ecosystem

Indian defence procurements are largely budget driven. For FY 2021-22, India's defence budget is INR 4,78,196 crore. As of 31 March 2021, for FY 2020-21, Indian defence production was INR 75,807 crore. The contribution of Defence Public Sector Unit and Private industry is INR 57,916 crore and INR 12,791 crore respectively. As illustrated in the chart below, defence production increased by ~ INR 10,000 crore from 2016-17 to 2019-20. However, it was adversely affected in 2020-21 due to the pandemic.



India's defence manufacturing ecosystem comprises of 41 Ordnance Factories under the Ordnance Factory Board, 9 DPSUs, 51 laboratories of the DRDO and private industry.

DRDO is the research and development (R&D) wing of the Ministry of Defence, Government of India. It has a network of 51 R&D laboratories across India involved in seven technology clusters including naval systems and materials, aeronautical systems, armament and combat engineering systems, missile and strategic systems, electronics and communications systems, life sciences, micro electronic devices, computational systems and cyber systems. For several projects, the DRDO works in collaborations with different Indian Institute of Technology (IITs) and Indian Institute of Science (IISCs). It also carries out transfer of technology to private industry. The DRDO boasts of 460 active and granted patents to industry. With 7,000+ scientists contributing to technological milestones, the DRDO continues to play a critical role in creating national defence capabilities.

The Ordnance Factories (OFs) are a conglomerate of 41 factories under the aegis of its corporate headquarters OFB in Kolkata under the Department of Defence Production of the Ministry of Defence. The 41 OFs are at 24 different locations in India with 10 in Maharashtra, 9 in Uttar Pradesh, 6 in Tamil Nadu, 6 in Madhya Pradesh, 4 in West Bengal, 2 in Uttaranchal and 1 each in Telangana, Chandigarh, Bihar and Orissa. The first ordnance factory was established in Cossipore, Kolkata on 18 March 1801. This factory is now known as the "Gun and Shell Factory". The OFB was established on 2 April 1979. A lot of R&D undertaken by OFs is in collaboration with DRDO and educational institutions like IITs. For instance, the OFB has entered into an agreement with IIT Madras to develop the Centre of Excellence for Ammunition at the institute that will power the development of futuristic ammunition such as precision guided ammunition. The OFB has also signed an MoU with the Council of Scientific & Industrial Research (CSIR) for advanced research.

India's private sector is one of the most vibrant entrants in the defence industrial complex and has significantly changed the face of the industry. The sensitive and strategic nature of the industry, its direct impact on national security and foreign policy interests of the nation were oft cited to restrict the entry of private sector in defence earlier. Today, the private sector is an integral part of the defence industry. It has a relatively short history of operations in defence but has gained a lot of pace in this period.

**WAY FORWARD:**

# Catalysts for India-Sweden defence cooperation under Atmanirbhar Bharat Yojana

Under the Atmanirbhar Bharat Yojana, the GoI India has increased the FDI limit upto 74% under the automatic route thereby motivating foreign original equipment manufacturers (OEMs) to invest in India and collaborate with the local industry.

In order to increase sourcing from indigenous manufacturers, GoI has released three lists. The first list of 101 items with an import embargo against the timelines for each of them was issued last year. This was followed by a list of 108 items by DRDO to be designed, developed and manufactured by Indian Industry only. On 31 May 2021, a second 'positive list for indigenization' of 108 items was unveiled by MoD in continuation to the 101 list. Approximately 63% (~INR 70,000 crore) of the current defence budget has been allocated for indigenous procurement. These lists pave way for more Swedish-Indian partnerships for Make in India and participating in all programs under various categories of the Defence Acquisition Procedure (DAP) 2020. Such partnership model shall also lead to increased participation of Indian vendors in global supply chain through impetus on indigenization.

DAP 2020 has identified aeroengines and FAB as projects of national importance. It has also emphasized on the need of indigenous military materials and software as important facets of self-reliance. These policy reforms present a significant opportunity to FOEMs. Through joint research and requisite ToT, these projects can lay a strong foundation for the long term.

The Strategic Partnership Model under DAP-2020 offers a huge potential for Indian-Swedish defence cooperation. Saab has offered the Gripen fighter aircraft for the Indian Air Force's requirement of 114 Multi-Role Fighter Aircraft. It has proposed to develop and assemble the first 18 aircraft in Sweden and the remaining 96 to be made in India.

The Defence Offset Guidelines offer a higher multiplier to FOEMs to source from MSMEs in India. Investment in Defence Industrial Corridors (DIC) is also encouraged through a higher multiplier.

The GoI has issued the framework and procedure for design, development and production of military air systems and airborne stores (DDPMAS). This document shall govern all design, development, production and other activities related to military aviation. Such a readily available framework eases export of systems to foreign nations. It allows makes it easier for FOEMs to source from Indian players.



## Appendix A

NSN codes from Defence export booklet

System type	Product	Manufacturing company	NSN
Land systems	Akash weapon system	BDL	1420720471555
	BrahMos weapon system	BrahMos Aerospace	1410720487334
	Milan-2T ATGM	BDL	1425720487376
	Dhanush gun	OFB	1025720471000
	Advanced towed artillery gun system (ATAGS)	Bharat Forge	1025720487409
	K-9 Vajra gun system	L&T	2350720487383
	Bharat 52 gun system	Bharat Forge	1025720487410
	Upgraded L-70 gun	BEL	1010720463678
	Garuda 105 light weight field gun	Bharat Forge	1015720487330
	ZU 23 upgrade	L&T	1005720487384
	Upgraded Schilka weapon system	BEL	2350720464145
	Wheeled Amphibious Platform (WHaP) 8x8	Tata Motors	2355720487370
	Weapon locating radar	BEL	1285720461381
	Battle field surveillance radar - Extended Range (BFS R-XR)		5840720487324
	3D low level light weight radar (ASLESHA)	BEL	5840720472437
	Military vehicles	Ashok Leyland	2310 720 466 073 NSN
	Mine Protecting Vehicle	OFB	2355720487367
	Pinaka Multi Barrel Rocket Launcher	L&T	1055720251323
	Sarvatra Bridge System	BEML	5420720473569
	Pontoon Bridge System	BEML	1945720487038
	Communication Integrated Electronic Warfare System	BEL	5865720487320
	Ground Based Mobile ELINT System (GBMES)	BEL	6350720487301
	155 mm He ERFB BT	OFB	1320720487363
	INSTAVEST G6	MKU	8470720487368
	Advanced combat helmets	MKU	8415720487365
	Ballistic shields	MKU	4240720487364
	Ballistic protection	SM CARAPACE ARMOR	8470720487473 / 8470720487474
	High Energy Materials and multi mode hand grenade	SOLAR INDUSTRIES INDIA	1330720487346
	Konkurs-M ATGM	BDL	NA
	Counter Measuring Dispensing System (CMDS)	BDL	1520720471805
	Hand held/ held mounted NVDS (Model - NETHRA)	ALPHA DESIGN TECHNOLOGIES	5855720487349

System type	Product	Manufacturing company	NSN
Naval systems	Anti submarine warfare corvette	GRSE	5865720487372
	Offshore Patrol Vessel (OPV)	HSL	1940720473210
	Advanced Offshore Patrol Vessels	GOA SHIPYARD	1940720472511
	Fast Patrol Vessels	GOA SHIPYARD	1940720472521
	High Speed Patrol Boat	GOA SHIPYARD	1940720472529
	Fast Interceptor Boats	GOA SHIPYARD	1940720472465
	Inshore Patrol Vessels (IPV)	HSL	1940720473227
	Landing Craft Utility	GRSE	1905720487373
	Voith Tug	HSL	1925720487327
	Torpedo Advanced Light (TAL)	BDL	1356720474117
	Heavy Weight Torpedo (Varunastra)	BDL	1045720487328
	Submarine Fired Decoy (SFD)	BDL	1080720487380
	CRN 91 Naval Gun	OFB	1005720487371
	Kavach MOD-II Chaff Rocket Launcher	OFB	1055720487366
	ASW Rocket Launcher	L&T	1055720487387
	Torpedo Launchers	L&T	1045720487328
	WM-18 Rocket Launcher (Beach Clearing Systems)	L&T	1055720487385
	53000 DWT Bulker	HSL	1915720473237
	Floating Dock	L&T	1925720487345
	Air systems	Advanced Composite Communication System (CCS MK IV)	BEL
Coastal Surveillance System		BEL	5840720487276
Combat Management System		BEL	1230720487277
Electro Optical Fire Control System- Upgrade 2 (EOFCS - U2)		BEL	1260720487322
LCA Tejas		HAL	1510720472325
Light Combat Helicopter (LCH)		HAL	1520720471805
Advanced Light Helicopter (ALH) - Dhruv		HAL	1520720351481/1520720351482
Cheetal		HAL	1520720471809
Dornier (DO-228)		HAL	1510720471790
Brake Parachute for SU-30 A/C		OFB	1670720464895
Communication systems	Secure VHF Handheld Radio LVP 341	BEL	5820720487278
	Secure UHF Handheld Radio LUP 291	BEL	5820720276701
	Software Defined Handheld Radio	BEL	5820720487279
	HF Trransceiver LHP 265	BEL	5820720487300
	VHF FF Transceiver LVP 346	BEL	5820720487340
	CB/LB Field Telephone PTR 1000+	ALPHA DESIGN TECHNOLOGIES	5805720487323
	Software Defined Radio (SDR)	ALPHA DESIGN TECHNOLOGIES	5820720487279

System type	Product	Manufacturing company	NSN
	Weapon Sights for Target Observation and Aiming	ALPHA DESIGN TECHNOLOGIES	1240720487325
	Multiband Cellular and BWA Jammer	ALPHA DESIGN TECHNOLOGIES	5865720487369
	VHF Base Station LVM 342	BEL	5820720487343
	V/UHF AM/FM Transceiver LUP329	BEL	5820720487331
	Software Defined Radio Manpack (SDR)	BEL	NA
<b>Other systems</b>	Combat Training Centre (CTC)	ZEN TECHNOLOGIES	6920720487448
	Titanium Alloys	MIDHANI	9630720487326
	Special Purpose Steels	MIDHANI	9640720487472
	Non-pressure Bearing Parts of Small Arms	INDO-MIM	NA
	Airframe Structure & Engineered Products	DYNAMATIC TECHNOLOGIES	1560720487329



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# SIDM

SOCIETY OF INDIAN DEFENCE MANUFACTURERS

Since 2017, the Society of Indian Defence Manufacturers (SIDM) has grown and established itself as India's apex Defence Industry association and, today plays a proactive role as an advocate, catalyst, and facilitator for the growth and capability building of the defence industry in India.

The Society represents the entire spectrum of Defence and Aerospace manufacturers in India covering both the Public and the Private Sector. Its membership constitutes Large companies, MSMEs, FOEMs, Academic Institutions and Think Tanks which are spread across all states and regions of the country.

SIDM stands as the 'Voice of the Industry' and works closely with the Government to shape a conducive policy environment for the growth of the defence Industry in India. Through its MoUs with the Army, the Air Force and the Navy, SIDM provides a platform for interface with the Services and enables the Industry to serve the emerging requirement of the forces.

SIDM acts as a facilitator between the Defence Research & Development Organisation (DRDO), academic Institutions, innovators and the user to create a strong foundation for nurturing new-age defence technologies. To build capacity and capability of the Indian Industry, SIDM provides technical support through subject-matter experts and conducts workshops, short courses on procedures and regulatory affairs, such as its flagship Defence Acquisition Management Course (DAMC), in the Defence and Aerospace sector.

As India expands its global presence, SIDM has emerged as the single reference point for countries looking to engage with the Indian Industry and has organized numerous bilateral interactions to strengthen India's defence industrial ties.

SIDM is committed to make India Aatmanirbhar in Defence Production and is "Proud to Arm the Nation".

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