

6TH INTERNATIONAL CONGRESS
OF TUCOMEX - BRUSSELS

SPAIN 2030:

15 ENGINES THAT CONNECT
RESILIENCE, INNOVATION
AND EUROPEAN LEADERSHIP

Strengthening the voice of Spanish Industry and
Technology in EU Trade Policy





Bruselas
12-13 DE MARZO DE 2026



VI CONGRESO INTERNACIONAL DE COMERCIO EXTERIOR

08:30-09:00: WELCOME COFFEE

09:00-10:00:
INAUGURACIÓN

Inauguración del VI Congreso Internacional
de Comercio Exterior



Cristina Peña Andrés

General Manager

TuComex

INSTITUTIONAL REPRESENTATION



Peter Berz

Head of Unit (Directorate
General for Trade)

EUROPEAN COMMISSION

10:00-10:30
BLOQUE 1:

RESILIENCIA
ESTRATÉGICA

SECTOR: Agua, Clima y Resiliencia Hídrica



Carlos García Blázquez

General Manager

GENAQ

SECTOR: Energía Renovable y Transición Verde



Javier Bustos Ramos

CEO

GFM Fotovoltaica

10:30-11:00: COFFEE BREAK Y NETWORKING

11:00-12:00:
BLOQUE 2:

INDUSTRIA
ESTRATÉGICA,
MOVILIDAD,
LOGÍSTICA Y
TECNOLOGÍA

SECTOR: Industria Naval, Defensa Marítima y
Tecnologías del Mar



Javier López San Román

Responsable de Asuntos
Europeos

Navantia

SECTOR: Puertos, Infraestructuras
y Conectividad Global
SECTOR: Transporte y Logística



Antonio R. Búa Domínguez

Presidente
Propeller Club Puerto de Vigo

Delegado Galicia Sur
Asociación Española del Transporte

SECTOR: Robótica, Automatización y Deep Tech



Javier Martínez García

Fundador

Odyssey Robotics / Grupo Leviatán

SECTOR: Movilidad Sostenible y Automoción del
Futuro



Julian Herwig

Responsable de Relaciones
Internacionales & Asuntos Europeos

SEAT S. A.

12:00-12:30:
BLOQUE 3:

PROYECCIÓN
EXTERIOR

SECTOR: Internacionalización, Estrategia y
Diplomacia Económica



Cristina Peña Andrés

General Manager

TuComex

SECTOR: Satélites, defensa aeroespacial
y telecomunicaciones



**Pedro Antonio Ruiz
González**

R&D Director

INTEGRASYS Group

12:30-13:30: LUNCH

13:30-14:45:
BLOQUE 4:

VIDA Y CONSUMO

SECTOR: Industria Textil Técnica para Turismo
y Deporte 360 en Espacios Premium



Sergio A. Manzano

Executive Director

TODOAMEDIDA

SECTOR: Piedra Natural, Cerámica, Construcción
y Arquitectura



Alfonso Muñoz Candela

Business Development
Director

PORCELANOSA

SECTOR: Bioeconomía y agricultura sostenible



Sergio Aguilar Roig

General Manager

Biorizon Biotech

SECTOR: Biotecnología y salud natural
SECTOR: Moda y retail, lifestyle y lujo



Raquel Torres Blanco

Global Sales Manager
Hifas da Terra
Ex Sales Manager Florida & Miami
Desigual

SECTOR: Medios de Comunicación y Narrativa
Económica



14:45-15:30:
RESUMEN DE
PONENCIAS
Y LÍNEAS
MAESTRAS PARA
EL FORO

15:30-16:00: COFFEE BREAK Y NETWORKING

16:00-16:30:

FORO DE
DEBATE Y
CONCLUSIONES

Entrega de los Premios TuComex 2025



Profesional del Año en Comex

Organismo del Año en Comex

Una vida dedicada al Comex

PROGRAMA 13/03/2026 - COMISIÓN EUROPEA (EDIF. CHARLEMAGNE)

09:45-10:00: WELCOME + GROUP PHOTO

10:00-11:00:
SHAPING
EUROPE'S
FUTURE-THE
EUROPEAN
COMMISSION AT
WORK

Shaping Europe's Future
The European Commission at Work



Lourdes Alvarellos

Head of Unit (Fraud
Detection and Prevention)

EUROPEAN COMMISSION

11:00-11:15: BREAK

11:15-12:15:
THE EU'S TRADE
POLICY

The EU's Trade policy



Sofía Muñoz Albarrán

Director (Interinstitutional,
Outreach, Communications
and Resources)

EUROPEAN COMMISSION



EXECUTIVE FOREWORD

Spain 2030: A New Voice Emerges in Europe

The VI TuComex International Congress – Brussels 2026 has marked a turning point in the relationship between Spanish enterprises and the European Union. For the first time, 15 strategic sectors of the Spanish economy directly presented their vision to the European Commission, articulating a common perspective on the industrial, technological, and economic strategic autonomy that Europe requires by 2030.

This document encapsulates that vision. It is the synthesis of an intensive working day characterized by direct dialogue with DG Trade and an unprecedented multi-sectoral session. It represents the voice of Spanish business, speaking with clarity, rigor, and ambition.

The conclusions are unequivocal:

- Spain possesses a robust industry.
- Spain commands cutting-edge technology.
- Spain fosters exceptional talent.
- Spain maintains a clear vision.

What was missing was a channel—a bridge. A space where Spanish companies could engage with Europe as equals and where Spain could exert a powerful presence.

That space now exists. We have built it through TuComex. This Congress has demonstrated that when Spain speaks in Brussels from a position of expertise and through the strength of its own unity, Europe listens.

This executive foreword introduces a 100-page document that gathers the contributions of the 15 strategic drivers of the Spanish economy: their challenges, their proposals, and their vision for a more sovereign, competitive, and sustainable Europe.



SPAIN 2030: 15 Drivers Connecting Resilience, Innovation, and European Leadership

Strengthening the Voice of Spanish Industry and Technology in European Union Trade Policy

1. Introduction

Europe is at a decisive crossroads. Geopolitics, the green transition, accelerated digitalization, and the imperative to bolster strategic autonomy have transformed how the European Union designs its trade and industrial policies.

Within this context, Spain contributes unique capabilities that can strengthen the EU's competitiveness, resilience, and technological leadership.

The VI TuComex International Congress, held in Brussels on March 12th and 13th, 2026, brought together 15 strategic sectors of the Spanish economy for a direct dialogue with the European Commission's Directorate-General for Trade (DG Trade).

This document encapsulates the conclusions, priorities, and key messages that each sector intends to convey to the EU.

2. Congress Structure

The Congress was organized into five thematic blocks following the opening remarks by the European Commission:

Block 1 — Strategic Resilience: Water, energy, climate, sustainability, and critical resources.

Block 2 — Strategic Industry, Mobility, Logistics, and Technology: Shipbuilding and maritime defense, logistics and ports, transportation, robotics, automation, and sustainable mobility.

Block 3 — Global Outreach: Internationalization, economic diplomacy, satellites, aerospace defense, and telecommunications.

Block 4 — Life and Consumer Goods: Technical textiles, natural stone and ceramics, bioeconomy, biotechnology, fashion, and lifestyling.

Block 5 — Communication and Smart Manufacturing: Media and economic narrative.

3. Participation of the European Commission

KEYNOTE SPEAKER — Peter Berz, European Commission, DG Trade



"Europe requires stable agreements, strategic autonomy, and the effective implementation of the Single Market."

Peter Berz's unit within the European Commission oversees transparency and the implementation of trade agreements. The regions of the world with the highest growth potential lie outside the EU, and the internal market alone is no longer sufficient. Businesses frequently report anti-competitive practices; the world is changing at a pace that regulation cannot always match, and Europe must respond with a coherent, long-term strategy. The EU is built on stability, which is founded upon rules; however, these rules must serve businesses, and not the other way around.

The European strategy is defined as **"Open Strategic Autonomy"**: being autonomous without closing ourselves off to the world. To achieve this, the EU is working on trade agreements with Mercosur, India, Mexico, Indonesia, New Zealand, and soon the Philippines, Malaysia, South Korea, Japan, and Australia. With these in place, the EU would become the world's largest commercial economic area, boasting 24 active agreements. Although a Single Market exists today, real internal barriers continue to fragment it. Eliminating these is as crucial as opening foreign markets. Once the Mercosur agreement is ready, the EU will provisionally apply the trade component without waiting for full ratification—a clear signal of existing political will.

The other pivotal concept is **"Economic Security"**: reducing dependency on third countries for energy and critical raw materials. Norway represents a significant internal asset in energy, but we must go further. To this end, Peter Berz's unit focuses on three pillars: partnerships with other nations, securing the supply of energy and raw

materials, and the promotion of trade and the Single Market, ensuring that negotiated agreements are effectively utilized by businesses. Signing agreements is merely the first step. The second, and most challenging, is ensuring they reach the factory floor and the office. This is where TuComex and the companies present at this Congress play an irreplaceable role.

4. Methodology and Congress Development

Each speaker was allotted 15 minutes to present their sector's 2030 vision, current challenges, growth levers, the impact of geopolitics and European regulation, and internationalization opportunities. Their interventions constitute the core substance of this paper.

BLOCK 1: STRATEGIC RESILIENCE

SECTOR 1 — WATER, CLIMATE, AND WATER RESILIENCE

Keynote Speaker: GENAQ | Carlos García, CEO *Block 1: Strategic Resilience*



0. Reasons for selecting this sector

Water is not just another resource; it is *the* resource. Without water, there is no agriculture, no industry, and no habitable cities. Yet, Europe faces a disturbing paradox: we are a continent with advanced hydraulic infrastructure, but we suffer from increasing vulnerability to scarcity and climate irregularity, which threatens to rewrite the rules of the game in the coming decades.

This sector opens this paper because it is, quite literally, the foundation for everything else. It is futile to discuss the green transition, the bioeconomy, or resilient industry without first addressing the most fundamental question: will Europe have sufficient, safe, and accessible water by 2030?

Spain is the most arid country in Western Europe, with over 75% of its territory at risk of desertification. The prolonged droughts of recent years are no longer anomalies but the "new climate normal." Simultaneously, Spain has developed a world-class technological capacity in water management: desalination, water reuse, basin monitoring, and decentralized treatment. This expertise, born of necessity, is now a portable competitive advantage and a strategic contribution to European autonomy.

Global data reinforces this urgency: 40% of bottled water contains microplastics, 93% of the world's population lacks guaranteed access to high-quality drinking water, and 12 million tons of plastic are dumped into the oceans annually. These are not distant statistics; they are symptoms of a cracking global water system, and Europe is not immune to this fracture.

The time is now. The European Commission has recently published its first specific report on water risks within the framework of the Green Deal. The European Water Reuse Regulation entered into force in 2023. The climate adaptation agenda now

positions water security as a cross-cutting priority. Spain has much to contribute to this dialogue, and GENAQ stands as one of the most innovative voices to do so.

1. Who We Are and What We Represent

The Spanish water sector encompasses everything from large-scale infrastructure management firms to a growing ecosystem of startups specialized in treatment, smart monitoring, and water generation from non-conventional sources. Collectively, the sector generates over €8 billion annually, directly employs more than 60,000 people, and has developed significant export capabilities in the Middle East, North Africa, and Latin America.

Spain possesses the largest seawater desalination capacity in Europe and operates some of the most advanced water reuse systems in the world. Decades of hydraulic policy have cultivated institutional, technical, and engineering expertise that today represents a strategic asset for the EU as a whole.

GENAQ (Water Generation) is a Spanish company that has developed systems for generating water from atmospheric air. This is not science fiction: it is applied engineering, already operational, which enables the procurement of high-quality drinking water where there is no access to conventional networks or where climate change has depleted available resources. It operates in more than 40 countries, with installations in remote rural areas, islands, and industrial environments. Its systems function autonomously, with low energy consumption and high efficiency; in their renewable energy versions, they integrate with solar photovoltaics, achieving production capacities ranging from domestic use to industrial scale.

In this paper, GENAQ represents more than just a company. It is the symbol of a new generation of decentralized water solutions that move beyond the traditional logic of large-scale infrastructure. In a Europe that needs to build resilience from its territories and at a local scale, this approach is exactly what is required.

2. 2030 Sector Vision

By 2030, the European water sector must achieve a qualitative leap—not as an elective option, but as a survival imperative. IPCC climate projections are unequivocal: the Mediterranean basin will experience reduced precipitation, increased evapotranspiration, and a higher frequency of extreme droughts. It is estimated that between 1 and 3 million Europeans could face severe water scarcity if structural action is not taken.

In this scenario, Spain aspires to position itself as the European hub for resilient water technology, exporting not only infrastructure but also knowledge, technology, and governance. The sector envisions this 2030 horizon structured around five key pillars:

Pillars for 2030 of the European water sector



3. Current Challenges and Competitiveness Levers

Key Challenges:

The fragmentation of the internal market is the first and most urgent: more than 1,500 different operators in Spain, with very disparate capabilities, hinder investment in R&D and the adoption of new technologies. Adoption cycles are long and resistance to change is high.

Innovation financing remains insufficient. Developing water technology requires patient capital with long return horizons. Many startups in the sector die in the "valley of death" between the prototype and commercialization at scale.

Asymmetric international competition is another real brake: China, Israel, and the United States invest massively with explicit state support, competing in tenders with prices that the European private sector cannot match without similar backing.

Finally, the regulatory gap between innovation and regulations generates uncertainty: technologies such as atmospheric generation do not fit perfectly into

frameworks designed for conventional sources, complicating certifications and slowing adoption. This regulatory vacuum directly affects GENAQ, which operates with certified technology (ISO 9001, CE, WHO compliance) but without a specific European framework that recognizes and facilitates the scale of atmospheric generation.

The competitive levers:

Accumulated knowledge is the main one: decades of scarcity management have generated a water culture and engineering capacity unparalleled in Europe.

The technological convergence between water, energy, digitalization, and precision agriculture opens advantages that are difficult to replicate.

And the growing global demand—the global water technology market will grow at rates exceeding 7% annually until 2030—offers a real opportunity if the appropriate institutional framework is in place.

4. Regulatory, Customs, and Trade Framework

The European framework is evolving rapidly, representing both an opportunity and a source of complexity. **Regulation (EU) 2020/741 on water reuse**, applicable since 2023, establishes harmonized minimum requirements, but its implementation varies among Member States, creating asymmetries that complicate business planning.

The Water Framework Directive is under review, with debates on the feasibility of ecological targets and the integration of climate adaptation. Businesses require long-term regulatory certainty to plan investments.

In **trade agreements**, the exporting sector encounters significant barriers: in the Middle East, tenders favor suppliers with government backing; in Africa, the absence of solid investment agreements generates risks that discourage the internationalization of SMEs.

In **technical standardization**, the lack of European standards for technologies such as atmospheric generation creates certification problems that act as de facto barriers. Furthermore, although the **water footprint** as a criterion in public procurement and sustainable reporting (CSRD) opens opportunities, it imposes measurement costs that weigh disproportionately on SMEs.

5. Proposals to the European Commission

Proposal 1. Create a European standard for water from non-conventional sources. Atmospheric generation, decentralized desalination, and other emerging technologies need a specific regulatory framework. The Commission must lead a technical standardization process —with CEN/CENELEC— to provide legal certainty and facilitate access to the Single Market and export markets.

Proposal 2. Include water technology as a strategic sector in European autonomy financing mechanisms. Much like semiconductors or batteries, water deserves strategic treatment in the EIB, Horizon Europe, and InvestEU: specific lines, guarantees for SME exporters, and preferential access to debt instruments for water-impact projects.

Proposal 3. Promote trade agreements with water cooperation clauses with the Global South. Agreements with the Mediterranean, Africa, and Latin America must include water technology cooperation chapters: open tenders for European companies, protected investment frameworks, and concessional financing. Spain must lead this negotiation from within the EU.

Proposal 4. Establish innovative public procurement at a European scale for water technology. Pre-Commercial Procurement programs specifically oriented toward water resilience would allow companies like GENAQ to grow with European public references that facilitate their subsequent internationalization.

Proposal 5. Create a European Water Risk Observatory. An early warning system with real-time data, integration of national monitoring systems, and the capacity to activate water solidarity mechanisms would be a key tool for the EU's collective resilience.

6. Final Message

Water is not just a human right. It is the invisible infrastructure upon which the entire European economy rests. Every industry that produces, every field that feeds, and every city that functions depends on the water cycle remaining reliable and secure.

Spain has learned to manage water scarcity out of necessity. It has turned that necessity into knowledge, and that knowledge into technology. Companies like GENAQ demonstrate that it is possible to generate water where there is none, with clean, modular, and accessible technologies, in any corner of the planet.

If Europe truly wants to be resilient, it needs to treat water for what it is: a primary strategic asset. And Spain is ready to lead this agenda.

The question is not whether there will be a water crisis in Europe. The question is whether we will be prepared when it arrives. With the right regulatory framework, the necessary financial support, and the correct trade agreements, the Spanish water industry can be the difference between a vulnerable Europe and a resilient Europe.

This sector connects with the next one —Renewable Energy and Green Transition— because sustainable water management and the energy transition are two sides of the same coin: desalination requires clean energy to be truly sustainable, and renewable energy needs intelligently managed natural resources. What GENAQ does with water, GFM Fotovoltaica does with the sun.

CONGRESS VOICE — Carlos García, CEO of GENAQ

"Water decentralization is the only real response to droughts, climate crises, and water vulnerability."

Bottled water generates CO₂ and our capacity to recycle plastic is limited. Droughts, floods, and the vulnerability of critical infrastructure such as desalination plants in the Gulf are already a reality that severely affects us today. The solution is to decentralize: atmospheric water generation systems that condense air humidity produce high-quality drinking water—with capacities ranging from dozens to thousands of liters per day depending on the generator— at a lower cost than bottled water and without dependence on conventional networks.

These systems are already operational in disaster zones, humanitarian emergencies, and permanent installations in combination with solar photovoltaic energy. GENAQ currently operates in over 75 countries, with applications spanning from humanitarian emergencies to permanent industrial facilities. Its next frontier is integration with green hydrogen technologies, exploring synergies with GFM Fotovoltaica to produce water and energy jointly, autonomously, and completely clean. A model that demonstrates that water resilience does not need large infrastructure: it needs ingenuity, technology, and the political will to scale it.

SECTOR 2 — RENEWABLE ENERGY AND GREEN TRANSITION

Keynote Speaker: GFM Fotovoltaica (Generaciones Fotovoltaicas de la Mancha)
| Javier Bustos Ramos, CEO *Block 1: Strategic Resilience*



0. Reasons for selecting this sector

If the water sector opens this paper because it is the physical foundation of all civilization, renewable energy is the economic foundation for everything that follows. Without clean, affordable, and sovereign energy, the green transition is nothing more than a well-intentioned wish. Industrial decarbonization stalls. Renewable hydrogen does not exist. The electrification of transport stops. And Europe continues to pay, in euros and in geopolitical dependence, the bill for imported fossil fuels.

The war in Ukraine made it clear: Europe had built its prosperity on a fragile energy structure, dependent on external actors whose priorities do not align with our own. The cost of that dependence was not only economic; it was also strategic: an inability to maneuver, pressure on citizens, and a loss of credibility in the climate agenda.

Spain holds a privileged position in this sector. With more than 300 days of sunshine per year in much of its territory, wind resources among the best in Europe, and an engineering and construction industry for renewable plants that has accumulated world-class technical capacity, Spain is not just a country that installs solar panels. It is a country that knows how to design, build, integrate, and manage complex energy systems at an industrial scale.

The time is now because the window of opportunity is closing. China produces more than 80% of the world's photovoltaic panels and is consolidating positions in batteries, inverters, and management software. The United States responded with the Inflation Reduction Act, mobilizing hundreds of billions of dollars to reshore its energy industry. Europe must decide in the coming years whether it wants to be a protagonist in this transformation or simply a customer of those who lead it. GFM Fotovoltaica and companies like it represent exactly what Europe needs: mature industrial capacity, technological integration, international presence, and a commitment to innovation in a sector that brooks no delay.

1. Who We Are and What We Represent

The renewable energy sector in Spain has undergone a transformation over the last fifteen years that few industries can match. From being a market with regulated tariffs and unstable incentives, it has become one of the most dynamic and internationalized sectors of the Spanish economy, with an active presence in more than 40 countries and a value chain that spans from promotion and development to construction, operation, maintenance, and energy commercialization.

Spain is today the fourth largest producer of renewable energy in the European Union and the first in terms of growth potential per capita. Solar photovoltaic energy already represents the main technology for new installed capacity in the country, and it is estimated that by 2030 it will contribute more than 25% of national electricity generation. The sector directly employs more than 100,000 people in Spain and generates a value chain that reaches sectors as diverse as civil engineering, metallurgy, electronics, financial services, and technical consultancy.

GFM Fotovoltaica —Generaciones Fotovoltaicas de la Mancha— is a company with more than two decades of history in the sector. Founded in the year 2000, when solar energy was still a pioneer's bet, it has grown into a specialized technology company operating in four major areas: promotion and management of energy assets, engineering, consultancy and R&D&I, construction of photovoltaic plants with storage (EPC), and operation and maintenance. Through its subsidiary Silbat and its alliance with Saft Ammonia, GFM has extended its field of action to energy storage and green ammonia production, anticipating the convergence that will define the sector in the coming years.

What makes GFM representative is not just its size or its longevity, but its profile: a technology-based company with an international vocation, committed to quality and innovation, and with an explicit social dimension through its GFM Renovables Foundation. In a sector dominated by large “utilities” and investment funds, GFM represents the specialized business fabric that generates knowledge, creates quality employment, and builds the technical resilience that Europe needs.

2. 2030 Sector Vision

In 2030, the renewable energy sector will have completed its transition from an emerging niche to critical infrastructure for the European Union. Not as a metaphor, but in a technical and legal sense: photovoltaic and wind installations, together with energy storage systems, will be treated as essential infrastructures, with the same standards of security, redundancy, and protection that are applied today to telecommunications networks or gas pipelines.

Spain aspires to position itself on that map as the European hub for engineering, integration, and management of the renewable energy mix: not just production, but knowledge, design, and the export of advanced solutions. The conditions exist: exceptional solar and wind resources, competitive generation costs, accumulated technical capacity, and a geographical position that makes Spain Europe's natural gateway to Africa and Latin America. The sector's vision for 2030 is articulated in five transformations:

The integration of PV+BESS as an operational standard, allowing for active grid management and offering services to the system that today are only provided by conventional power plants. Total digitalization: intelligent demand management, generation prediction through artificial intelligence, and the integration of millions of distributed points into a coordinated system. Green hydrogen and ammonia as exportable energy vectors, taking advantage of the surplus renewable generation during hours of maximum irradiation. The recovery of industrial sovereignty in critical components—inverters, panels, batteries, management software—manufactured in Europe or in verifiable allied countries. And Spain as Europe's energy gateway to the Global South, with the capacity to receive and redistribute renewable energy of African origin to the European market.

3. Current Challenges and Competitiveness Levers

The sector today faces an uncomfortable paradox: it has never had so much potential, and it has never faced so many simultaneous risks that could prevent that potential from becoming a real industry.

The first and most urgent is the structural dependence on critical components manufactured in Asia. More than 80% of the photovoltaic modules installed in Europe come from Chinese manufacturers. Inverters, batteries, and software follow the same pattern. This is not a one-off logistical risk: it is a strategic vulnerability that could turn the green transition into a new form of dependence, as dangerous as Russian gas once was.

The second challenge is the absence of a true European single energy market. Grid connection rules, access tariffs, auction mechanisms, and technical standards vary significantly between member states, making cross-border projects more expensive and slowing down the integration of national systems.

Regulatory unpredictability is the third brake. Retroactive changes in incentive frameworks generate a risk premium that makes financing more expensive and drives away long-term investment. Without regulatory certainty, no industrial policy is possible. And the shortage of specialized technical talent adds a fourth bottleneck: the

speed of deployment exceeds the capacity to train engineers, maintenance technicians, and specialists in storage systems.

Faced with these challenges, the sector has real levers at its disposal. Continuous technological innovation: the learning curve of photovoltaics has reduced costs by more than 90% in fifteen years, and storage is following the same trajectory. Vertical integration, which allows for everything from project development to operation and maintenance, generating more solid margins and greater quality control. And internationalization under the Europe brand: the standards of quality, traceability, and sustainability that the European market demands become a differential competitive advantage in emerging markets seeking exactly that guarantee.

4. Regulatory, Customs, and Trade Framework

The European framework for the renewable sector is, at the same time, its greatest driver of demand and its greatest source of operational uncertainty. The Fit for 55 package, REPowerEU, and the revision of the Renewable Energy Directive — RED III— set ambitious goals: at least 42.5% renewables in the European energy mix by 2030. This generates enormous structural demand. The problem lies in how the path is regulated.

European Grid Codes establish technical conditions for generation, control, and capacity that installations must meet, but their transposition varies between member states, generating asymmetries that distort competition and complicate cross-border projects. Regarding sustainability, the CSRD and ESG criteria impose increasing reporting obligations that are manageable for large companies but disproportionate for SMEs, which make up the majority of the sector's value chain.

In the trade and customs arena, tariff unpredictability is the central problem. Tariffs on Chinese panels, anti-dumping investigations, and safeguard measures occur without a coherent long-term strategy. Companies need certainty about which components they can use and at what price. This certainty does not exist today, and its absence has a real economic cost that is transferred to the final price of energy. In international tenders, the sector detects significant friction where Chinese and American competitors access soft state financing that European companies cannot match without an equivalent support framework.

5. Proposals to the European Commission

Proposal 1. A coherent and stable industrial policy for renewables, with real financial instruments: production credits, guarantees for new European component factories, and one-stop shops that coordinate the EIB, Horizon Europe, and InvestEU. The Net-Zero Industry Act is a good start, but insufficient in its current execution.

Proposal 2. Effective technical harmonization and real administrative simplification in the energy internal market. Grid Codes must be applied uniformly, with binding maximum deadlines for the processing of new installations. Building a solar plant should not take more administrative time in Europe than in any other region of the world.

Proposal 3. Strategic trade policy for critical components that combines predictable temporary protection, supply agreements with allied countries to diversify dependencies, and preferential financing for projects with verified European or allied manufacturing content.

Proposal 4. A dedicated and stable regulatory framework for energy storage. BESS must be recognized as a grid asset in all member states, with clear remuneration mechanisms for the services it provides to the system and access to public financing on terms comparable to generation plants.

Proposal 5. Decisive financial and diplomatic support for the internationalization of the Spanish and European renewable industry. The export guarantees of European ECA mechanisms and the presence of the EIB in emerging markets must be expanded so that European companies can compete on equal terms in the tenders where the global energy leadership of the next cycle is at stake.

6. Final Message

Europe is staring at a historic opportunity that won't come around twice: to lead the biggest energy transformation in modern history. We've still got the tech and industrial edge, but it's real, and it's slipping away every year because our response isn't matching the scale of the challenge.

Spain is ready to be Europe's renewable powerhouse. We've got the resources, the know-how, the companies, and the perfect location. What we need now is the framework: regulatory stability, an industrial policy that thinks in decades, and a trade strategy that gets that energy isn't just about economics anymore—it's pure geopolitics.

For the solar and storage sector to truly back the EU's strategic autonomy, we need an industrial policy that supports the energy transition with real financial muscle, long-term regulatory certainty, and a trade strategy that treats energy as what it actually is: the most strategic resource of the 21st century.

This sector connects with the next one —Naval Industry, Maritime Defense, and Marine Technologies— because strategic sovereignty doesn't stop at the shoreline. If Spain wants to be Europe's energy hub, it also has to control the routes and the means by which that energy reaches our coasts. What GFM does with the sun, Navantia does with the sea.

CONGRESS VOICE — Javier Bustos, CEO of GFM Fotovoltaica

"Europe's energy future depends on storage and a smart renewable mix."

Spain had the chance to become Europe's energy leader, but it has become its own worst enemy: we've installed so much solar capacity that prices hit rock bottom (or go negative) during peak hours, yet we're still stuck paying for gas because we don't store what we produce. Real energy independence won't come from just slapping up more panels; it's going to come from combining solar, wind, and biomass with cutting-edge storage solutions: molten silicon batteries, green hydrogen, and green ammonia—which can be stored in bags and burned in engines after pre-cracking.

GFM has been developing wind farms since 2000 and solar plants since 2002. Today, we are betting on award-winning projects backed by the CDTI that explore new ways to store and manage energy, including distributed generation, which cuts our reliance on vulnerable critical infrastructure. The collaboration with GENAQ to produce green hydrogen without river water or outside air, along with green ammonia projects for shipping, opens up a whole new dimension: Spain as an exporter of clean energy, not just a producer.

BLOCK 2: STRATEGIC INDUSTRY, MOBILITY, LOGISTICS, AND TECHNOLOGY

SECTOR 3 — NAVAL INDUSTRY, MARITIME DEFENSE, AND MARINE TECHNOLOGIES

Keynote Speaker: Navantia | Javier López San Román: Block 2: Strategic Industry, Mobility, Logistics, and Technology



0. Reasons for selecting this sector

90% of everything we buy, use, and consume in Europe arrived on a ship at some point. Global trade is, for the most part, maritime trade. And yet, when we think about strategic industry, we usually picture chips, electric cars, or AI. We rarely think about the oceans.

That is exactly the mistake this sector is here to fix.

The sea is the invisible highway of the global economy. Submarine cables carry 97% of the world's internet traffic. Maritime routes connect continents, stock supermarkets, and move critical raw materials. And those who control those routes—those who build the ships, the frigates, the underwater surveillance systems, and the offshore platforms—hold massive strategic power.

Spain has a naval industry with centuries of history and a top-tier European technological capacity. **Navantia, a Spanish state-owned company,** builds all types of surface and submarine naval platforms, from frigates to submarines for the Spanish Navy and international clients. It is the largest European shipyard in terms of facility capacity (slipways), with the ability to autonomously design and build highly complex warships—something very few countries in the world can do.

In a time when Europe is talking about strategic autonomy and cutting external dependencies, having our own technologically advanced naval industry with maritime defense capabilities isn't a luxury: it's a necessity.

1. Who We Are and What We Represent

The Spanish naval industry is about much more than just building ships. It covers the design and manufacturing of civil and military vessels, platform and combat systems, fleet maintenance, underwater engineering, maritime surveillance tech, and increasingly, marine renewable energy like offshore wind.

In economic terms, the naval sector in Spain generates over 25,000 high-skilled direct jobs and moves around €4 billion annually. Its main hubs are in Galicia, Cádiz, Cartagena, and the Basque Country, acting as one of the most vital industrial engines for those regions.

Navantia is the Spanish state-owned military shipbuilding company and one of the most technologically advanced shipyards in Europe. It builds F-110 frigates —the most modern in the Spanish Navy, packed with next-gen combat systems—, S-80 submarines with AIP propulsion, supply ships, and support platforms. Plus, it exports to countries like the UK, Australia, and Saudi Arabia, going head-to-head with the big European and South Korean shipyards.

What makes Navantia a standout is its integration capacity: it doesn't just build the ship's hull; it designs, integrates, and tests every single system —propulsion, weaponry, communications, sensors, combat management— turning it into a complete, unified system. Very few shipyards in the world have that kind of muscle, as most just integrate systems designed by outside specialized firms.

Javier López San Román represents in this paper a company that is, in itself, a symbol of the technological and industrial sovereignty of Spain.

2. 2030 Sector Vision

In 2030, the oceans will be a space for strategic competition more intense than ever before. Geopolitical tensions in the Strait of Hormuz, the South China Sea, the Red Sea, the Mediterranean, the North Atlantic, and the Arctic are no longer hypothetical scenarios: they are present realities that demand solid naval capabilities from Europe.

At the same time, the sea will be a space of growing economic opportunity: offshore wind energy, industrial aquaculture, seabed mining, communication cables, and new logistical routes arising from Arctic melting. Whoever secures a technological and industrial presence at sea through naval power will hold a massive strategic advantage.

Spain imagines that 2030 with Navantia and the naval sector as a whole playing three simultaneous roles:

European maritime defense provider. With NATO countries cranking up their defense budgets and Europe's urgent need to cut its military reliance on the US, European shipyards are looking at a historic opening. Navantia wants to be the go-to partner for building and maintaining the European naval fleet, specifically leading the charge in hybrid fleet development and the design and construction of next-gen submarines and frigates.

Leader in green naval technology. Cleaning up maritime transport is one of the world's biggest hurdles: ships pump out 3% of global CO₂ emissions. By 2030, new vessels will have to run on alternative fuels —hydrogen, ammonia, methanol— and Navantia aims to be at the forefront of designing and building this new generation of clean ships.

Innovation hub for marine technologies. Underwater drone surveillance, autonomous coastal patrol systems, ocean monitoring sensors: this is all dual-use tech, vital for both defense and civil applications like managing subsea cables or protecting critical offshore infrastructure. Spain is perfectly positioned to lead this innovation space at a European level.

3. Current Challenges and Competitiveness Levers

The Challenges:

The first is Asian competition in civil shipbuilding. South Korea, China, and Japan dominate the world market for large civil vessels with prices that European shipyards cannot match. Spain and Europe have chosen to specialize in high-value-added vessels —military, cruise ships, offshore— but this specialization requires continuous investment in R&D and talent training.

The second challenge is the financing of defense programs. Naval military contracts are massive —an F-110 frigate costs more than 700 million euros— and require long-term financing, state guarantees, and budgetary stability. Fluctuations in defense budgets create uncertainty that complicates industrial planning.

The third challenge is the long project cycle. Designing and building a submarine can take 10 to 12 years. This requires maintaining highly specialized teams for decades, retaining talent in a competitive labor market, and managing highly complex supply chains with providers from all over the world.

Finally, the technological gap in autonomous systems. Naval drones, electronic warfare systems, and AI applied to maritime defense are areas where the United States

and China hold an advantage. Europe —and Spain within it— needs to accelerate investment in these technologies to avoid falling behind.

The Levers:

The primary lever for Navantia and the Spanish naval sector is accumulated experience and knowledge of complex systems. Building an operational submarine is one of the most difficult engineering challenges in existence. Only about a dozen countries in the world have this capability. Spain is one of them, and that cannot be improvised.

The second lever is geographical position. Spain controls the Strait of Gibraltar, one of the most important maritime transit points in the world, and has access to both the Atlantic and the Mediterranean. This position gives the Spanish naval industry a natural strategic relevance for European maritime defense.

The third is the European Defence Fund (EDF), which for the first time in EU history finances defense R&D projects collaboratively among member states. Navantia already participates in several of these projects and has the capacity to lead European consortia in naval technology.

4. Regulatory, Customs, and Trade Framework

The military naval sector operates within a very specific regulatory framework, dominated by national defense and security regulations, export agreements for war materiel, and the rules set by NATO and the EU's Common Security and Defence Policy.

The European Defence Procurement Directive (2009/81/EC) regulates how Member States purchase military equipment, attempting to open up the European defense market and reduce fragmentation. In practice, states still mainly buy from their national industries, which limits European economies of scale. Moving toward deeper integration of the European defense market —without sacrificing national industrial capacities— is one of the biggest regulatory debates of the moment.

Regarding **exports**, the sector faces a complex system of licenses and export controls, with rules that vary between Member States and sometimes create competitive asymmetries. A French or German company might find it easier to export certain materiel than a Spanish one, not for technical reasons, but due to differences in national export control frameworks.

The European Defence Fund is the major regulatory and financial game-changer. With a budget of €7.9 billion for the 2021-2027 period, it funds collaborative R&D defense projects. For the naval sector, this is a massive opportunity, but also a challenge: consortiums require coordination between multiple countries and companies, and the associated red tape is considerable.

5. Proposals to the European Commission

Proposal 1. Create a coordinated European naval industrial strategy. Europe cannot afford to have twelve military shipyards competing against each other while the US and China consolidate their naval industries. The Commission must push for a roadmap based on specialization and complementarity among European shipyards, where each leads in what they do best. Spain, with Navantia, has a clear and vital role in the naval sector.

Proposal 2. Simplify and harmonize export licenses for naval defense equipment. The differences in export regimes between Member States create unfair competition within the EU itself. A harmonized European framework —while maintaining necessary controls— would provide more legal certainty for companies and facilitate the coordinated export of European defense systems.

Proposal 3. Expand the European Defence Fund with specific lines for autonomous naval technology. Underwater drones, autonomous coastal surveillance systems, and AI applied to naval warfare are the technologies that will define the maritime defense of the future. Europe needs to invest in them now. The EDF must include a specific line for these technologies, with active participation from Spain as a specialized country.

Proposal 4. Include naval decarbonization in the European Green Deal funds. The transition to clean propulsion vessels requires massive investment in R&D and shipyard adaptation. Green Deal funds —which until now have been heavily focused on land transport— must include specific lines for the decarbonization of maritime transport, with special attention to the industrial shipbuilding value chain.

Proposal 5. Protect critical maritime infrastructure as a European security priority. The sabotage of the Nord Stream pipeline and subsea cables in the Baltic proved that underwater infrastructures are vulnerable. The EU needs a strategy to protect critical maritime infrastructure —cables, pipelines, platforms— that includes investment in underwater surveillance technology. Spain and Navantia can lead that capability.

6. Final Message

The oceans are not just the backdrop of the global economy. They are the stage itself. Europe's trade, energy, communications, and security all depend on what happens at sea, under the sea, and in the ports that connect it all to dry land.

Spain has a naval industry with the real capacity to build the ships, submarines, and systems Europe needs to be sovereign in that space. We don't say this as an aspiration: we say it as a present reality that simply needs the right institutional backing to scale.

If Europe wants to be strategically autonomous, it needs to control its seas. And to control its seas, it needs a strong European naval industry. Spain, with Navantia at the helm, is ready to lead that collective effort.

The sea has always been the space where empires and powers are defined. In the 21st century, it will be no different. The question is whether Europe will be on that map as a protagonist or just a spectator.

This sector connects with the next one —Ports, Infrastructure, and Global Connectivity— because ships need ports. The naval industry builds the vessels that move the world, but it's the ports that receive them, manage them, and plug them into the rest of the economy. Without efficient ports, the best fleet in the world loses its value.

CONGRESS VOICE — Javier López San Román, Navantia

"Strategic autonomy starts by investing in R&D and protecting our industrial capacity."

Navantia pours 7.2% of its revenue into R&D and collaborates actively with Spanish universities. Its tech bet is clear: the S-80 submarine in Cartagena is already running on hydrogen fuel cells, they have a green ammonia collaboration hub, and they are developing synergies with Iberdrola's offshore wind projects in the North Sea. This isn't just shipbuilding; it's complex systems engineering at the highest European level.

In defense, they have managed to reduce the non-European component in their projects by up to 35%, betting on the Open Strategic Autonomy that the European Commission itself demands: the freedom to choose the best tech available and the capacity to develop cutting-edge tech in-house. The F-110, Spain's most advanced frigate, already has a digital twin—a milestone in industrial digitalization that very few shipyards in the world can match.

Navantia is also a powerhouse for European collaboration: its projects gain momentum by forming consortiums with SMEs from third countries, pulling the Spanish industrial

fabric into the major programs of the European Defence Fund. The shifting geopolitical landscape reinforces the need to consolidate a genuinely European defense industrial base, less dependent on extra-communitarian suppliers and markets. The sea, strategic resources, and critical infrastructure need protection. Spain, with Navantia, has the capacity to deliver it.

SECTOR 4 — PORTS, INFRASTRUCTURE, AND GLOBAL CONNECTIVITY

Keynote Speaker: Propeller Club Vigo | Antonio Búa, President *Block 2: Strategic Industry, Mobility, Logistics, and Technology*



0. Reasons for selecting this sector

Think about the last time you bought something online. That package traveled thousands of miles before reaching your door. And at some point along that journey, almost certainly, it passed through a port.

Ports are the entry and exit gates of the global economy. They are the point where maritime trade—which moves 90% of the world's goods— connects with roads, railways, warehouses, and factories. Without efficient ports, the economy grinds to a halt. Literally.

Spain has a geographical advantage that very few European countries can boast: it sits at the exact crossroads of the Atlantic and the Mediterranean, between Europe, Africa, and Latin America. Its ports are not just national infrastructure: they are strategic nodes of European and global connectivity. The Port of Algeciras is Europe's Atlantic-Mediterranean gateway and a direct competitor to Tanger Med. The Port of Valencia is the largest container port in the Spanish Mediterranean. The Port of Vigo is Europe's leading fishing port. Las Palmas and Tenerife are strategic hubs on the routes between Africa, Europe, and America.

And yet, Spain is not fully tapping into that potential. There are critical gaps to bridge, investments to be made, and political decisions to be taken. The proposal from Antonio Búa and the Propeller Club of Vigo is clear and ambitious: **Spain must become Europe's Logistics Gateway by 2030.** Not just aspire to it. Be it.

This sector is here because if Spain doesn't take that leadership now, Morocco, Turkey, or Northern European ports will. The window of opportunity is real, but it won't stay open forever.

1. Who We Are and What We Represent

The Spanish port system is made up of 46 ports of general interest managed by 28 Port Authorities, coordinated by Puertos del Estado. Together, they move more than 550 million tons of cargo per year, handle over 20 million containers, and generate an economic activity exceeding €15 billion annually, with more than 35,000 direct jobs and over 145,000 indirect ones.

But the numbers are just the surface. The true strategic dimension of the sector is understood by looking at the map and the geopolitical moment. Spain controls the access to the Mediterranean from the Atlantic, has a unique proximity to Africa —the continent with the highest logistical growth in the world, projected at 6% annually— and maintains historical, cultural, and business ties with Latin America that no other European country can replicate.

That set of assets makes Spain the natural candidate to be **Europe's Logistics Gateway**: the hub from which trade between Europe, Africa, and America is organized, redistributed, and managed. But being a candidate is not the same as getting the job. There is work to be done.

The Propeller Club is an international organization present in more than 60 countries, connecting maritime and port professionals: shipowners, logistics operators, customs agents, naval engineers, maritime lawyers, and public institutions. The **Vigo** chapter is one of the most active in Spain, anchored in a city whose history, economy, and identity are built on the sea.

Antonio Búa, its President, brings something fundamental to this congress: not the voice of a single company, but the voice of the entire port ecosystem. A vision that integrates what ports need, what the companies using them need, what the workers operating them need, and what the territories depending on them need. And a concrete proposal —the Spain Gateway 2030 model— that turns that vision into a roadmap.

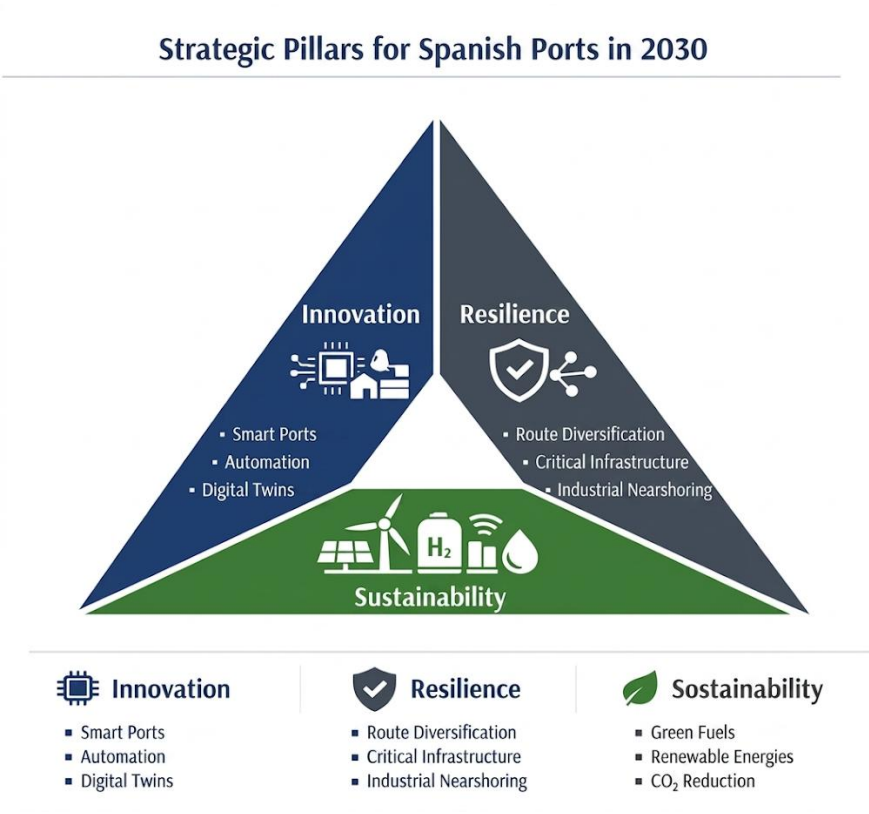
2. 2030 Sector Vision

The vision is so concrete it has its own name: Spain **Gateway 2030**. A model that proposes transforming the Spanish port and logistics system into an integrated territorial ecosystem that combines maritime and inland ports, rail and road corridors, digital platforms, industrial zones, and specialized talent. Not just a "better port," but a top-tier European national logistics system.

To put this into concrete figures: today Spain handles 12% of container traffic in the Western Mediterranean. By 2030, the goal is to exceed 18%, with Spain operating as a redistributor hub. Today, the Port of Algeciras is among the top 25 in the world. By 2030, the goal is the Top 15. Today, less than 5% of ships calling at Spanish ports use alternative fuels. By 2030, the target is to exceed 25%.



These numbers aren't fantasy: they are the direct result of a strategy built on three pillars:



3. Current Challenges and Competitiveness Levers

The Challenges:

The most urgent and serious **is the rail deficit**. Northern European ports —Rotterdam, Hamburg, Antwerp— move between 40% and 50% of their cargo by rail to the continent's interior. In Spain, that figure doesn't get past 3-5% for most ports. This gap is brutal and explains a huge part of the competitive divide. The Mediterranean Rail Corridor —the axis that should connect Algeciras to the French border with international gauge compatibility— is still not finished. As long as it isn't, Spain cannot compete on a level playing field.

The second challenge is **digital fragmentation**. Multiple logistics and port management platforms in Spain simply don't talk to each other. A container arriving at port might have its paperwork in a system different from the one customs uses, the one the trucker uses, or the one the destination warehouse uses. This lack of interoperability breeds inefficiency, delays, and avoidable costs.

The third challenge is the **risk of "carbon leakage" or traffic** diversion to ports in countries not subject to European emissions regulations. Tanger Med in Morocco and Nador West Med are direct competitors to Algeciras. If the EU ETS —which is basically a price tag on pollution— makes calling at Spanish ports more expensive without Moroccan ports having equivalent obligations, the risk is real: shipowners may prefer to transship in Morocco to dodge the cost.

The fourth challenge is the **shortage of qualified talent**. A deficit of 40,000 professionals in digital and green logistics is estimated by 2027. Logistics data managers, port automation technicians, alternative fuel specialists: profiles that the education system isn't churning out fast enough for the sector's needs.

The Levers:

The most powerful is **geographical position**, an asset no amount of investment can buy. Spain is where it is —at the crossroads of the world's most important routes— and that is a permanent structural advantage we must capitalize on.

The second lever is the **emergence of new maritime routes** that directly favor Spanish ports. Instability in the Red Sea has brought back the Cape Route —looping around Africa— as the alternative for Asia-Europe trade, and Algeciras is the natural first European stop on that route. The new IMEC corridor —India-Middle East-Europe— also sees Western Mediterranean ports as a logical terminal destination.

The third lever is the **EU's Global Gateway initiative**, which is essentially the European plan for infrastructure investment in Africa and Latin America. Spain, due to its location

and ties, must lead this initiative and turn its ports into the central nodes of that connectivity.

4. Regulatory, Customs, and Trade Framework

The port sector operates at a complex intersection of regulations that are shifting fast, creating both opportunities and risks.

The Maritime EU ETS —the extension of the European emissions market to shipping, in effect since 2024— is likely the most impactful regulatory change for the sector in years. It forces shipowners to pay for the CO₂ emissions of their vessels when calling at European ports. This pushes the move to alternative fuels but also creates the risk of traffic fleeing to third-country ports not subject to the same rules. Managing this risk is one of the biggest regulatory battles right now.

The FuelEU Maritime Regulation mandates a progressive reduction in the carbon intensity of fuels used in European shipping. For ports, this means investing in alternative fuel infrastructure: supply points for hydrogen, ammonia, LNG, and OPS (onshore power supply), which is basically the maritime equivalent of plugging the ship into the port's electric grid.

The reform of the Union Customs Code towards full digitalization by 2028 is a massive chance to slash times and costs, but it requires all ports to invest in compatible systems. The national digital single window —NSW Spain 2.0— must be operational in all TEN-T ports by 2026 and fully integrated with the equivalent European system by 2027.

The TEN-T Regulation determines which transport infrastructures are priorities for European investment. Spain must actively defend the inclusion of its ports and corridors in the core network, and must demand that the Commission treats the Mediterranean Corridor with the same urgency as Northern corridors.

Finally, the **EU FDI Screening Regulation** is increasingly relevant for ports—critical infrastructures that have caught the eye of sovereign wealth funds and state-owned enterprises from third countries with agendas that go beyond pure commercial logic.

5. Proposals to the European Commission

Proposal 1. Fund and complete the Mediterranean Rail Corridor as an absolute priority before 2028. Without a high-quality rail connection, no Spanish port can

compete with Rotterdam or Hamburg. The European Commission must treat the completion of the Mediterranean Corridor in international gauge—including direct rail access to the Port of Algeciras and improving border crossings with France—as a strategic priority on par with any other European infrastructure project. Brussels must pressure France to accelerate its section of the corridor, which is currently the main bottleneck.

Proposal 2. Harmonize the Maritime EU ETS with protection mechanisms against third-country competition. If European ports pay for their emissions but ports in Morocco or Turkey don't, the system creates a competitive asymmetry that penalizes those who comply. Spain must lead negotiations in Brussels to align carbon costs with Mediterranean competitors and push for the extension of the Carbon Border Adjustment Mechanism (CBAM) to the logistics services sector.

Propuesta 3. Create a "Spain Gateway 2030" strategy recognized and funded at the European level. Transforming the Spanish port system into Europe's Logistics Gateway cannot be funded by national resources alone. The Commission must formally recognize the strategic role of Southern European ports in the EU's global connectivity and set up specific funding lines—via the Connecting Europe Facility and cohesion funds—for digitalization, decarbonization, and intermodal connectivity.

Proposal 4. Push for an integrated digital single window at the European scale. Customs and logistics digitalization only makes sense if it's interoperable: an operator should be able to manage their paperwork in a single system, regardless of the entry port or destination country. The Commission must speed up the implementation of the EMSWe—the European Maritime Single Window environment—and ensure all Member States, including Spain, are fully integrated by 2027.

Proposal 5. Position Spain as the European hub for green fuels in maritime transport. With the highest renewable energy potential in Western Europe, Spain is the ideal country to produce and distribute green hydrogen, ammonia, and other clean fuels for the European maritime fleet. The Commission must include Spanish ports in its maritime decarbonization strategy with priority investment in bunkering infrastructure, aiming for more than 25% of ships calling at Spanish ports to use clean fuels by 2030.

6. Final Message

Spain has the geography. It has the ports. It has the routes. It has the ties with Africa and Latin America that no other European country can replicate. It has the renewable potential to produce the clean fuels that the future of shipping demands. And it has the

ambition, proven by people like Antonio Búa and the Propeller Club of Vigo, to turn all this into a real, executable strategy.

What's missing isn't on the map or in the sea: it's in the investment decisions, the political will, and the European institutional backing to ensure Spain stops being Europe's "peripheral south" and becomes its main gateway to the world.

Spain has everything it takes to become the "South that moves Europe." By 2030, the Port of Algeciras can be in the global top 15. Rail corridors can connect the Mediterranean to Central Europe in hours. Spanish ports can be the preferred green bunkering hubs for the Atlantic and the Mediterranean. All of this is possible. The question is whether we have the ambition to lead it—and if the European Commission is ready to bet on the South with the same conviction it has shown for the North.

This sector connects with the next one —Transport and Logistics— because ports are the start of the chain, but not the end. Once goods land, they need to reach their destination: factories, warehouses, stores, and consumers. That's where the land transport and logistics sector comes in to complete the journey and determine the ultimate efficiency of the entire supply chain.

CONGRESS VOICE — Antonio Búa, President of Propeller Club Vigo

"Spain can be Europe's great energy and logistics gateway, but it needs infrastructure and harmonization."

Algeciras is currently a transshipment port without decent roads or railways, despite being one of the world's most important hubs for decades. Valencia and Barcelona have grown thanks to connections like Zaragoza, but the share of goods moved by rail in Spain doesn't exceed 3.5-5%, compared to 55% in Hamburg. That gap explains almost everything. Our 28 port authorities answer to regional political goals instead of a coherent national strategy, and European emission over-regulation adds asymmetric pressure: a ship with 24,000 TEUs generates hundreds of thousands of euros in fees that competitors in Tanger Med don't pay. The result? Tanger Med has already snatched 25% of Algeciras' business. We are hurting ourselves.

The potential, however, is massive. The Canary Islands connect with Latin America in just five days of sailing. New routes around Africa, driven by Red Sea instability, make Spanish ports the natural first stop in Europe. Spain has the renewable power to become the great green bunkering provider for the Atlantic and Mediterranean. What's missing is a true national Logistics Gateway: ports, a completed rail corridor, integrated digital platforms, a national single window, digital twins, and a logistics observatory that lets us know—just like China does—where every container is in real-time.

SECTOR 5 — TRANSPORT AND LOGISTICS

Keynote speaker: AET – South Galicia Delegation | Antonio Búa *Block 2: Strategic Industry, Mobility, Logistics, and Technology*



0. Reasons for selecting this sector

There are sectors that everyone sees and sectors that no one sees, but without which nothing works. Transport and logistics clearly belong to the second group.

When a supermarket has full shelves, when a factory receives its parts on time, or when the package you ordered yesterday hits your doorstep today, there is a massive, complex logistics chain working invisibly and perfectly behind the scenes. When that chain breaks—as it did during the COVID-19 pandemic—the entire world feels it instantly.

The pandemic was the great unintended experiment that proved what logistics experts already knew: global supply chains are incredibly efficient under normal conditions but fragile in the face of disruptions. And in a world with more disruptions—climate, geopolitical, technological—that fragility becomes a top-tier strategic risk.

Spain is the fifth largest country in the EU by road freight volume and one of the main logistics corridors between Europe and the south of the continent. Its position on the Iberian Peninsula makes it the natural gateway for trade between Europe, Africa, and America. It has a business fabric—thousands of freelancers, SMEs, and large operators—that serves as the silent backbone of the national economy.

1. Who We Are and What We Represent

The transport and logistics sector in Spain is one of the heavyweights of the national economy. It moves over €100 billion a year, employs more than 900,000 people directly—making it one of the country's top employers—and accounts for around 6% of the national GDP. It covers everything from road, rail, air, and sea freight to warehousing, distribution, inventory management, and supply chain coordination.

Freight Transport KPIs in Spain



Road transport is the dominant player: over 85% of goods moved within Spain travel by truck. This involves a fleet of more than 300,000 heavy vehicles and a community of hauliers —many of them freelancers or micro-SMEs— who form the most resilient and far-reaching fabric of the national logistics system.

AET —Asociación Empresarial del Transporte— is an organization representing companies and professionals in the road freight sector. Its **South Galicia Delegation** operates in one of the most geographically strategic zones for logistics in the northwest of the peninsula: a region connecting Galician ports —Vigo, A Coruña, Marín— with inland Spain and Portugal, driven by the automotive, canning, and fishing industries.

AET represents in this paper the voice of real hauliers: the ones behind the wheel, the ones managing fleets, and those who deal every day with diesel costs, driver shortages, tolls, red tape, and the relentless pressure from big clients to slash prices and lead times. It's a voice that often fails to reach Brussels with the strength it deserves.

2. 2030 Sector Vision

By 2030, the transport and logistics sector will have undergone the most profound transformation in its recent history. Three simultaneous forces are

redrawing the landscape: mandatory decarbonization, accelerated digitalization, and the overhaul of global supply chains into more resilient and regionalized models.

Spain wants to be at the heart of this transformation, not on the sidelines. The goal is to build a national logistics system that is simultaneously efficient, sustainable, digital, and resilient—leveraging the country’s privileged geographical position to become the great logistics corridor between Europe and the rest of the world.

That 2030 vision is built on four major pillars:

Pillars of Freight Transport in 2030



3. Current Challenges and Competitiveness Levers

The Challenges:

The most urgent and concrete is the **shortage of professional drivers**. Europe needs to bring in over 400,000 truck drivers in the coming years just to keep current activity levels alive. In Spain, the average age of drivers is over 50, and the influx of young people into the sector is nowhere near enough. The cost and length of professional license training, working conditions, and the sector's image are barriers that need an urgent fix.

The second challenge is **the energy cost and fleet transition**. A freelance haulier with a diesel truck lives and dies by fuel prices, which can account for 30-35% of their total costs. The shift to electric or hydrogen vehicles is inevitable, but alternative vehicles

currently cost two to three times more than a diesel equivalent, and charging infrastructure for heavy vehicles is still incredibly scarce in Spain.

The third challenge is the **pressure on margins**. The road transport sector is highly fragmented —thousands of small operators— while large shippers hold massive bargaining power. Margins are razor-thin, competition is fierce, and any cost hike — fuel, tolls, wages— is hard to swallow. This kills the incentive to invest in modernization and digitalization.

The fourth challenge is the **digital divide between the big players and the small ones**. Major logistics operators —Amazon Logistics, DHL, XPO— are pouring money into digitalization, automation, and data management. Transport SMEs are being left behind, not for lack of will, but for lack of resources and access to tools scaled to their size.

The Levers:

Spain's geographical position is, just like with the ports, a structural advantage: the country is the natural corridor between Europe and the Global South. This creates a sustained logistics demand that no temporary crisis can wipe out.

The Spanish road infrastructure network is one of the densest and most modern in Europe, the result of decades of investment in highways and motorways. This infrastructural base is a solid platform on which to build the logistics of the future.

And the fabric of specialized operators —in food, automotive, temperature-controlled goods, and hazardous materials— is a value-added lever that generalist giants cannot easily replicate.

4. Regulatory, Customs, and Trade Framework

The transport sector operates under an extremely dense regulatory framework, both at the European and national levels, affecting labor conditions, technical vehicle requirements, emissions, driving and rest times, cabotage, and market access.

The European Mobility Package, approved between 2020 and 2022, has introduced major shifts: new rules on the mandatory return of drivers to their country of residence, stricter limits on cabotage, and tougher establishment requirements for transport companies. The goal was to curb "social dumping" —unfair competition from operators in lower-wage countries— but its implementation has sparked friction and added operational costs for many firms.

The CO₂ Regulation for heavy-duty vehicles sets emission reduction targets of 45% by 2030 and 90% by 2040 compared to 2019 levels. This puts massive pressure on truck manufacturers—who must develop viable alternatives—and on hauliers, who have to renew their fleets within very tight deadlines.

Customs regulation following Brexit has added a layer of complexity to operations between Spain and the UK, one of the primary destinations for Spanish road transport. The extra red tape has driven up costs and lead times, especially for smaller operators with no prior experience in international customs management.

Regarding **trade agreements**, logistical connectivity with Morocco, Algeria, and North Africa is strategically vital for Spain, but it still operates under heterogeneous regulatory frameworks and border controls that cause avoidable delays and costs.

5. Proposals to the European Commission

Proposal 1. Create a European program to train and attract professional drivers.

The driver shortage is a structural mess that no country can fix on its own. The Commission must push a European program for training, mutual recognition of qualifications, and improved working conditions, with a laser focus on bringing in young people and underrepresented groups like women.

Proposal 2. Establish a European fleet transition fund for transport SMEs. The shift to zero-emission vehicles shouldn't crush small hauliers. The Commission needs to set up a specific fund—complementing national ones—to subsidize the price gap between a diesel truck and its electric or hydrogen alternative, with special terms for freelancers and micro-SMEs.

Proposal 3. Fast-track the rollout of heavy-duty charging infrastructure on European corridors. It makes zero sense to force hauliers to buy electric trucks if there's nowhere to plug them in on their routes. The AFIR regulation—which governs alternative fuel infrastructure—must be implemented with real urgency, ensuring public investment in stretches where private profit isn't enough to attract operators.

Proposal 4. Simplify customs and logistics regulations at Europe's southern borders. The borders between Spain, Morocco, and North Africa are logistical bottlenecks hurting Euro-African trade. The Commission must work with neighboring countries to digitalize and streamline border controls, slash waiting times, and harmonize paperwork, turning these borders into corridors of opportunity instead of barriers.

Proposal 5. Integrate logistics as a strategic pillar of European nearshoring policy. If Europe wants to pull production back from Asia —and everything points that way— it has to guarantee that internal logistics are competitive, efficient, and sustainable. This means investing in intermodality, digital customs, and strategic logistics hubs. Spain, as the natural bridge between Europe and the Global South, must be at the center of this strategy.

6. Final Message

Logistics doesn't make the headlines when it works. It only appears when it fails. And when it fails, the impact is immediate, visible, and painful: empty shelves, stalled factories, companies without supplies, and citizens left without what they need.

Spain has the geography, the infrastructure, and the business fabric to be Europe's great logistics corridor. But that potential doesn't realize itself: it requires investment in decarbonization, digitalization, and intermodality, and it needs European regulation to support the transformation rather than hinder it.

Transport and logistics are not just the backdrop of the economic stage: they are the circulatory system of the European economy. If that system works well, everything else can function. If it fails, everything stops. Spain can be the heart of that system. We just need the conditions to beat strong.

The challenge is not small. But neither is the opportunity. A sector that employs nearly a million people, moves the equivalent of 6% of GDP, and connects Spain with the world deserves to be at the center of the European agenda, not on its margins.

This sector connects with the next one —Robotics, Automation, and Deep Tech— because the future of logistics is, to a large extent, the future of automation: robotic warehouses, autonomous vehicles, and intelligent management systems. The boundary between logistics and technology is dissolving, and companies that grasp this convergence before the rest will hold a decisive competitive edge.

CONGRESS VOICE — Antonio Búa, AET South Galicia Delegate

"Spain has the geography, the infrastructure, and the business fabric to be Europe's great logistics corridor, but the economy's circulatory system needs the right conditions to beat strong."

Road transport moves over 85% of goods in Spain, with a fleet of more than 300,000 heavy vehicles and nearly a million direct jobs. It is the most resilient and widespread sector of the national economy, yet also the quietest: it only makes headlines when it fails. And when it fails, everything stops.

The challenges are concrete and urgent. Europe needs to bring in over 400,000 drivers in the coming years; in Spain, the average age exceeds 50, and not enough young people are joining. The shift to electric or hydrogen vehicles is inevitable, but alternative trucks cost two to three times more than a diesel equivalent, and charging infrastructure for heavy vehicles is still incredibly scarce. The sector is highly fragmented, margins are razor-thin, and any hike in costs —fuel, tolls, or wages— is absorbed with enormous difficulty.

Added to this is the post-Brexit regulatory complexity, which has made operations with the UK more expensive and slower, and the borders with Morocco and North Africa, which remain logistical bottlenecks when they should be corridors of opportunity. The digital divide between major operators and transport SMEs grows wider every year. Without investment in decarbonization, digitalization, and intermodality, and without European regulation that supports rather than hinders, Spain's logistics potential will remain an unfulfilled promise.

SECTOR 6 — ROBOTICS, AUTOMATION, AND DEEP TECH

Empresa ponente: ODYSSEY ROBOTICS | Javier Martínez, Founder. Expert in Industrial Robotics and Automation *Block 2: Strategic Industry, Mobility, Logistics, and Technology*



0. Reasons for selecting this sector

There is a question that many European business owners ask themselves in silence: How do I compete with a Chinese factory that produces the same product as I do, with half the workers, double the speed, and at a third of the price?

The answer, uncomfortable but real, is that you cannot compete on raw labor costs. Europe has higher wages, more demanding regulations, and social standards that it is not willing to sacrifice. Nor should it. But that means the only way to remain competitive is to produce smarter, more efficiently, and with more added value per hour worked. This is exactly where robotics, automation, and the cutting-edge technologies we call "deep tech" come in.

Automation is not the enemy of employment. It is the condition for European jobs to survive in a globalized world. Factories that do not automate do not keep their jobs: they lose them, because they end up closing or moving to countries with lower costs. Those that do automate can keep production in Europe, with better-trained and better-paid workers who supervise and program systems instead of performing repetitive tasks.

Spain has innovative companies in robotics and automation that are competing—and winning—in international markets. This sector is in this paper because the European industry of the future is not built with cheaper hands: it is built with smarter technology.

1. Who We Are and What We Represent

Robotics, industrial automation, and deep tech form a technological ecosystem ranging from robotic arms assembling cars to artificial vision systems detecting defects

on a production line, as well as industrial drones, autonomous vehicles, and the software platforms that coordinate and optimize all those systems.

In Spain, the industrial automation and robotics sector moves around €5 billion annually and has grown at rates exceeding 10% in recent years. The most active companies are concentrated in the Basque Country, Catalonia, Madrid, and increasingly, in regions like Valencia and Galicia, where the manufacturing industry holds significant weight.

In this ecosystem, a new generation of Spanish companies is proving that it is possible to design, integrate, and deploy complete automation systems tailored to the specific needs of each industrial client. It is not just about selling robots: it is about analyzing a production process, designing the right robotic solution, and ensuring it works in the real-world environment of the factory or warehouse, not just in a lab.

The real challenge of automation in Europe does not lie with large corporations—which have been automating for decades— but with industrial SMEs, which represent the bulk of the Spanish and European productive fabric. These companies want to automate, but they have neither the budget nor the technical team of a multinational. Modular, accessible, and scalable solutions, designed specifically for this segment, are the key to ensuring that automation stops being a privilege of large-scale factories.

Javier Martínez García, founder of Odyssey Robotics and an expert in industrial robotics and automation with over ten years of experience in the design, manufacturing, and integration of robotic systems for industry and logistics, represents in this paper a new generation of Spanish tech entrepreneurs. They are not satisfied with just being customers of technology from abroad; they create it, develop it, and export it.

2. 2030 Sector Vision

By 2030, the European factory will have changed more in ten years than in the previous fifty. The combination of advanced robotics, Artificial Intelligence, digital twins—virtual replicas of physical processes— and the Industrial Internet of Things (IIoT) will have radically transformed manufacturing production.

Spain wants to be a protagonist in this transformation, not just a recipient. The goal is not only for Spanish factories to modernize—that is necessary but insufficient— but for Spain to develop and export the very technology used to modernize factories worldwide.

The sector envisions 2030 centered around four key pillars:

The autonomous factory. By 2030, many production lines will operate with minimal human supervision for repetitive and dangerous tasks. Collaborative robots (cobots) will work alongside operators on tasks requiring precision or strength, while AI optimizes production parameters in real-time. The result will not be less employment, but different employment: more technical, more skilled, and more creative.

Distributed automation. Today, advanced automation is concentrated in large automotive or electronics plants. By 2030, thanks to lower technology costs and more modular solutions, automation will have reached workshops, warehouses, agricultural cooperatives, and small factories across Spain. This democratization of technology is one of the sector's greatest challenges and opportunities.

Deep tech as a European competitive advantage. Cutting-edge technologies — quantum computing applied to industrial optimization, advanced materials, photonics, industrial biotech— will be the frontier where Europe can win the competitive battle against Asia and the United States. Spain has top-tier research centers and innovative startups in these fields that need the right bridge between the lab and the market.

Service robotics and new fields. Beyond industry, robotics will massively enter sectors such as logistics, agriculture, healthcare, and construction. Fruit-picking robots, hospital assistance systems, infrastructure inspection drones: Spain, with its strong agricultural, healthcare, and construction sectors, has a massive domestic market to test and scale these applications.

3. Current Challenges and Competitiveness Levers

The Challenges:

The first and most critical is access to early-stage financing. Developing robotics or deep tech requires years of intensive R&D before having a marketable product. Seed capital and early-stage investment rounds are insufficient in Spain compared to the American, German, or Israeli ecosystems. Many promising Spanish tech startups end up being acquired by foreign companies —or simply die— due to a lack of funding at the critical moment.

The second challenge is the gap between research and the market. Spain has universities and public research centers with top-tier technological capabilities. But the path from a scientific paper or a lab prototype to a sellable industrial product is long and expensive. Often, commercial viability isn't even considered when prioritizing research projects. Technology transfer mechanisms between academia and industry remain inadequate.

The third is specialized talent. Robotics engineers, control systems programmers, AI experts applied to industrial processes: demand far outstrips supply. Global tech giants from the US and Asia actively compete for this talent, often pulling it out of Spain or Europe altogether.

The fourth challenge is the cultural resistance to automation in segments of the business fabric. Many SME owners associate automation with unaffordable investments, uncertain returns, excessive technical complexity, or labor issues. Changing this perception —by proving that automation is accessible, profitable, and compatible with job security— is an ongoing pedagogical effort that needs more institutional backing.

The Levers:

The main lever is the public-private R&D ecosystem that Spain has built around centers like the CSIC, regional technological institutes, polytechnic universities, and science parks. This ecosystem provides a solid foundation for innovation if the bridges to the market are improved.

The second lever is the Spanish manufacturing industry as a testing ground. Automotive, food, textiles, ceramics, aeronautics: Spain has a diversified and demanding industrial base that can act as a reference customer for locally developed tech solutions, providing them with the credentials needed for export.

The third lever is the growing business awareness of the need to modernize. The pandemic, energy inflation, and competitive pressure have accelerated the willingness of many SMEs to invest in automation. The market is more receptive than ever.

4. Regulatory, Customs, and Trade Framework

The European regulatory framework for robotics and artificial intelligence is currently under construction, creating both opportunities and uncertainties for companies in the sector.

The European Artificial Intelligence Act —the AI Act, approved in 2024— establishes a framework for classifying AI systems by risk levels, with stricter requirements for high-risk applications, which include some industrial robotic systems. For companies in the sector, this means compliance and certification costs that must be integrated into product design from the very beginning. The upside is that a clear framework can become a **competitive advantage** against competitors from countries without equivalent regulations.

The Machinery Directive, currently being updated by the new Machinery Regulation, revises safety requirements for robotic and autonomous systems. Integrating cybersecurity as a machinery safety requirement —since an internet-connected robot is also a potential attack vector— is one of the most critical elements of this revision.

In terms of Intellectual Property (IP), protecting technological innovations remains a challenge. Patent processes are long, expensive, and have uncertain outcomes, especially for SMEs. In fields like robotic control software or AI algorithms, legal protection is more complex than for traditional physical inventions.

Regarding the export of dual-use technology —systems with both civil and military applications, such as many robotic and drone systems— the European and national export control framework is complex. This can act as a brake on the internationalization of companies that lack specialized legal teams.

5. Proposals to the European Commission

Proposal 1. Create a European automation program for manufacturing SMEs. The bulk of the European industrial fabric consists of SMEs that want to modernize but cannot afford the cost or complexity of massive automation projects. The Commission must articulate a specific program —with direct funding, technical advice, and access to certified integrators— to bring automation to mid-sized factories across Europe. The Digital Innovation Hubs model is the right foundation to build upon.

Proposal 2. Strengthen early-stage deep tech financing through the European Innovation Council (EIC). While the EIC is the right tool for deep tech startups, its resources are insufficient and its processes are too slow for the pace of technological innovation. More capital, more agile processes, and selection criteria that prioritize technological and market potential over academic indicators are needed.

Proposal 3. Establish a European framework for Innovative Public Procurement in robotics and automation. European governments and public administrations are major buyers of industrial and logistics services. By incorporating technological innovation criteria into their tenders —requiring automated, efficient, and sustainable solutions— they will create a lead market that drives the sector and provides European companies with reference contracts to compete globally.

Proposal 4. Simplify export controls for low-risk dual-use technology. The current export control framework penalizes many tech SMEs that lack the resources to navigate its complexity. Streamlining the process for low-risk technologies —using

digital procedures, fixed deadlines, and accessible public guidance— would unlock significant export capacity within the sector.

Proposal 5. Invest massively in specialized technical training in robotics and industrial AI. The talent bottleneck won't be solved just by attracting foreign talent; it must be solved by training more engineers, technicians, and programmers in Spain and Europe. The Commission should push for dual vocational training programs—in collaboration with sector companies— specifically targeted at Industry 4.0 skills: robot programming, systems integration, and advanced automation maintenance.

6. Final Message

Europe cannot win the 21st-century industrial race by producing cheaper than China. That battle is already lost. But it can win by producing smarter, more efficiently, and with more added value per euro invested.

Robotics, automation, and deep tech are the tools with which Europe can do exactly that. They are not a threat to employment: they are the guarantee that European industrial jobs have a future. Factories that automate stay in Europe. Those that don't, leave.

Spain has companies and entrepreneurs who are already building that future, technology in hand, client by client, factory by factory. What we need from the European Commission is for it to treat industrial automation as a strategic priority for Europe's competitive survival, not as a technological luxury for large corporations.

The time to act is now. Every year that passes without a clear European industrial strategy in robotics and automation is a year in which the Asian competitive advantage consolidates further. Technology advances. Competition does not wait. And Europe cannot afford to do so.

This sector connects with the next one —Sustainable Mobility and Future Automotive— because the car industry is, historically, the great laboratory of industrial automation. Car factories were the first to adopt robotics on a large scale, and today they are the most visible showcase of what Industry 4.0 can achieve. What Spanish robotics companies develop as solutions for multiple industries, the automotive sector applies in one of the most demanding and competitive environments in the world.

CONGRESS VOICE — Javier Martínez, Founder of Odyssey Robotics. Expert in Industrial Robotics and Automation

"Europe must regain technological sovereignty: hardware, software, and talent."

From the experience of having built a company in Spain to integrate robotic technology into industry and logistics —artificial vision inspection, autonomous vehicles, and custom robotic cells for top-tier clients— the structural dependency I observe is worrying: most components come from Asia, servers are in the US, and the AI that is currently bringing machines to life has its "brain" in locations outside Europe that aren't even always identifiable. When we tested using AI agents to give instructions without code and the machines responded, the result was extraordinary. But also unsettling: if AI programs for us, we stop learning how to program, and that is a silent, irreversible loss of technical sovereignty.

Added to this is the fact that universities, in an effort to maintain enrollment rates combined with a misinterpretation of universal accessibility, have reduced the required technical level, precisely when the market demands profiles with a deep understanding of systems. Europe is draining itself of technical leadership without realizing it. Machines and their technology were the core of that industrial leadership for decades. We cannot afford to lose it by handing control over to systems we neither control nor understand.

The solution is clear: a European open-source strategy, with source code access for everyone, contributed by everyone, ensuring control over our own technological tools over time, alongside local and sovereign computing and public, auditable AI models. Europe invests billions in data centers without certain returns, while delegating its processing and decision-making power to third parties. Regaining that technological sovereignty is not an option: it is a condition for industrial survival.

SECTOR 7 — SUSTAINABLE MOBILITY AND THE FUTURE OF AUTOMOTIVE

Keynote Speaker: SEAT & CUPRA | Julian Herwig, Head of International Relations and European Affairs *Block 2: Strategic Industry, Mobility, Logistics, and Technology*



SEAT S.A.

0. Reasons for selecting this sector

Almost everyone has owned a car in their life, or at least ridden in one. It is one of the most ubiquitous industrial products in the daily life of any European citizen. But behind every vehicle lies a massive industrial chain: designers, engineers, parts suppliers, assembly plants, dealerships, and workshops. All of this forms the automotive sector, one of the most important pillars of the European and Spanish economies.

And this sector is currently undergoing the deepest transformation in its history. It's not just about swapping a gasoline engine for an electric one. It's about completely rethinking how cars are designed, manufactured, sold, and used. Electrification, digitalization, connected driving, new consumer habits, and climate pressure are redrawing the rules of the game.

In Spain, automotive isn't just another sector: it *is* the sector. It contributes **10% of the national GDP** and **9% of the country's total employment**. We are the **second-largest vehicle producer in Europe** and the ninth in the world. What happens to the car industry in Spain has direct consequences for millions of families.

That is why this sector is in this paper. And that is why SEAT & CUPRA —the only car manufacturer that keeps its entire creation process in Spain, from design to sales— is the ideal company to represent it.

1. Who We Are and What We Represent

The automotive sector is not just about making cars. It is a complete value chain that starts with raw material and component suppliers, moves through manufacturers, and reaches all the way to sales, maintenance, and after-sales services. Together, this generates **3.5% of the gross value added** in the European Union —that is, the wealth

produced by the economy— and **7% of total employment**, translating into **13.2 million jobs**, of which 2.4 million are direct.

In Spain, the impact is even more pronounced: **58,000 direct jobs** and a contribution that is unparalleled by any other industrial sector in the country.

SEAT & CUPRA was born in 1950 as Spain's first major automotive company. Over more than 70 years, it has evolved from a local manufacturer into a global player within the **Volkswagen Group**, which it joined in 1986. In 2018, it took a step further by creating **CUPRA**, a brand that has conquered markets worldwide with its own bold identity, centering on design and performance as its key differentiators.

Today, SEAT S.A. has more than **13,000 direct employees**, is present in **over 70** countries, and **exports more than 80% of the vehicles it manufactures**. Its main markets are Germany, Spain, and the United Kingdom. Collectively, the company represents approximately **1% of the Spanish GDP**.

But what makes SEAT & CUPRA truly unique in the European context is something few companies in the world can say: **it is the only car manufacturer that carries out its entire creation process in Spain**. Design, research and development, production, and sales: it all happens here. This means that when SEAT & CUPRA innovates, it innovates in Spain. When SEAT & CUPRA creates high-quality jobs, it creates them in Spain. And when SEAT & CUPRA exports, it exports Spanish value to the world.

2. 2030 Sector Vision

The sector's big bet for 2030 has a clear name: **electrification with competitiveness**. And the goal is not just to sell electric cars, but to **turn Spain into the European hub for electric mobility** —the reference center where the vehicles of the future are designed, manufactured, and innovated.

SEAT & CUPRA is already taking concrete steps in that direction. Starting in **2026, new electric models will be manufactured at the Martorell plant in Catalonia**. This is not a promise: it is a real, already committed investment that anchors electric production on Spanish soil.

What does this mean for someone outside the sector? It means that the factory that for decades produced gasoline and diesel cars is going to start producing next-generation electric cars, competing directly with what China, Germany, or South Korea are manufacturing. And it's going to do it from Spain.

To make this leap possible and sustainable, the sector envisions 2030 based on three fundamental pillars:

Spain as an electric manufacturing hub. Not just assembling cars, but developing batteries, energy management software, digital driving platforms, and the entire value chain behind them. This requires investment, talent, and a regulatory framework that supports rather than hinders.

Charging infrastructure as an economic engine. An electric car without charging points is like a mobile phone without signal: useless. Developing a dense, reliable, and accessible charging network across Spain is not only necessary for citizens to buy electric cars; it is also a source of investment, jobs, and economic activity in itself. It is a key competitive lever.

Digitalization and AI at the service of the automobile. The car of the future is not just a non-polluting vehicle: it is a connected device that learns, updates, interacts with its environment, and offers digital services. AI and digitalization are also critical for the automotive industry of the future.

3. Current Challenges and Competitiveness Levers

SEAT & CUPRA's presentation at the TuComex Congress was very clear on this point: the sector faces serious challenges, but it also possesses real tools to tackle them.

Pillars of Freight Transport in 2030

The Challenges	Competitive Levers
 Geopolitics ▪ Tensions Global & Geopolitical Crises	 Technological Innovation ▪ Advanced Quality and Security
 Talent & Industry ▪ Lack of Technological Profiles	 Digitalization & AI ▪ Efficiency in Design and Production
 Consumer Change ▪ Less Ownership, More Shared Mobility	 Internationalization ▪ Expansion into Global Markets
 Costs & Energy ▪ High Production and Energy Costs	 Strategic Alliances ▪ Collaboration & Synergies
 Chinese Competition ▪ Rivalry with Chinese Manufacturers	 Charging Infrastructure ▪ Extensive Charging Point Network

■ Today
 ■ 2030 Goal

4. Regulatory, Customs, and Trade Framework

According to SEAT & CUPRA, this is one of the most critical points of the debate. European regulation can either be the sector's greatest ally or its biggest brake. Right now, there is too much complexity, too much uncertainty, and insufficient coordination.

SEAT & CUPRA's message is blunt: **we need a stable, predictable, and coordinated framework**. Companies make investment decisions with a 5, 10, and 15-year horizon. If the rules keep changing or if there is uncertainty about what will be required in 2027 or 2030, investments stall or move to other markets.

The sector points to three regulatory dimensions as priorities:

The European CO₂ emissions regulation sets extremely demanding targets for manufacturers: drastically reduce the average emissions of their fleet or pay massive fines. The sector does not dispute the climate goal but asks for realistic deadlines and for demand-side incentives to keep pace with supply. It is useless to manufacture electric cars if citizens cannot afford to buy them.

Trade agreements are fundamental for such an export-driven sector. Access to markets like India, Latin America, or Southeast Asia depends largely on the tariffs negotiated by the EU. Agreements create certainty and reduce costs that directly impact vehicle affordability. Likewise, when competitors benefit from agreements that European manufacturers lack, the disadvantage is immediate.

Entry barriers: tariffs, varying certifications in each market —meaning having to prove a car is safe differently in every country— and administrative requirements that multiply costs without adding real value. Simplifying and harmonizing all of this is a concrete and urgent demand from the sector.

5. Proposals to the European Institutions (*N.B. These concern topics for which legislative proposals already exist; therefore, the Commission is no longer the sole interlocutor*)

SEAT & CUPRA's presentation at the TuComex Congress identified a set of concrete regulatory needs:

Proposal 1. A realistic review of CO₂ regulations. European manufacturers support electrification as the primary path to decarbonizing transport. However, deadlines must be consistent with the actual speed at which demand, charging infrastructure, and the battery supply chain evolve. Penalizing manufacturers for not selling enough electric

vehicles when citizens cannot afford them or charge them is counterproductive. Increased flexibility and a direct link to real market indicators are needed.

Proposal 2. Use the "Made in Europe" concept to bolster the competitiveness of European industry. The European Commission's proposal to introduce local content requirements must level the international playing field.

Proposal 3. Framework the sector's regulation in a way that drives transformation. Various regulatory proposals (clean corporate fleets, the "Automotive Omnibus," etc.) must facilitate the harmonization of rules and reduce bureaucracy.

Proposal 4. Create a European battery industry. Batteries are the heart of the electric car and its most expensive component. Today, most are manufactured in Asia. Europe needs to build and support the development of its own battery industry through public backing and attractive investment frameworks.

6. Final Message

The Spanish and European automotive industry has done its homework. It has invested billions in the transformation toward the electric vehicle. It has developed the products, renovated its factories, and trained its teams. Electric cars are already on the market, ready to be purchased.

What is missing now is not in the factories: it is in the institutions. It is in a regulatory framework that supports demand, ensures all global players play by the same rules, and provides the long-term certainty needed to keep investments in Europe.

SEAT & CUPRA summarizes this with three ideas that are the heart of its message at this congress: **the industry has invested in the transformation. Electric vehicles are on the market. Now we need support through the regulatory framework.**

Spain can be the European hub for electric mobility. We have the factory, the talent, the brand, and the will. We only need the European Union to build the framework that makes it possible: intelligent regulation, trade agreements that open markets, and a decisive commitment to the European manufacturing industry as the foundation of our collective prosperity.

The electric car is not the future. It is already the present. The question is whether that present will be manufactured in Spain or somewhere else in the world. SEAT & CUPRA is very clear about where it wants that to be.

This sector connects with the next one —Internationalization, Strategy, and Economic Diplomacy— because everything we have seen so far —water,

energy, naval industry, ports, logistics, robotics, automotive— needs one thing to grow beyond Spanish borders: knowing how to internationalize. And that is precisely the specialty of TuComex, the organization that has made this congress possible and represents the voice of Spain's foreign trade strategy.

CONGRESS VOICE — *Julian Herwig, Head of International Relations and European Affairs at SEAT & CUPRA.*

"Europe needs the right regulatory framework to lead in electric mobility."

SEAT & CUPRA has established itself as a key player in the Spanish automotive industry, with an integrated structure covering design, development, manufacturing, and marketing, and a presence in over 70 countries. Its evolution within the Volkswagen Group and the drive behind CUPRA reflect a strategy focused on innovation and international positioning.

The transition toward electrification is already a reality: Martorell is moving forward with its industrial reconversion, Navarra is preparing new electric models, and Sagunto will be key in battery production. The investments are underway and place Spain in a prominent position within the European electromobility map.

The main challenge now is regulatory. The conditions for carrying out this transformation must align with actual market capacity and infrastructure development.

SEAT & CUPRA is committed to simplifying regulations, boosting demand, and strengthening the European value chain, consolidating "Made in Europe" as a competitive advantage in the global context.

BLOCK 3: GLOBAL PROJECTION

SECTOR 8 — INTERNATIONALIZATION, STRATEGY, AND ECONOMIC DIPLOMACY

Keynote Speaker: TuComex | Cristina Peña Andrés, CEO *Block 3: Global Projection*



0. Reasons for selecting this sector

We have spoken about water, solar energy, maritime fleets and technology, ports, trucks, robots, and electric cars. All these sectors have one thing in common: to truly grow, to have a real impact, and to avoid depending exclusively on the domestic market, they need to go out into the world. They need to export, establish international alliances, participate in global tenders, and ensure their products and services reach customers in other countries and continents.

But going out into the world is not easy. There are tariff barriers —taxes paid when crossing a border—, technical barriers —different regulations in each country that require product adaptation—, cultural differences, legal risks, and a regulatory complexity that can be overwhelming, especially for a medium-sized company without a large foreign trade department.

This is exactly where this sector comes in: internationalization, strategy, and economic diplomacy. In other words, all the knowledge, instruments, and networks that help a Spanish company cross borders successfully.

This sector is cross-cutting to all the others. It does not replace water technology, renewable energy, or robotics: it complements them, amplifies them, and projects them abroad. That is why it holds the first place in Block 3 — Global Projection. Because without internationalization, the other 14 engines of this paper stay at home.

And right now, with Europe redefining itself geopolitically, with new trade agreements under negotiation and the urgent need to reduce strategic dependencies, knowing how to project oneself abroad is not just a competitive advantage: it is a condition for survival.

1. Who We Are and What We Represent

Internationalization as a sector encompasses a broad ecosystem: specialized foreign trade consultancies, promotion agencies such as ICEX, chambers of commerce, export-oriented business associations, digital platforms for international market connection, lawyers specialized in international trade law, and experts in economic diplomacy—the intersection of politics, foreign relations, and business.

Spain is the fifth-largest exporting economy in the European Union. In 2023, Spanish exports of goods and services exceeded €600 billion. More than 60,000 companies export regularly, and tens of thousands more do so occasionally. Today, foreign trade represents more than 40% of the Spanish GDP, a figure that would have seemed impossible just three decades ago.

But behind those numbers lies a massive challenge: the majority of Spanish exporting companies are SMEs—small and medium-sized enterprises—facing an international environment that is increasingly complex, volatile, and demanding. They need support, knowledge, and networks to compete on a level playing field with companies from other countries that sometimes enjoy more powerful state backing.

TuComex is a leading Spanish firm in internationalization and global strategy. Its mission is exactly that: to accompany companies and professionals in their global projection, connecting them with international markets, opportunities, and networks, and serving as their voice before European institutions and international organizations.

Cristina Peña Andrés, its CEO, is not only a businesswoman: she is also a **European Commission EU Trade Champion**, a distinction awarded to individuals who actively contribute to promoting European trade and trade policy. This places her in a unique position: she speaks both the language of Brussels and the language of business, acting as a bridge between both worlds.

TuComex represents more than just a company in this paper. It represents the collective voice of all the sectors showcased in these pages: it is the connector, the amplifier, and the translator that makes it possible for Spain's 15 strategic engines to reach the European Commission with strength and coherence.

2. 2030 Sector Vision

TuComex's vision for 2030 is ambitious and clear: **Spain must be a strategic player within Europe—not a country that simply follows rules designed by others**, but one that actively participates in their creation and projects its industrial and technological capabilities to the world with strength and coherence.

By 2030, TuComex envisions and will work toward a **Spain with its 15 strategic engines well-positioned in global value chains**. This means not just companies that export products, but companies that influence standards, regulations, and agreements. It means that when the EU negotiates a trade agreement with India or Latin America, the Spanish water technology, electric automotive, or robotics industries are already taken into account because the preliminary work to put them on the map has been done.

This vision is built on three fundamental conditions:

Solid trade agreements. For a Spanish company to sell its products in markets like Mexico, Indonesia, or Saudi Arabia without facing prohibitive tariffs or impossible technical requirements, the EU needs to negotiate trade agreements that open those markets in a real and practical way. Spain, as a major exporting nation, must have an active voice in these negotiations.

Regulatory stability. A company that decides to internationalize makes a medium- and long-term bet: it hires, invests, and builds relationships. If rules change every two years—if a European regulation modifies export conditions or if a trade agreement is unexpectedly renegotiated—that company loses the foundation upon which it built its strategy. Regulatory predictability is, for the sector, an asset as valuable as, or even more than, tariff reductions themselves.

Trade policy aligned with business reality. This is one of the major problems TuComex clearly identifies: there is an enormous gap between the language of Brussels and the language of the factory or the office. European officials speak of "preferential origin provisions" or "carbon border adjustment mechanisms." Business owners speak of whether they can sell their product in a certain market and at what cost. This comprehension gap has real consequences: many companies do not take advantage of existing trade agreements simply because they do not understand how they work.

TuComex's ultimate goal for 2030 is for internationalization to stop being an individual adventure for each company **and become a true State policy**: coordinated, funded, strategic, and connected to Spain's collective interests in Europe and the world.

3. Current Challenges and Competitiveness Levers

The Challenges:

The first is the fragmentation of support and regulatory complexity. In Spain, there are dozens of agencies, programs, and instruments to support internationalization:

ICEX, chambers of commerce, regional promotion agencies, European funds, ICO lines, and European Commission programs. The problem is not a lack of support: it is that it is so fragmented and complex to navigate that many SMEs get lost before they can even take advantage of it.

The second challenge is geopolitical uncertainty. The world of 2026 is not the same as it was in 2015. The war in Ukraine, tensions between China and the United States, new tariffs from the US government, and international sanctions: all of this constantly reshuffles the map of opportunities for exporting companies. "Friendshoring" —the trend of prioritizing suppliers and partners from politically aligned countries— and "nearshoring" —bringing production closer geographically— are phenomena reconfiguring global value chains and forcing a constant rethink of strategies.

The third is the difficulty for companies to anticipate European trade policy. The European Commission negotiates agreements that take years to finalize, with massive impacts on specific sectors. However, many companies only learn about these agreements once they are signed, rather than when they can still be influenced. This disconnection between the European negotiating process and Spanish business reality is a systemic failure with real costs.

The Levers:

Spain possesses unique competitive advantages for internationalization that not all European countries can replicate.

The most powerful is the cultural and business connection with Latin America. Spain shares a language, history, legal culture, and business networks with 20 countries totaling more than 650 million people and rapidly growing economies. This connection is a strategic asset that no other European country possesses to the same extent, **making Spain the natural gateway for Latin American companies into Europe and vice versa.**

The second lever is the geographical position toward Africa. The African continent will be the great emerging market of the 21st century: over 1.4 billion people today, with an expanding middle class and enormous needs for infrastructure, energy, water, and technology. Spain, with its geographical proximity and historical ties to North and West Africa, has a starting advantage that must be exploited strategically.

And the third lever is our institutional position within the EU. Spain is the fourth-largest country in the EU and carries real weight in European institutions. Knowing how to use that weight —to lobby— i.e., to actively and effectively defend Spanish interests in Brussels in a coordinated way— is an area where Spain can and must improve.

4. Regulatory, Customs, and Trade Framework

The regulatory framework affecting internationalization is, by definition, the broadest and most complex of all the sectors in this paper: it encompasses EU free trade agreements, customs regulations, export controls, technical standards in each destination market, foreign investment regulations, intellectual property protection in third markets, and a long etcetera.

The EU currently has more than 40 trade agreements in force with third countries and regions. In theory, this should significantly ease the lives of Spanish exporters. In practice, the actual utilization of these agreements—that is, the percentage of companies that actually benefit from the negotiated reduced tariffs—is surprisingly low, especially among SMEs. The main reason is complexity: complying with rules of origin—proving that your product is "sufficiently European" to qualify for the reduced tariff—requires documentation, knowledge, and resources that many companies lack.

Technical barriers to trade are another major obstacle. Although tariffs have dropped significantly in recent decades thanks to international agreements, non-tariff barriers—differing safety regulations, specific labeling requirements, local certifications, and environmental standards—remain a real hurdle for many exports. Furthermore, these are harder to negotiate and eliminate than simple tariffs.

Uncertainty over the future of trade agreements in a context of rising global protectionism—new American tariffs, tensions with China, Brexit—adds an additional layer of complexity that exporting companies must manage, often without the necessary institutional support.

5. Proposals to the European Commission

TuComex brings to the Congress what it calls the "Voice of the Exporter": a set of concrete demands representing what Spanish companies need from European institutions to project themselves globally more effectively.

Proposal 1. Create regular mechanisms for structured listening to the exporting sector. Before the European Commission finalizes a trade agreement, the affected sectors must be able to provide their input systematically, not just through formal consultations that few companies are aware of. TuComex proposes permanent mechanisms—sectoral forums, working groups, digital platforms—that connect business reality with the European negotiating process. This should be complemented by constant monitoring of European proposals so that companies can anticipate changes rather than merely reacting to them.

Proposal 2. Trade agreements that open real markets and are easy to utilize.

Signing agreements is not enough; we must ensure that companies, especially SMEs, can actually use them. This requires simplifying origin certification procedures, translating the benefits of each agreement into concrete business language, and creating accessible advisory services for companies without specialized legal departments.

Proposal 3. Regulatory simplification, clarity, and coherence. European regulation affecting foreign trade must be simpler, more coherent, and stable. Currently, there are overlaps between rules, contradictions between regulations, and a bureaucratic burden that specifically penalizes smaller companies. A systematic review —similar to the "Omnibus" proposed by the automotive sector— aimed at reducing this burden without sacrificing sustainability and safety objectives would be a massive step forward.

Proposal 4. Support for high-added-value internationalization. Spain should not compete in low-cost exports; it must compete in technology, advanced services, Industry 4.0, and sustainable solutions. Internationalization support instruments — financing, guarantees, promotion— should be prioritized toward these high-value sectors, where Spain has real competitive advantages and where margins allow for the construction of sustainable, long-term commercial relationships.

Proposal 5. Recognize Spain as a key player in strategic sectors within European trade policy. The 15 engines presented in this paper —water, energy, naval industry, ports, logistics, robotics, automotive, satellites, biotechnology, and all others— must be explicitly recognized in EU trade policy as Spanish strengths deserving active institutional support. When the EU negotiates with a third country, Spanish water technology or the Spanish naval industry should be on the table as assets to be protected and promoted.

6. Final Message

Every sector in this paper has a story to tell, a technology to showcase, and a product to sell. But none of them can reach the global market alone. They need a trade policy that opens doors, a regulation that doesn't create unnecessary hurdles, and an institutional network that supports them when markets get tough.

This is what internationalization is: not just a company department, but a State policy. It is not a secondary activity, but a requirement for Spanish industry and technology to truly contribute to Europe's strategic autonomy.

European trade policy must listen to and project the voice of Spanish industry and technology. Spain has everything it needs to be a first-rate strategic partner for the EU in 2030. We only need Brussels to listen to us — and for us to reach Brussels with a united, clear, and powerful voice.

This sector connects with the next one —Satellites, Aerospace Defense, and Telecommunications— because a country's global projection in the 21st century doesn't just happen in diplomatic offices or trade fairs. It also happens in space. Satellites are now critical infrastructure for communications, security, and digital sovereignty. And Spain has companies operating in that space with their own technology. Integrasys is one of them.

CONGRESS VOICE — Cristina Peña Andrés, CEO of TuComex and EU Trade Champion

"Internationalization is not just another chapter of the Spanish economy: it is the necessary condition for our 15 strategic engines to become real levers of European autonomy, resilience, and influence."

TuComex does not represent a specific productive sector, but the meta-sector that connects them all. Its role in this Congress is to weave the narrative: to demonstrate that water, energy, defense, ports, logistics, robotics, automotive, and all the other engines only scale and become sustainable if they have foreign markets in which to grow. Without internationalization, the 15 engines stay at home.

Cristina Peña speaks from a unique position: as a European Commission EU Trade Champion, she serves as a real bridge between the language of Brussels and the language of the factory and the office. And she warns that this bridge has a massive crack. European officials talk about preferential origin provisions or carbon border adjustment mechanisms; business owners talk about whether they can sell their product in a specific market and at what cost. This comprehension gap has real consequences: many companies do not take advantage of existing trade agreements simply because they do not understand how they work.

The challenges are cross-cutting: fragmentation of support, regulatory complexity, geopolitical uncertainty, friendshoring, nearshoring, and the difficulty of anticipating European trade policy from the company level. The solution requires permanent mechanisms for structured listening to the exporting sector before agreements are finalized, better education on how to leverage them, real regulatory simplification, and explicit recognition of Spain as a strategic player in key sectors within EU trade policy. If European trade policy wants to be credible in 2030, it must listen to and project the

voice of Spanish industry and technology—not just as exporters, but as partners in defining the rules of the game.

SECTOR 9 — SATELLITES, AEROSPACE DEFENSE, AND TELECOMMUNICATIONS

Keynote Speaker: Integrasys | Pedro Antonio Ruíz, R&D Director & Customer Success *Block 3: Global Projection*



0. Reasons for selecting this sector

There are infrastructures that are not seen, but without which nothing works. Satellites are the most invisible and the most critical of them all. Military communications, air and maritime navigation, weather forecasting, crop monitoring from space, real-time financial transactions: all of this depends on objects orbiting thousands of kilometers above our heads that most citizens have never seen or even thought about.

Europe learned this the hard way when, following the invasion of Ukraine, the fragility of its satellite communication systems against external actors was exposed. The dependence on non-European space infrastructure during moments of geopolitical crisis revealed a strategic vulnerability that the Commission cannot ignore. Current geopolitics are uncertain and tense, and we need companies capable of sustaining a technological war and nurturing the business fabric of European defense forces and NATO.

Spain is today the fourth-largest contributor to the European Space Agency (ESA), having made a significant leap compared to previous years. With companies like Integrasys, Indra, GMV, or Sener, the country participates in Europe's most important space programs and exports aerospace technology to markets worldwide. The sector employs more than 15,000 highly skilled people and generates an annual turnover exceeding €1 billion, with an export ratio of over 60%.

The time to include it in this paper is now because space and defense are areas undergoing global explosion. By 2030, the IRIS² constellation will be connected and deploying technology to securely communicate European Ministries of Defense. Who manufactures that technology, who operates it, and who protects it is not a technical detail: it is a top-tier strategic decision.

1. Who We Are and What We Represent

The aerospace and satellite telecommunications sector in Spain ranges from the design and manufacture of components to the integration of complete systems, the operation of ground infrastructures, the development of signal management software, and the provision of monitoring and space cybersecurity services. It is a sector of extremely high technological intensity, characterized by long development cycles, high investments, and very high barriers to entry: exactly the type of industry where Europe can and must maintain sovereignty.

Integrasys is a Spanish software company with over 35 years of experience, specializing in intelligent solutions for satellite network automation and for clients in the satellite and defense industries. Headquartered in Madrid, with a presence in London, Luxembourg, Toulouse, Dubai, Jakarta, Sydney, and offices in the United States—along with a center of excellence in Kyiv, maintained even in the midst of conflict as a testament to its commitment to Ukraine and the European cause—Integrasys operates on a truly global scale. It allocates 35% of its turnover to R&D, has won 10 innovation awards in the last 10 years, and boasts a team of 100 highly specialized professionals.

Its solutions allow for the detection of interference, geolocalization of emissions, optimization of radio spectrum use, and the protection of satellite infrastructures against both technical and intentional threats.

In the words of Pedro Antonio Ruíz: Integrasys is the "ear" —signal systems for listening and geolocating— and is also working on integrating the "eye" —imaging systems for observation. This combination of signal intelligence and visual intelligence is exactly what modern defense systems need to make rapid decisions in high-uncertainty environments.

2. 2030 Sector Vision

By 2030, space will have ceased to be a domain reserved for superpowers to become an everyday, congested, and contested operational environment. The proliferation of low-earth orbit (LEO) satellite constellations will have radically changed the architecture of global communications. If Europe does not act with determination, it risks being a mere consumer of this infrastructure rather than a sovereign builder and operator.

The sector's vision for 2030 is built on three pillars:

IRIS²: Operational and European. The EU's secure satellite communications constellation must be fully deployed, connecting Ministries of Defense and

government structures with guaranteed encryption and sovereignty. This program cannot be born outdated or executed with the slowness of typical institutional processes. It requires speed and decisiveness.

"Soft" defense as a European specialty. Spain must lead the integration of defensive capabilities that do not destroy, but rather inform, anticipate, and protect: signal intelligence, cyber defense, geolocalization, and threat analysis through Artificial Intelligence. These are critical capabilities where Spanish technology is already competitive and where the advantage can be widened with the right institutional support.

Artificial Intelligence applied to decision-making in crisis environments. The speed at which threats are generated in the electromagnetic space exceeds human response capacity without technological assistance. Systems that combine signal collection, real-time analysis, and AI to recommend responses are the immediate future of space defense. Integrasys is already working at this frontier.

3. Current Challenges and Competitiveness Levers

The first challenge is geopolitics and supply chain tensions. A crisis in the Strait of Hormuz, tensions in Taiwan, or conflict in Europe can disrupt access to critical components for the space and defense industry. To be resilient, the sector needs crisis plans, agile information management, and the support of Artificial Intelligence to make rapid decisions in turbulent times.

The second challenge is dependence on third countries for critical technology. Europe buys too much weaponry and too much technology outside its borders. This dependency is not just economic: it is strategic. When tensions with the United States generate tariff uncertainty, European companies in the sector find themselves caught in the crossfire without the institutional backing they require.

The third challenge is talent and costs. Attracting and retaining young European talent in a demanding sector—adapting corporate culture to the values of new generations—while maintaining competitive costs against companies from economies with very different cost structures, is one of the most difficult balances to manage.

The levers are equally clear. Innovation is the primary one: Integrasys allocates 35% of its turnover to R&D and has won 10 awards in 10 years. This culture of sustained innovation is difficult to replicate and generates cumulative competitive advantages. Global presence—with offices on three continents and clients in the most demanding markets—is the second lever: it allows for the creation of local alliances, access to international tenders, and diversification of geographical risk. And the specialization in

"soft" defense —capabilities that inform and protect without destroying— is a differential advantage in a market where Europe is looking for exactly that profile.

4. Regulatory, Customs, and Trade Framework

The sector operates within one of the most complex regulatory frameworks in existence: ESA regulations, International Telecommunication Union standards for spectrum use, European legislation on the export of dual-use technology, and national defense regulations. The overlapping of these layers generates uncertainty and slows down processes that, in this sector, cannot afford to be slow.

The sector's demand to the European regulator is clear: more agility. Programs like IRIS² cannot be managed with the timelines of traditional institutional bureaucracy. If they are born technologically outdated, they lose their strategic value before even becoming operational. The Commission must create specific procedures for critical space programs that combine rigor with speed of execution.

Regarding export and import within the NATO framework, the sector needs more fluid and digitalized procedures. Asymmetries between member states in the implementation of the dual-use regime generate unfair competition within the EU itself. A Spanish company may encounter more obstacles to exporting certain technology than a French or German competitor, not for technical reasons, but due to differences in national frameworks.

Tariff uncertainty with the United States is another central concern. Europe must negotiate better so that sovereign European companies are institutionally nurtured, ensuring we do not depend exclusively on the purchase of foreign weaponry and technology. Finally, the sector calls for the active promotion of agreements between large companies and SMEs: real innovation in this sector often comes from smaller companies, which need the umbrella of large institutional contracts to scale.

5. Proposals to the European Commission

Proposal 1. Accelerate the deployment of IRIS² with agile execution procedures and European industrial content criteria that guarantee real participation from companies across all member states. A program that is born slow or outdated does not fulfill its strategic function. Execution speed is a core part of the program's value.

Proposal 2. Create a harmonized European framework for the export and import of dual-use technology within the NATO scope, featuring digitalized procedures

and maximum resolution times. Current asymmetries between member states penalize companies in countries with more restrictive implementations and must be eliminated.

Proposal 3. Actively negotiate with the United States to protect European defense technology companies from tariff uncertainty. Europe cannot allow its sovereign companies to be at a disadvantage compared to U.S. providers within its own defense markets.

Proposal 4. Establish mandatory collaboration mechanisms between large aerospace companies and innovative SMEs in European defense and space programs. Real innovation comes from SMEs; large institutional contracts must serve as the vehicle for that innovation to reach scale.

Proposal 5. Invest in attracting and retaining young European talent in the aerospace and defense sector, with specific training, mobility programs, and working conditions adapted to new generations. Without talent, technological sovereignty is impossible.

6. Final Message

Space is not the future. It is the present. Communications, navigation, security, and strategic intelligence already depend on orbital infrastructure today. The question is not whether Europe needs space sovereignty: it is whether it is going to build it in time.

Europe must be sovereign in defense, space, and cyber defense. Spain must be a European hub with defensive capabilities, information gathering, and intelligent analysis to make the best geopolitical decisions. With the right framework, Spanish companies are ready to lead that effort.

Spain has the companies, the talent, and the experience to contribute decisively to this sovereignty. Integrasys has been doing it quietly for 35 years, from Madrid to Kyiv, from Dubai to Sydney, winning in the world's most demanding markets with technology developed right here.

This sector connects with the next one —Technical Textile Industry for 360 Tourism and Sport— because Spain's global projection is not built only with satellites and frigates. It is also built with the quality, design, and sustainability of everything Spain exports to the world. From space to fabrics, Spanish manufacturing excellence takes many forms. Todo a Medida represents the one that dresses the premium tourism experience.

CONGRESS VOICE — Pedro Antonio Ruiz, R&D Director at Integrasys

"European autonomy depends on controlling the satellite spectrum and protecting our communications."

Integrasys started with 15 people. Today they are 100, with a presence on three continents and 35% of their turnover dedicated to R&D. During the 2008 crisis, they made a decision that changed everything: to internationalize. They went from 20% international activity to 95% today. Outside of Spain, their potential was recognized early on, integrating their products and patents into US platforms. This is a European company that competes and wins in the most demanding markets in the world with technology developed here.

Their specialty is the satellite spectrum: detecting interference, geolocating emissions, and protecting critical communication infrastructures. When Sputnik was launched, there were very few satellites. Today there are 20,000, and soon there will be 50,000. Managing that spectrum is a matter of sovereignty. If space signals go dark and GPS fails, the impact would be worse than a power outage.

Today, the development of testing centers is critical, such as those in Kyiv, where they continue to work on electronic warfare and satellite communications under real combat conditions.

The Spanish Space Agency needs more financial muscle and a swift deployment of IRIS².

BLOCK 4: LIFE AND CONSUMPTION

SECTOR 10 — TECHNICAL TEXTILE INDUSTRY FOR 360° TOURISM AND SPORT

Keynote Speaker: Todo a Medida | Sergio A. Manzano Plaza *Block 4: Life and Consumption*



0. Reasons for selecting this sector

When we think of strategic European industry, we rarely think of the **textile industry**. And yet, textiles in all their forms —technical, thermal, etc.— represent one of the sectors where Europe maintains a real competitive advantage over Asia: not in volume or price, but in innovation, design, sustainability, and customization. It is exactly the kind of industry Europe needs to promote if it wants to compete in the 21st century by leaning into its strengths, not its weaknesses.

Spain has a solid textile manufacturing tradition. Upon this foundation, it has built a network of companies specialized in high-value-added solutions for demanding sectors: premium tourism, high-performance sports, exterior and interior textile architecture, and corporate spaces. This is not mass-production textiles. This is the textile industry that dresses grand hotels, equips luxury resorts, personalizes sports team uniforms, and designs spaces where the customer experience begins before anyone says a word.

Tourism is Spain's leading export sector, with more than 85 million visitors in 2023 and a contribution to GDP exceeding 12%. Technical textiles are an invisible but essential part of that experience: from thermal and fire-retardant fabrics in hotels to tension membranes installed in major football stadiums. All of this is Spanish manufacturing industry with international projection.

The time to include it in this paper is now because the reconfiguration of global supply chains —with nearshoring gaining ground— opens a real opportunity for sustainable Spanish and European technical textile production to regain market share from low-cost Asian production.

1. Who We Are and What We Represent

The Spanish technical textile sector encompasses a diverse set of companies specialized in manufacturing fabrics and textile solutions with specific performance features: fire resistance, waterproofing, antimicrobial properties, extreme durability, and the integration of technology into the fabric. It is not fashion in the conventional sense. It is engineering applied to materials.

In the subsector oriented toward tourism and sport, Spain has companies working for international hotel chains, top-tier sports facilities, cruise ships, resorts, and premium leisure spaces in markets as demanding as the Caribbean, the Persian Gulf, Southeast Asia, and Central Europe. The combination of design, functionality, and customization is the value proposition that distinguishes these companies from Asian competitors who dominate volume but not complexity.

Todo a Medida is a Spanish company specialized in customized textile solutions for the tourism and sports sectors. Its proposal integrates design, technical manufacturing, and service: from product conceptualization to final delivery, including material selection, adaptation to market-specific regulations, and international project management. It works with boutique hotels and major chains, sports facilities, and interior architecture projects where textiles are a central element of the space's identity.

What makes Todo a Medida representative is not just what it manufactures, but how it does it: with a project logic rather than a catalog logic. Every solution is different because every client has different needs. This capacity for customization at scale is difficult to replicate and is exactly what premium markets demand.

2. 2030 Sector Vision

By 2030, technical textiles for tourism and sports will have completed a transformation placing them at the intersection of three major trends: the digitalization of manufacturing, sustainability as a standard, and customer experience as the engine of innovation.

The sector envisions this horizon structured around four pillars:

End-to-end digitalization: 3D design, advanced manufacturing with digital quality control, and complete product traceability from raw material to the final customer.

Sustainability as a value proposition, not a regulatory obligation: recycled materials, low-impact production processes, and real circularity with systems for collecting and reusing fabrics at the end of their life cycle.

Innovation in smart materials: fabrics with active properties —thermoregulation, moisture management, sensor integration— that add functionality to the user experience.

Proximate European production as a competitive advantage: shorter lead times, greater quality control, a smaller logistical carbon footprint, and the ability to respond rapidly to changes in demand.

In this map, Spain aims to be the European benchmark in textile solutions for premium tourism and high-performance sports: the country where the products desired by the world's best hotels, resorts, and sports facilities are designed and manufactured.

3. Current Challenges and Competitiveness Levers

The first challenge is the dependence on external raw materials. High-performance technical fibers —special polyesters, certified recycled fibers, materials with advanced functional properties— are mostly produced outside Europe. This dependence creates vulnerability to supply chain disruptions and limits the ability to control complete product traceability.

The second is the increase in industrial costs. Energy, logistics, and labor have significantly increased the cost of European production in recent years, narrowing margins in a sector where Asian competition continues to press on price. Companies that have not sufficiently differentiated their value proposition feel this pressure with particular intensity.

The third is price-based international competition. China, Bangladesh, and Vietnam can produce textiles at costs Europe cannot match. The only sustainable response is not to compete on that ground: moving up the value chain toward customization, innovation, and certified sustainability.

The competitive levers are clear:

Innovation and design are the first: Europe —and Spain within it— has a creative and technical capacity that Asian competitors cannot easily replicate.

Certified sustainability is the second: premium markets increasingly demand verifiable environmental credentials, and European companies already working with recycled materials and clean processes have a head start.

Proximity is the third: manufacturing close to the final customer reduces deadlines, allows for greater customization, and creates a collaborative relationship that builds loyalty.

4. Regulatory, Customs, and Trade Framework

European regulation is moving in the right direction. The Ecodesign Regulation, the EU Strategy for Sustainable Textiles, and the requirements for traceability and digital labeling of textile products establish a framework that rewards those already working with sustainability criteria and penalizes those still stuck in the "throwaway" model. For companies like Todo a Medida, which already operate with this logic, **regulation is a competitive advantage, not a burden.**

The main regulatory challenge lies in adapting standards for SMEs. Material certifications, sustainable reporting requirements, and specific technical standards for each destination market —especially in the hotel industry, where fire safety, antimicrobial, and durability regulations vary by country— generate **compliance costs that weigh disproportionately on smaller companies.**

On the commercial front, **EU agreements with key markets for premium tourism** — the Caribbean, the Persian Gulf, Southeast Asia— are fundamental to facilitating access for specialized textile companies to these markets. Tariff barriers are often lower than **non-tariff barriers:** local approvals, specific certification requirements, and preferences for local suppliers in tenders for large hotel projects.

5. Proposals to the European Commission

Proposal 1. Develop a European sustainable and quality technical textile seal to serve as a market passport for exporting companies. An internationally recognized standard certifying European origin, verified sustainability, and technical quality would open doors in premium markets where provenance and environmental credentials are key decision criteria.

Proposal 2. Include technical textiles in European programs supporting reindustrialization and nearshoring. Proximate technical textile production contributes to European industrial autonomy, reduces dependence on Asia, and generates skilled manufacturing employment.

Proposal 3. Simplify access for textile SMEs to the technical certifications and standards required in destination markets. A European certification advisory

service —especially for markets with specific requirements in the hotel and sports sectors— would reduce entry barriers and multiply the exporting capacity of smaller companies.

Proposal 4. Incorporate textile sustainability clauses into trade agreements with premium tourism destination countries. Agreements with Gulf countries, the Caribbean, and Southeast Asia must facilitate access for European providers of sustainable technical textiles to large hotel projects funded by public or semi-public investment in those markets.

Proposal 5. Promote innovative public procurement programs in the European tourism and sports sectors that prioritize providers meeting sustainability, local production, and verified traceability criteria. Major international sporting events organized in Europe —such as the Olympic Games, European Championships, or World Cups— are an opportunity to create public references that drive the internationalization of the sector.

6. Final Message

Technical textiles are not a secondary sector of the Spanish economy. It is the industry that dresses the premium tourism experience, equips high-performance sports, and demonstrates that manufacturing in Europe with quality, design, and sustainability is not a utopia, but a viable and competitive business model.

Spain can be the European benchmark in textile solutions for the world's most demanding markets. We have the design, the technical capacity, and the export vocation. What we need is the strategic recognition that this sector matters, along with the regulatory and trade framework that allows it to compete on a level playing field.

For Spanish technical textiles to contribute fully to **EU industrial autonomy** and European leadership in high-value tourism and sports, we need a European sustainable quality seal, financial instruments adapted to SMEs, and trade agreements that open the markets where our clients build their finest projects.

This sector connects with the next one —Natural Stone, Ceramics, and Architecture— because technical textiles and surfacing materials share the same space: the interiors of grand hotels, luxury resorts, and top-tier sports facilities. What Todo a Medida provides for fabrics, Porcelanosa provides for floors and walls. Together, they define the material identity of the spaces where Europe exports its experience.

CONGRESS VOICE — Sergio A. Manzano Plaza, CEO of Todo a Medida

"European competitiveness will come from design, sustainability, and differentiation—never from price."

In a sector where competing on price with Asia is a losing battle, Todo a Medida has built its proposal in the opposite direction: design, sustainability, and customization for the most demanding markets. Their client is not looking for the cheapest supplier; they are looking for the one who understands their project and guarantees quality in every delivery.

Their vision for 2030 is practical: investing in R&D, incentivizing talent, and committing to projects that combine functionality with real sustainability. They are already working on water harvesting on rooftops and integrated solar panel installations for tourism and sports projects, always analyzing the return on investment (ROI). Sustainability is not a slogan: it is an economic decision that must make sense for the client.

What the sector needs is strategic recognition, financial instruments tailored to SMEs, and a European sustainable quality seal that turns European origin into a commercial advantage, rather than just a compliance cost.

SECTOR 11 — NATURAL STONE, CERAMICS, AND ARCHITECTURE

Keynote Speaker: Porcelanosa Grupo | Alfonso Muñoz Candela, International Business Development. *Block 4: Life and Consumption*

PORCELANOSA

0. Reasons for selecting this sector

Spanish ceramics are not just a product. They are an industry. It is one of the oldest, most export-oriented, and technologically transformed sectors of the Spanish economy—one that has successfully turned a centuries-old tradition into 21st-century industrial vanguard.

Spain is the European leader and one of the three largest global producers of ceramics. The Castellón cluster concentrates the highest density of ceramic manufacturers, suppliers, technology centers, and innovation in the world. What is designed and manufactured there ends up in the grand hotels of Dubai, the hospitals of New York, the facades of Shanghai skyscrapers, and the most ambitious architectural projects on the planet.

This sector is included in this paper because it is a perfect example of what Europe can and must be in the global economy: not the cheapest manufacturer, but the most innovative, the most sustainable, and the highest quality. Spanish ceramics compete with China, India, and Brazil not on price—that battle is lost from the start—but on design, technology, durability, and certified sustainability. And they win.

The time is now because the green transition and the industrialization of construction open a massive window of opportunity for materials like ceramics: durable, recyclable, hygienic, and possessing a low environmental footprint. If Europe wants to build sustainably, Spanish ceramics have a great deal to contribute. Porcelanosa, present in over 150 countries with more than 1,000 stores and showrooms, is the most authoritative voice to say so.

1. Who We Are and What We Represent

The Spanish ceramic sector encompasses the manufacture of floor and wall tiles, architectural solutions, bathroom equipment, and advanced construction materials. It is a sector intensive in technology, design, sustainability, and digitalization—key to the competitiveness of European construction and with an export presence that makes it one of the major contributors to the Spanish trade balance.

In figures, the Spanish ceramic sector generates more than 20,000 highly skilled direct jobs, has an annual turnover of over €4 billion, and exports nearly 70% of its production. Its geographical concentration in Castellón—with more than 150 manufacturing companies within a 50-kilometer radius—generates economies of scale, specialized supplier ecosystems, and a collective innovation capacity that is difficult to replicate anywhere else in the world.

Porcelanosa Grupo was founded in 1973 and is today a world benchmark in ceramics, construction solutions, bathroom and kitchen equipment, sintered stone, and technical surfaces. Its presence in more than 150 countries, with over 1,000 of its own stores and showrooms, makes it one of the Spanish companies with the greatest real international projection. It does not export through distributors: it has direct presence in the most demanding markets in the world.

What makes Porcelanosa unique is its capacity for applied innovation: XTONE—its line of large-format sintered stone—, KRION®—its solid surface material with antibacterial properties—, 3D printing applied to ceramics, and ventilated facade systems are innovations developed in Spain that have redefined what a ceramic material can do. This combination of industrial tradition and technological vanguard is exactly what this paper needs to represent.

2. 2030 Sector Vision

By 2030, the Spanish ceramic sector will have completed a double transformation: the decarbonization of its production processes and the comprehensive digitalization of its value chain. This is not merely a response to regulation, but a competitive advantage built before regulation demands it. The vision is structured around three pillars:

Real industrial decarbonization: electric and hybrid kilns, the integration of green hydrogen into firing processes, CO_2 capture in the most intensive facilities, and the progressive replacement of natural gas as the primary fuel. The ceramic sector is one of the most energy-intensive in Spanish manufacturing; therefore, its energy transformation is both a climate necessity and a long-term competitiveness opportunity.

End-to-end digitalization: digital twins of production plants, advanced automation, full product traceability from raw material to the end customer, intelligent logistics, and digital design integrated with the BIM (Building Information Modeling) tools used by architects and builders worldwide.

Consolidation of Spain as the European hub for ceramic innovation: leading the development of new materials, the industrialization of construction through modular systems and ventilated facades, applied sustainability using recycled content materials, and the export of complete solutions, rather than just products, to the most demanding markets in the world.

3. Current Challenges and Competitiveness Levers

The first challenge is energy volatility. The ceramic sector is gas and electricity intensive: kilns operate at temperatures exceeding 1,000°C continuously. The volatility of gas prices since 2021 has directly impacted the sector's margins and accelerated the need for energy diversification. The transition toward electric kilns and green hydrogen requires massive investments that not all companies can undertake without financial support.

The second challenge is non-EU competition with lower environmental requirements. Chinese, Indian, and Brazilian producers compete on price with products that do not meet European standards for sustainability, safety, and quality. When these products enter the European market without the same requirements imposed on local manufacturers, it creates unfair competition that erodes the position of European industry.

The third challenge is internal regulatory fragmentation. The coexistence of European regulations with additional national certifications generates duplications, extra costs, and barriers to intra-European trade that paradoxically penalize European manufacturers more than those from outside the EU.

The levers are equally solid. Material innovation is the first: XTONE, KRION®, and Porcelanosa's technical surfaces are examples of products that have no equivalent in low-cost markets. Consolidated internationalization is the second: decades of direct presence in premium markets have generated a commercial network and brand reputation that constitute a massive strategic asset. And certified sustainability is the third: ceramics are durable, recyclable, and hygienic materials that fit perfectly into the sustainable construction narrative dominating high-value European and global markets.

4. Regulatory, Customs, and Trade Framework

The European regulatory framework has enabled great economic and social progress, guaranteeing technical, environmental, and safety standards that provide a real competitive advantage for European industry in global markets. The problem is not European regulation itself: it is its fragmented implementation and the coexistence of additional national regulations that multiply compliance costs without adding real value.

Concrete examples: Specific product certifications exist in certain EU countries that establish their own approval requirements based on harmonized standards, yet maintain criteria that differ in certain aspects, making them unique and independent from the criteria established by EN and ISO standards. Regarding specific standards for determining slip resistance and the criteria for choosing safe flooring based on the installation site, even though efforts have been made to unify slip resistance determination into a single European standard, it is actually a compendium of four different standards used with varying frequency depending on the country.

In Germany, for example, the ramp method for shod and bare feet is used; in Spain, the pendulum with soft rubber (IHRD 55) is used, which differs from the standard used in the UK; and finally, a method known as the determination of the dynamic coefficient of friction via tribometer, which became popular in Italy a few years ago. Four methods within a single standard with different results and different requirements. These non-harmonized requirements hinder competitiveness, reduce the choices available to European consumers, make the expansion of innovative products difficult, and slow down the progress of the internal market.

On the external trade front, the sector detects a fundamental asymmetry: European products must comply with costly and slow approval processes in third markets, while products from those same markets enter Europe with insufficient controls. Trade agreements must incorporate **mutual recognition mechanisms** to facilitate the entry of certified European products into strategic markets and must demand reciprocity in quality and sustainability standards for products entering the European market. Following this line, recent examples of process and product audits that **Porcelanosa Grupo** has had to pass in order to export include those required by **Indonesia, Vietnam, China (CCC), Thailand, Malaysia, Nigeria, and Saudi Arabia.**

5. Proposals to the European Commission

Propuesta 1. Create a single European registry for companies certified under ISO, EN, and European regulations, eliminating the need for duplicate national certifications. This model could be inspired by the European public tender mechanism,

which removed 80% of administrative red tape. A product certified in Europe must be sellable across all of Europe without additional procedures.

Propuesta 2. Establish a differentiated and more demanding mechanism for non-EU products, requiring mandatory certification of European standards before gaining access to the internal market. A level playing field is not protectionism: it is the minimum condition for fair competition. European producers cannot compete with one hand tied behind their regulatory backs.

Propuesta 3. Promote trade agreements with direct approval clauses for European products already certified, when European standards are more rigorous than local ones. Facilitating the entry of Spanish ceramics into markets such as the United States, Japan, Saudi Arabia, Southeast Asia, or the Gulf countries would reduce the **non-tariff barriers** that today represent the greatest obstacle to the sector's international expansion.

Propuesta 4. Develop specific European programs to support the energy transition of the ceramic sector: electrification of kilns, integration of green hydrogen, \$CO_2\$ capture, and industrial digitalization. The decarbonization of the ceramic industry is technically possible but financially demanding. Without institutional support, the pace of transformation will be insufficient to meet European climate goals.

Propuesta 5. Create a single European digital window for technical and customs procedures in the manufacturing sector, integrating certifications, declarations of conformity, customs formalities, and sustainability requirements into a single point of access. Administrative simplification is not a luxury: it is a condition for the competitiveness of SMEs in the sector.

6. Final Message

Spanish ceramics have spent decades demonstrating that manufacturing in Europe with quality, design, and innovation is not only possible: it is profitable and competitive in the world's most demanding markets. Porcelanosa does not compete with China on price. It competes with everyone on value, and it wins.

However, this model requires a level playing field. A regulation that protects standards without fragmenting the internal market. Trade agreements that open doors instead of creating obstacles. And institutional support for the energy transition that allows for decarbonization without destroying competitiveness.

For the ceramic sector to contribute fully to the strategic autonomy of the EU, we need truly harmonized regulation that drives innovation, eliminates internal barriers, and allows us to compete on equal terms in the global market.

Spain can be the European hub for advanced ceramics if the EU commits to intelligent regulation, a viable energy transition, and trade agreements that recognize the real value of European quality.

This sector connects with the next one —Bioeconomy and Sustainable Agriculture— because the materials we build with and the food we nourish ourselves with share the same challenge: producing more with less impact, greater sustainability, and higher added value. What Porcelanosa does with clay and stone, Biorizon Biotech does with biomass and natural resources.

CONGRESS VOICE — Alfonso Muñoz Candela, International Business Development at Porcelanosa Grupo

"Europe needs real technical harmonization to compete globally on a level playing field."

Porcelanosa sells quality, design, innovation, and industrialization. They go far beyond tiles: technical surfaces, ventilated facades, and advanced materials. 99% of their waste is recycled, and they operate with solar energy and their own water treatment plant. They are the prime example that manufacturing in Europe with quality and sustainability is a viable and competitive model.

Alfonso Muñoz, who is also a jurist and a staunch pro-European, issues a clear warning: the European economy is slowing down compared to the US or China, but the EU's social cohesion index is the highest in the world. That is our strength. What we must eliminate are the "terrible ten": duplicate national certifications and the lack of harmonization that penalize European manufacturers more than non-EU competitors. He also stresses the massive impact of transportation, noting how shipping freights to the US surged from \$2,500 to over \$10,000, skyrocketing their logistical costs.

His proposal is concrete: reinforced automatic technical recognition, a non-duplicity clause, and a European digital registry of documents. A product certified in Europe must be sellable across all of Europe without additional procedures.

SECTOR 12 — BIOECONOMY AND SUSTAINABLE AGRICULTURE

Keynote Speaker: Biorizon Biotech | Sergio Aguilar Roig, General Manager. *Block 4: Life and Consumption*



0. Reasons for selecting this sector

Europe eats. And to eat, it needs to produce. This elementary statement hides a massive strategic complexity that the war in Ukraine, the fertilizer crisis, and climate pressure have brutally highlighted in recent years.

European agriculture is not just an economic sector. It is the foundation of food autonomy for 450 million people, one of the few sectors capable of anchoring population, income, and political stability in territories that would otherwise be emptied, and a primary export vector: in 2024, EU agri-food exports reached a record 235.4 billion euros, with a positive trade balance of 63.6 billion.

Spain occupies an exceptional position on this map. With more than 25% of the EU's fruit and vegetable production, over 27.5 million tons produced in 2024, and exports exceeding 20 billion euros, Spain is the leading community exporter in the sector. This is not a minor fact: it is a strategic position that defines Europe's ability to feed itself with less external dependence.

Biorizon Biotech, based in Almería, represents in this paper something more than a biotechnology company. It is an example of how Spanish science can solve some of the most urgent problems of European agriculture: producing more with fewer inputs, reducing dependence on imported fertilizers, and doing so with technology developed here, in Europe, using microalgae cultivated in one of the most demanding environments on the continent.

1. Who We Are and What We Represent

In 2024, the Spanish agricultural sector generated a gross added value of €40.491 billion, equivalent to 2.5% of GDP, and supported 680,200 full-time equivalent jobs. Within it, plant production —especially fruits and vegetables— is the main engine, with an exporting capacity unparalleled in Western Europe.

However, this sector is not included in this paper solely for its current economic weight. It is included because, by 2030, European agricultural production will be a first-order strategic sector: one of the pillars of the EU's material autonomy in an environment of geopolitical tensions, trade fragmentation, climate pressure, and growing competition for resources such as water, arable land, and agricultural inputs.

Biorizon Biotech is a multinational biotechnology company based in Almería, a global pioneer in the production, development, and marketing of biostimulant and bioprotection products for agriculture, based on microalgae and other microorganisms. It was the first company in the world to internationally market a microalgae-based biostimulant, making it a global reference in a rapidly growing market.

Biostimulants are products that improve the physiological efficiency of crops: they increase yield, improve the quality of the final product, and allow for a reduction in the use of chemical fertilizers and pesticides. A major meta-analysis involving over 1,000 comparisons and 180 studies found an average yield increase of 17.9% with their use, with the effect being greatest in vegetables—exactly the subsector where Spain is the European leader—with an increase of 22.8%. In arid climates and soils with low organic matter, the effect is even more pronounced. Almería, where Biorizon operates, is the perfect natural laboratory for developing and testing these technologies.

2. 2030 Sector Vision

By 2030, European agriculture will have made a qualitative leap driven by five simultaneous transformations that Biorizon and the sector as a whole consider unavoidable.

First: Biotechnology as the production standard. Biostimulants based on microalgae, beneficial bacteria, and plant extracts will cease to be niche alternatives and become standard tools in professional European agriculture. The Commission aims to reduce nutrient losses by at least 50% and fertilizer use by at least 20% by 2030. Biostimulants are the most efficient lever to achieve this without sacrificing yield.

Second: Digitalization and Artificial Intelligence applied to the field. This includes precision agriculture, task automation, full farm-to-table traceability, intelligent water and nutrient management, and early warning systems for pests and diseases. Spain, with its leadership in fruit and vegetable production, has a massive incentive to lead this digitalization.

Third: Food security as a geopolitical axis. European dependence on imported plant protein, fertilizers of Russian origin, or seeds controlled by a handful of non-European

multinationals is a vulnerability that 2030 cannot afford to ignore. Reducing these dependencies is as strategic as reducing energy dependence.

Fourth: The revaluation of Spanish production in global markets, with greater food technology, better product processing at the source, and increased bargaining power for producers against distributors.

Fifth: Spain as a key node for European food independence. The country that ensures Europe can consume high-quality fruits and vegetables without relying on third countries that do not apply the same sanitary and labor standards.

3. Current Challenges and Competitiveness Levers

The first challenge is geopolitical dependence on strategic inputs. Nitrogen fertilizers depend on natural gas; phosphorus and potassium are imported from a very small number of countries; and seeds are controlled by a few non-European multinationals. A crisis in any of these links has direct consequences for European food production. Biotechnology —and biostimulants in particular— is one of the most effective responses to this dependence because it reduces the amount of external inputs required per unit of production.

The second challenge is the availability of water and arable land. Spain is already experiencing severe water restrictions in its main production areas. Climate change will worsen this situation. Technologies that improve Water Use Efficiency (WUE) and Nitrogen Use Efficiency (NUE) are priorities, and microalgae biostimulants have proven effects on both metrics.

The third challenge is attracting innovative talent to the sector. Artificial intelligence, robotics, genetics, and microbiology applied to agriculture require profiles that currently prefer other sectors. Improving the image and conditions of the agricultural sector as a space for technological innovation is a priority that requires both business and institutional action.

The levers are equally clear:

Biotechnological innovation is the first: Biorizon is proof that Spain can lead globally in this field from Almería. **Trade agreements that protect Spanish production** against competitors with lower standards are the second. **University and vocational training oriented toward the agriculture of the future** is the third lever to build the talent the sector needs.

4. Regulatory, Customs, and Trade Framework

The European regulatory framework for agriculture is moving in the right direction, but at a speed that does not always keep pace with innovation. The European Biostimulants Regulation —included in Regulation (EU) 2019/1009— represented a significant step forward by establishing a specific category for these products; however, registration processes remain slow and costly, especially for products based on living organisms like microalgae.

The lack of agility in mutual recognition processes for agricultural inputs within the EU is one of the primary frictions highlighted by the sector. A biostimulant registered in Spain cannot be automatically marketed in France or Germany: it must undergo additional national processes that duplicate costs and slow down commercial expansion within the internal market.

On the customs front, the most serious asymmetry is the entry into the European market of food products treated with substances or active ingredients not approved in the EU. Spanish producers compete under very demanding sanitary and labor standards against imports that do not meet them. This is not free trade: it is institutionalized unfair competition.

Trade agreements must incorporate mirror clauses that require imported products to meet the same sanitary, environmental, and labor standards demanded of European producers. Without this reciprocity, European regulation effectively penalizes its own farmers.

5. Proposals to the European Commission

Proposal 1. Streamline and simplify the registration of biostimulants and bioprotectants in the EU, reducing times and costs for products based on microorganisms and natural extracts of European origin. Biotechnological innovation cannot wait years to reach the market. The time and cost of registration must be adjusted to the sector's reality.

Proposal 2. Establish effective customs control requiring imported food products to meet the same sanitary and input requirements applied to European production. Foods treated with substances not approved in the EU must not enter the European market. Reciprocity in standards is a condition for fair competition.

Proposal 3. Boost research grants in biotechnology, genetics, and robotics applied to agriculture, with specific lines in **Horizon Europe** for the development of biostimulants, biofertilizers, and bioprotection solutions of European origin that reduce dependence on external inputs.

Proposal 4. Develop a favorable fiscal policy for the agricultural sector that recognizes its essential and strategic nature, including incentives for using sustainable technologies, support for access to agricultural insurance, and producer grouping systems that improve their bargaining power against large distributors.

Proposal 5. Accelerate the mutual recognition of agricultural inputs within the European internal market. A product registered in one Member State under European standards must be sellable throughout the EU without additional national processes. Internal market fragmentation especially harms innovative SMEs that lack the resources to multiply registration processes country by country.

6. Final Message

European agriculture is a global benchmark for how we want to feed the world: with quality, sustainability, and respect for the health of people and the planet. This model requires investment, institutional support, and the recognition that producing food sustainably in Europe is not a cost: it is an investment in autonomy, stability, and the kind of world we want to build.

The agricultural sector is an engine of wealth and stability for European society. For it to contribute fully to the EU's strategic autonomy, we need agile regulation that keeps pace with innovation, trade agreements that demand reciprocity in standards, and a decisive commitment to European biotechnology as the lever for the sustainable agriculture of the future.

Biorizon Biotech demonstrates that Spanish biotechnology can lead globally from Almería, turning microalgae into solutions that reduce inputs, increase yields, and make agriculture more resilient to climate change.

This sector connects with the next one —Biotechnology and Natural Health— because the same science that improves crops can improve human health. The microalgae that Biorizon applies to agriculture have "cousins" in the world of functional health and natural supplements that companies like Hifas da Terra bring to the global market. From the soil to the human body, Spanish biotechnology covers the entire journey.

CONGRESS VOICE — Sergio Aguilar Roig, General Manager of Biorizon Biotech

"European agriculture will be sustainable, digital, and biotechnological, or it will not be at all."

Almería concentrates a greenhouse expanse 100 kilometers wide that produces 25% of all EU fruit and vegetable output and supports 700,000 jobs. From there, Biorizon Biotech works with microalgae-based biostimulants that improve crop productivity by 17% to 25%, without pesticides and with efficient use of water and nutrients. Their patent on the cascade hydrolysis process within a closed reactor allows for the development of custom formulations for each crop. With a small expenditure, the results for the farmer are extraordinary.

The agriculture of 2030 they describe combines these biostimulants with drones that detect pests in a single pixel, thermography to monitor drip irrigation, and robots that work the fields autonomously. The main hurdle is not technological but regulatory: registering a fungicide or a natural citric acid can take up to 10 years due to pressure from chemical lobbies. They call for a real fast track for natural bioprotectants, research grants, and mirror clauses in trade agreements to demand that imported products meet the same sanitary standards imposed on European producers.

SECTOR 13 — BIOTECNOLOGÍA Y SALUD NATURAL

Speaker: Independent Expert – Global Sales Manager at Hifas da Terra | Raquel Torres. *Block 4: Life and Consumption*

This sector was represented by Raquel Torres, an independent expert in international business as well as a Global Export Manager. Her participation is in a personal capacity, providing a strategic vision based on her current experience in developing dozens of global markets for biotechnology.

0. Reasons for selecting this sector

Health is the largest market in the world. And within it, one of the fastest-growing segments is natural, functional, and preventive health: products that do not cure diseases in the classical pharmacological sense, but rather strengthen the body, improve quality of life, and reduce the need for conventional medical intervention. It is a global market exceeding €200 billion annually and growing at double-digit rates, driven by an aging population, increased health awareness, and the search for natural and sustainable alternatives.

Spain holds a position in this sector that surprises those unfamiliar with it from the inside. The combination of exceptional biodiversity, a tradition in natural medicine, research capacity in biotechnology, and a growing ecosystem of specialized companies places the country at the frontier of innovation in natural health on both a European and global scale.

Hifas da Terra is a prime example of this position. A Galician company founded over two decades ago, it has turned medicinal mushrooms—a natural resource abundant in the northwest of the Iberian Peninsula—into high-quality biotechnological products backed by scientific evidence, with a presence in more than 30 countries and international recognition in the world's most demanding markets. This is not a sophisticated herbalist shop: it is applied science, with in-house R&D, clinical trials, and an export vocation that has led it to compete with the sector's global leaders.

This sector is included in this paper because it perfectly illustrates what Europe needs to build: high-added-value industries based on its own natural resources, backed by solid science and a real capacity for internationalization. In a world where China dominates the production of medicinal mushrooms in volume, companies like Hifas da Terra compete on quality, traceability, and scientific evidence. And they win in the markets where that matters.

1. Who We Are and What We Represent

The sector of biotechnology applied to natural health in Spain encompasses a diverse ecosystem of companies working at the intersection of science, nature, and human well-being: from laboratories specialized in medicinal plant extracts to microbiome companies, functional supplements, biotechnological cosmetics, and functional foods. This sector in Spain generates more than €3 billion annually, with a growth rate exceeding the industrial average and an increasing export capacity toward Europe, North America, and Asia.

What distinguishes the highest-value segment is the **combination of scientific rigor and natural origin**. These are not conventional pharmaceutical products, nor are they supplements without backing. They are biotechnological solutions with efficacy studies, certified quality protocols, and traceability that extends from the controlled cultivation of the mushroom to the finished product in the hands of the consumer or healthcare professional.

The Global Sales Manager at **Hifas da Terra** speaks to us about this company founded in Galicia over twenty years ago with a vision that was then pioneering: that medicinal mushrooms, used for millennia in traditional Asian medicine, could be transformed into rigorous biotechnological products with applications in modern health. Today, that vision is an exportable reality. The company cultivates its own raw materials under controlled conditions, develops its formulations with in-house R&D, works with oncologists, immunologists, and integrative physicians in various countries, and distributes its products in more than 30 markets, with a significant presence in Central Europe, North America, and the Asian market.

Its product line ranges from immune system supplements to oncology support formulations, stress management, digestive health, and cognitive performance. All of this is backed by international certifications, purity controls, and the absence of contaminants, along with a scientific communication policy that radically differentiates it from competitors who sell promises without evidence.

2. 2030 Sector Vision

By 2030, the global market for natural health and biotechnology applied to well-being will have grown to exceed **€300 billion**, with Europe standing as one of the most demanding and highest value-per-unit markets. The European consumer of 2030 will be more informed, more demanding regarding scientific evidence, and more sensitive to the traceability and sustainability of the products they consume. This represents a distinct advantage for European companies already operating under these standards.

The sector's vision for 2030 is built upon four pillars:

First: The consolidation of scientific evidence as the sector standard. Products without the backing of rigorous clinical or at least pre-clinical studies will lose market share to those that can demonstrate their efficacy. **Hifas da Terra** has spent years building this scientific foundation and will be well-positioned in this scenario.

Second: Health personalization. The combination of biotechnology, microbiome analysis, and individual health data will allow for the formulation of products tailored to the specific needs of each person by 2030. **Spain has the research capacity to lead this space.**

Third: Internationalization under European standards as a competitive advantage. Asian markets —particularly Japan, South Korea, and China— have a deep culture of using medicinal mushrooms, but they are increasingly seeking products with Western certifications and Western scientific evidence. The European "lattice" of quality and traceability is an entry passport to these markets that Asian-origin companies cannot easily replicate.

Fourth: Integration with the European healthcare system. Natural health products with solid evidence can complement conventional treatments, reduce healthcare costs, and improve the quality of life for chronic patients. Advancing this integration — within appropriate regulatory frameworks— is the great challenge and opportunity for the sector over the next five years.

3. Current Challenges and Competitiveness Levers

The first challenge is Asian competition in price and volume. China produces more than 85% of the world's medicinal mushrooms, with production costs that European companies cannot match in terms of volume. The response from **Hifas da Terra** — and the high-value segment of the sector— is to not compete on that ground: cultivating under controlled conditions in Galicia, with full traceability, no contaminants, proprietary formulations, and scientific evidence is a different model targeting a different client.

The second challenge is regulatory complexity between the food supplement and medical device categories. Natural health products operate in a regulatory gray area that varies significantly between Member States: what can be marketed as a food supplement in one country may require specific health authorization in another. This fragmentation makes internationalization more expensive and creates **legal uncertainty**.

The third challenge is R&D financing. The clinical studies necessary to demonstrate product efficacy are costly and slow, with return horizons that conventional venture capital is not always willing to fund. The sector needs public financing instruments — **Horizon Europe, CDTI, specific EIB lines**— that support this long development cycle.

The levers are equally clear:

Certified quality and traceability, which are impossible for low-cost producers to replicate. **The scientific base** accumulated through years of research and clinical collaboration. **The international commercial network** built patiently in demanding markets.

To this, we must add **Galician and Spanish biodiversity** as a differentiating natural resource: varieties of mushrooms, plants, and microorganisms that only grow under specific geographical conditions and serve as the raw material for unique products.

4. Regulatory, Customs, and Trade Framework

The sector operates within one of the most fragmented regulatory frameworks in European industry. Food supplements are governed by **Directive 2002/46/EC**, but its transposition varies enormously between Member States. Lists of permitted ingredients, dosage limits, authorized health claims, and labeling requirements differ from country to country, creating a regulatory labyrinth that particularly penalizes smaller companies.

The **Health Claims Regulation —(EC) 1924/2006—** establishes that health claims must be authorized by the **EFSA**. The problem is that the authorization process is extraordinarily slow and costly; many natural ingredients with solid scientific evidence have been unable to obtain approved claims simply because no one could fund the application process. This creates an asymmetry: conventional pharmaceutical products can communicate their benefits clearly, while natural products with similar evidence are restricted from doing so.

On the international trade front, sector exports face significant barriers in key markets:

The United States requires specific **FDA registration** for certain categories, **Japan and South Korea** have their own ingredient approval systems and **China**, despite being the world's largest market for natural health products, has entry barriers that combine regulatory requirements with a preference for national suppliers in certain categories.

Navigating this international regulatory map requires resources and expertise that SMEs in the sector do not always possess.

5. Proposals to the European Commission

Proposal 1. Truly harmonize the regulation of food supplements within the European internal market, with common positive lists of ingredients, harmonized dosage limits, and uniform labeling requirements. Current fragmentation is the greatest barrier to intra-European internationalization and creates legal uncertainty that penalizes the most innovative companies.

Proposal 2. Reform the health claims authorization process to make it more agile, proportionate, and accessible for natural ingredients with scientific evidence. The current system favors actors with the greatest resources to fund the application process and leaves out real innovations for economic, rather than scientific, reasons.

Proposal 3. Create specific funding lines in Horizon Europe for research into biotechnology applied to natural health, with special attention to clinical trials for products derived from European biodiversity. Scientific evidence is the sector's most important competitive lever; generating it requires public investment that the market alone cannot provide.

Proposal 4. Develop mutual recognition agreements with the United States, Japan, and South Korea to facilitate the access of certified European products to those markets without regulatory duplication. European quality should be a passport, not an additional obstacle.

Proposal 5. Include natural health products with clinical evidence in European preventive health and integrative medicine strategies, recognizing their potential to complement conventional treatments, reduce healthcare costs, and improve the population's quality of life. This institutional recognition would open the door to their progressive integration into European healthcare systems.

6. Final Message

European nature is an extraordinary laboratory. The biodiversity of the Iberian Northwest, the Mediterranean, and Central European forests contains solutions for human health that science has only just begun to explore. Hifas da Terra has spent more than twenty years turning that Galician biodiversity into biotechnological products that reach patients and consumers in more than 30 countries.

This model —rigorous science, natural origin, European traceability, global vocation— is exactly what Europe needs to build in more sectors and with more companies. It does not compete on price with Asia. It competes on quality, evidence, and trust. And in the markets where that matters, it wins.

For the biotechnology and natural health sector to contribute fully to the EU's strategic autonomy and the well-being of its citizens, we need harmonized regulation that eliminates internal fragmentation, financing instruments that support the long cycles of scientific research, and trade agreements that turn European quality into an advantage, not additional bureaucracy.

This sector connects with the next one —Fashion, Retail, Lifestyle, and Luxury— because health and well-being do not end with a supplement or a treatment. They are also expressed in how we dress, how we consume, and what values we project to the world. What Hifas da Terra does for the body, Desigual does for identity. Both sell something that goes beyond the product: they sell a way of understanding life.

CONGRESS VOICE — Raquel Torres, Global Sales Manager at Hifas da Terra

"European biotechnology needs fast tracks for natural ingredients and innovation hubs that connect science, business, and the healthcare system."

Hifas da Terra is number one in Europe for medicinal mushroom supplements, present in more than 25 countries with growth rates exceeding 30% since COVID-19, and 40% of its staff dedicated to R&D. Its success lies in what its Asian competitors cannot replicate: rigorous scientific evidence. They work with a spin-off from the University of Santiago, hold proprietary patents, and operate at the intersection of preventive and traditional medicine, with products like Lion's Mane, which improves the gut-brain axis and microbiota.

The central problem is unfair competition from China, which produces 85% of the world's medicinal mushrooms. Mushrooms absorb everything in their surroundings, which is why traceability is critical: knowing where the product comes from is a guarantee of real safety that Chinese supplements do not offer.

Their vision is to create a European hub for functional nutrition in Spain where universities, researchers, and companies collaborate. They call for a fast track for natural ingredients with scientific evidence, harmonization of supplement regulation within the internal market, and the recognition of integrative medicine as a lever for preventive health that reduces pressure on public healthcare systems.

SECTOR 14 — FASHION, RETAIL, LIFESTYLE, AND LUXURY

Speaker: Independent Expert – former Sales Manager Florida & Miami at Desigual
| Raquel Torres. *Block 4: Life and Consumption*

This sector was represented by Raquel Torres, an independent expert in international business as well as a Global Export Manager. Her participation is in a personal capacity, providing a strategic vision based on more than two decades of experience in developing global markets for retail, circular fashion, and luxury.

0. Reasons for selecting this sector

Spanish fashion needs no introduction. Zara, Mango, Camper, Loewe, Balenciaga, Desigual: brands that have redefined what it means to dress in the 21st century and are present today on the streets of New York, Tokyo, Dubai, and São Paulo. Spain is the world's fifth-largest fashion exporter and the second-largest in Europe, with an industry that generates over €30 billion in annual revenue and directly employs more than 200,000 people.

However, this sector is not included in this paper solely for its figures. It is included because fashion is one of the most powerful vectors for projecting European identity to the world. When someone in Miami or Singapore buys a Desigual garment, they aren't just buying fabric: they are buying an aesthetic, a set of values, and a way of understanding creativity and diversity that are profoundly European. This has enormous economic value, but also a strategic value that purely industrial analyses often fail to capture.

The timing for its inclusion is now because the sector is at a turning point. European sustainability regulation —with the Ecodesign Regulation, the Sustainable Textile Strategy, and Digital Product Passport requirements— will radically transform the rules of the game over the next five years. European companies that have spent years working with real sustainability criteria will have an advantage. Those that haven't will face a costly and urgent transition. And competitors from outside Europe entering the market without meeting these standards will generate pressure that the Commission must address with concrete instruments.

Desigual represents in this paper an example of a European brand with a global presence, a vocation for positive impact, and the perspective of one selling in one of the most competitive markets in the world: the U.S. market, viewed from one of its

Sales Managers in Florida and Miami—gateways to Latin America and the high-purchasing-power global consumer.

1. Who We Are and What We Represent

The fashion, retail, and lifestyle sector in Spain encompasses an ecosystem ranging from mass distribution—with Inditex as an unbeatable global benchmark—to medium-sized brands with their own identity, independent designers, footwear and accessory manufacturers, and the accessible luxury industry that occupies the space between fast fashion and pure luxury. It is an extraordinarily diverse sector in terms of size, positioning, and business model, yet it shares a common denominator: the ability to create products with a strong charge of identity, design, and values that differentiate them from faceless mass production.

Spain exports fashion to more than 180 countries. Spanish footwear—especially from Alicante and the Balearic Islands—is a world leader in quality and design. The technical textile sector complements conventional fashion with applications in sports, tourism, and architecture. And brands like Desigual have built a global presence from Barcelona that competes with the industry giants in the most demanding markets.

Desigual was founded in Barcelona in 1984 and has become one of the most internationally recognized Spanish brands, present in more than 100 countries with a powerful, colorful visual identity deeply committed to diversity and positivity. It is not a luxury brand in the traditional sense: it is a lifestyle brand that has found its niche among consumers who want to stand out, who value creativity over logos, and who seek fashion with character without paying haute couture prices.

Its presence in Florida and Miami is no coincidence. Miami is the connection node between Europe, North America, and Latin America for the premium fashion and lifestyle consumer. It is the market where one tests whether a European brand has the consistency and appeal to compete in the most diverse and demanding environment in the world. Raquel Torres, from that position, has a unique perspective on what the global market demands from European fashion and on the frictions that companies in the sector encounter in their internationalization.

2. 2030 Sector Vision

By 2030, the fashion sector will have completed the most profound transformation in its history since the Industrial Revolution. The **fast fashion model**—mass production, short cycles, low prices, rapid disposal—will be under increasing regulatory and social

pressure that will make it unsustainable in its current form. The winning brands will be those that have built value propositions based on **durability, identity, traceability, and verifiable sustainability**.

The sector's vision for 2030 is articulated through four key transformations:

First: Circularity as the standard. Designing for durability, implementing garment collection and reuse systems, using certified recycled materials, and achieving a true circular economy that reduces the sector's environmental impact without sacrificing creativity or affordability.

Second: Digitalization of the shopping experience and the value chain. This includes the **Digital Product Passport** providing full information on origin, materials, and environmental footprint; AI-driven personalization; seamless integration between physical and digital channels; and efficient reverse logistics to make circularity viable at scale.

Third: Repositioning European fashion in the global market as a benchmark for quality, sustainability, and creativity. The "Brand Europe" in fashion carries enormous weight in global premium markets. Building this collective positioning —without homogenizing the individual identities of each brand— is a strategic opportunity that the EU has yet to fully exploit.

Fourth: Integrating consumer values into the brand proposition. The consumer of 2030 —especially the youth— does not just buy a product: they buy a stance on the world. Brands with a clear identity of values, consistent with their actual practices, will have the advantage. Desigual, with its explicit commitment to diversity and positivity, has spent years building exactly that.

3. Current Challenges and Competitiveness Levers

The first challenge is competition from ultra-fast fashion platforms of Asian origin —such as Shein and Temu— which operate with business models based on unmatched prices, collection cycles measured in days, and a social media engagement capacity that defies conventional marketing rules. These platforms enter the European market without meeting the same sustainability, labeling, and labor standards required of European manufacturers. This asymmetry is not competition: it is **regulatory dumping**.

The second challenge is managing the transition toward sustainability with viable business models. Producing more sustainably costs more. Communicating this credibly requires investment in traceability and certification. And convincing the

consumer that it is worth paying more for it is a market education exercise that no company can undertake alone. It requires a regulatory framework that levels the playing field.

The third challenge is internationalization in markets with complex non-tariff barriers. The U.S. market, where Raquel Torres operates, has specific requirements for labeling, composition, and certification that differ from European ones. Japanese, Gulf, and emerging markets have their own particularities. Navigating this complexity requires resources and expertise that medium-sized brands do not always have available.

The competitive levers are equally clear:

Design and brand identity, which are impossible to copy at low cost.

Traceability and certified sustainability as a differentiator in premium markets.

The international commercial network built through years of direct presence in the most relevant markets.

To this, we add **Spanish creativity as a renewable resource**: Barcelona, Madrid, and Valencia generate world-class design talent that continuously fuels innovation in the sector.

4. Regulatory, Customs, and Trade Framework

The EU Strategy for Sustainable Textiles and the Ecodesign for Sustainable Products Regulation (ESPR) are set to transform the sector in the coming years. The Digital Product Passport —which will require detailed information on composition, origin, care instructions, and repair and recycling options— is a sound measure that European brands committed to transparency are already preparing for. For competitors who reject this transparency, it will serve as a real barrier to entry.

The central problem is the asymmetry in enforcement. While European brands invest in compliance, large online retailers of Asian origin operate in regulatory gray areas that allow them to evade many of these obligations. The Commission must close these gaps urgently: the Digital Markets Act and the Platform Responsibility Directive are steps in the right direction, but their implementation needs to be accelerated.

On the international trade front, EU agreements with key markets for premium fashion —such as the United States, Japan, and the Emirates— must include specific clauses for the recognition of European sustainability certifications and customs facilitation for high-value fashion products. Tariffs on textiles and footwear in many

destination markets remain high and asymmetrical compared to those Europe applies to equivalent imports.

5. Proposals to the European Commission

Proposal 1. Urgently and without exception, apply the requirements of the Ecodesign Regulation and the Digital Product Passport to all sellers operating in the European market, regardless of their origin. Sustainability cannot be a requirement solely for European companies while Asian competitors operate without it in the same market.

Proposal 2. Develop a European sustainable fashion seal with international recognition to serve as a competitive differentiator in global markets. A European certification recognized in the United States, Japan, and Gulf markets would turn European standards into a commercial advantage rather than just a compliance cost.

Proposal 3. Include textile sustainability and minimum labor condition clauses in all EU trade agreements, backed by real verification mechanisms. Agreements that do not include these clauses generate unfair competition for the European industry that already meets these standards.

Proposal 4. Facilitate the internationalization of medium-sized European fashion brands with specific support instruments: export guarantees, assistance with certification for third markets, programs for presence at international trade fairs, and support for the digitalization of international sales channels.

Proposal 5. Close the regulatory gaps that allow non-EU e-commerce platforms to operate in the European market without meeting the same obligations as European companies regarding labeling, sustainability, product safety, and taxation. Leveling the playing field in the digital market is an urgent priority.

6. Final Message

European fashion is not a sector in decline. It is a sector in transformation toward a more sustainable, more creative model, committed to the values Europe wants to project to the world. The brands leading this transformation —such as Desigual from Barcelona or Miami— will demonstrate that creativity, sustainability, and profitability are not incompatible: they are exactly the same thing when done well.

Spain has the talent, the brands, and the tradition to lead this European agenda. What it needs is a level playing field where the standards required of European producers are also required of those who wish to access the European market.

For the fashion, retail, and lifestyle sector to contribute fully to Europe's international projection and industrial autonomy, we need regulation that levels the playing field, trade agreements that recognize the value of certified sustainability, and the institutional support for European brands to compete in global markets with all the necessary tools.

This sector connects with the next and final one —Media and Economic Narrative— because fashion does not exist without narrative. A brand is, in its essence, a story told consistently over time. And the ability to tell the story of Spain and Europe effectively to the world —its industry, innovation, sustainability, and values— is exactly what the last sector of this paper aims to defend.

CONGRESS VOICE — Raquel Torres, former Sales Manager Florida & Miami at Desigual

"Europe must regain textile industrial sovereignty and lead circular fashion."

Desigual was born in Barcelona in 1984 and is now present in more than 100 countries with a powerful visual identity and an explicit commitment to diversity and positivity. Raquel Torres represented the brand from Miami, which is no casual choice: Miami is the hub where it is tested whether a European brand has the consistency and appeal to compete in the most diverse and demanding environment in the world—the gateway to Latin America and the high-purchasing-power global consumer.

Her message is clear: Spain wants to promote a European Circular Fashion Hub, betting on textile waste, sustainable materials, ecodesign, and omnichannel strategies. The competitive lever is not price but creativity, traceability, and brand values. The consumer of 2030 does not just buy a product: they buy a stance on the world.

The urgent problem is platforms like Shein or Temu, which operate in the European market without meeting the same sustainability, labeling, and labor standards required of European manufacturers. This is not competition: it is regulatory dumping. The Commission must apply the Ecodesign Regulation and the Digital Product Passport without exception to all sellers operating in the European market, regardless of their origin. Sustainability cannot be a requirement only for European companies.

BLOCK 5: COMMUNICATION AND SMART MANUFACTURING

SECTOR 15 — MEDIA AND ECONOMIC NARRATIVE

Speaker Company: TuComex presents the Spanish smart manufacturing ecosystem. *Block 5: Communication and Smart Manufacturing*

Cristina Peña shares her experience in climate control companies and construction machinery, and how **TuComex** has provided commercial support to Spanish manufacturers such as **Iberstraws**, European leaders in the manufacture of paper straws.

0. Reasons for selecting this sector

This sector closes the paper because it is what gives meaning to all the others. Having the best water technology is useless if no one knows about it. Building the most advanced frigates in Europe is futile if the continent's strategic narrative does not include them. Exporting ceramics, medicinal mushrooms, or sustainable fashion serves little purpose if Europe does not know how to tell the world what it is worth.

Economic narrative is power. Countries that know how to tell their industrial and technological story with clarity, pride, and evidence attract investment, build trust, influence the rules of the game, and occupy a space in the minds of global decision-makers that silent countries never reach. The United States has been the absolute master of this narrative for decades. China has learned the lesson and executes it with a consistency and scale that Europe has yet to match.

Spain has a narrative problem that is not a problem of content, but of packaging and amplification. The fifteen sectors presented in this paper are proof that Spanish industry and technology have much to tell. The problem is that it is not always told well, it is not always told in the right forums, and it is not always told with the coherence and coordination necessary for the message to reach its destination.

Iberstraws represents in this paper something broader than a single company: it represents the smart manufacturing ecosystem, and TuComex provides that economic narrative, supported by media and specialized platforms that connect Spanish industrial reality with markets, investors, regulators, and public opinion. Communication is the voice that amplifies the other fourteen voices of this paper.

1. Who We Are and What We Represent

The economic media and industrial narrative sector in Spain encompasses a diverse ecosystem: specialized economic and business media, corporate communication agencies, B2B content platforms, sector-specific events and congresses, economic think tanks, and the growing space of specialized digital communication. It is a sector that in itself moves billions of euros, but its strategic value is far greater than its direct economic weight: it is the sector that builds the reputation of all the others.

Smart manufacturing —intelligent production— is the industrial context in which this sector operates with the greatest relevance. The digitalization of the Spanish manufacturing industry, with its combination of robotics, automation, Industrial IoT, AI applied to production, and digital twins, is an extraordinary story of transformation that rarely leaves specialized circles. Companies digitalizing their factories in Galicia, the Basque Country, Catalonia, or Valencia are doing something that deserves to be told on a European and global scale.

Iberstraws represents the fabric of innovative industrial companies that have transformed traditional sectors through technology and sustainability, and whose story perfectly illustrates what Spanish industry can achieve when combining ingenuity, investment, and an export vocation.

TuComex is a consulting firm that helps companies open new markets by developing assertive communication based on economic intelligence; that is, it helps organizations build their strategic narrative and position themselves in the spaces where the decisions that matter are made and in front of the key individuals.

2. 2030 Sector Vision

By 2030, economic narrative will have acquired an explicit strategic dimension in European industrial and trade policy. The **war of narratives** —who tells the story of global trade, technology, and industrial values— will be just as important as the war over tariffs or technical standards. Europe needs to be in that field with the same determination it shows in others.

The sector's vision for 2030 is built upon three pillars:

First: The professionalization of European economic communication. This means specialized media with the resources, independence, and international reach to build a narrative about European industry and technology comparable in quality and distribution to that of major Anglo-Saxon outlets. *The Economist*, *Financial Times*, and

Bloomberg largely define how the world perceives the European economy. **Europe needs its own voices with that level of reach.**

Second: The integration of narrative into industrial policy. Every European investment program, trade agreement, and major regulation must be accompanied by a communication strategy that explains its value to companies, citizens, and international partners. The gap between what Europe does and what Europe communicates it does is one of the continent's greatest wastes of institutional capital.

Third: Positioning Spain as a benchmark for European smart manufacturing. Spanish smart factories, digitalized industrial clusters, and companies that have transformed traditional sectors with advanced technology are stories that deserve to be told in Brussels, Berlin, Washington, and Tokyo. **This congress is exactly the kind of initiative that builds this positioning.**

3. Current Challenges and Competitiveness Levers

The first challenge is the fragmentation of the European economic media ecosystem. Unlike the Anglo-Saxon space, where a few reference outlets concentrate the attention of global decision-makers, the European ecosystem is fragmented by languages, national markets, and business models that are not always sustainable. This fragmentation dilutes impact and makes it harder to build a coherent European narrative with global reach.

The second challenge is economic misinformation and competition from low-quality content. In an environment of information overabundance, rigorous, well-documented content with a strategic perspective competes in the same algorithms as "noise." Building loyal, high-quality audiences —the decision-makers who truly matter— requires sustained investment in **credibility** that conventional advertising business models cannot always support.

The third challenge is the speed of technological change applied to media. Artificial intelligence is transforming the production of economic content with a speed that forces a rethink of the value-added models of specialized media. Newsrooms that do not clearly define what they provide that AI cannot replicate will find themselves in a very difficult position before 2030.

The levers are equally clear:

Accumulated credibility as a primary asset —impossible to automate or replicate quickly.

Deep sector specialization that generates reference content for specific professional communities.

The ability to connect companies, institutions, and markets within the same conversation space.

Events like the **TuComex Congress** are precisely that: platforms where the economic narrative is built in real-time, with the key protagonists present.

4. Regulatory, Customs, and Trade Framework

The media and communication sector operates within a European regulatory framework that is evolving rapidly, with direct implications for economic narrative. The European Media Freedom Act establishes guarantees for pluralism and editorial independence, which are a necessary foundation for a high-quality European economic narrative. Without independent media, there is no credible narrative.

The Digital Services Act (DSA) and the Digital Markets Act (DMA) are reshaping the rules for the distribution of economic content on digital platforms. The visibility of specialized European media within major distribution algorithms —such as Google, Meta, and LinkedIn— currently depends on rules that favor high-volume, high-engagement content over content with greater rigor and informative value. Correcting this algorithmic asymmetry is a matter of public policy, not just business.

On the commercial front, the sector identifies a clear opportunity in European communication and international image programs. The EU invests significant resources in institutional communication, but it could multiply its impact by collaborating more closely with the specialized private media and communication ecosystem, which possesses audiences, credibility, and distribution capacities that direct institutional communications cannot match.

5. Proposals to the European Commission

Proposal 1. Develop a European industrial and technological narrative program to support the international production and distribution of content regarding European industry, innovation, and technology. This would be the communicative equivalent of the Erasmus program: an investment in how Europe tells its story to the world, involving media, companies, and institutions from all member states.

Proposal 2. Integrate explicit communication strategies into all major European investment and industrial policy programs. Horizon Europe, the Green Deal Industrial Plan, the European Chips Act: each of these programs generates extraordinary stories of innovation and impact that remain invisible due to the lack of a commensurate communication strategy. Changing this is not a luxury: it is a condition for political effectiveness.

Proposal 3. Support the development of European economic media with international reach through financing instruments that do not compromise editorial independence. The model of European news agencies and certain reference outlets proves it is possible to combine public support with real independence. Europe needs its own voices in the spaces where global economic opinion is shaped.

Proposal 4. Work with major digital platforms to develop algorithmic visibility criteria that do not penalize rigorous, specialized content in favor of high-volume, low-information-value content. Information quality is a public good that engagement-maximizing algorithms systematically undervalue.

Proposal 5. Recognize and support congresses, forums, and private economic diplomacy events—such as the TuComex Congress— as foreign and trade policy instruments that complement institutional channels. These are spaces where the narrative is built by the actual protagonists, where proposals reach those who can implement them, and where the voice of business connects directly with policy. Their strategic value far exceeds their cost.

6. Final Message

This paper ends where it began: in the conviction that Spain has much to say in the conversation about Europe's industrial and trade future, and that this voice is worth more when it is organized, reasoned, and amplified in the right forums.

The fifteen sectors presented in this congress are fifteen stories of innovation, resilience, and international projection that deserve to be known in Brussels, Berlin, Washington, and in the markets where the future of global trade is decided. Telling them well is not vanity: it is strategy.

For Europe to be the global actor it aspires to be, it needs not only to manufacture better, innovate more, and trade more intelligently. It also needs to tell the story of what it does better, with the clarity, pride, and coherence that its achievements deserve. Spain is ready to lead that narrative. This congress is proof that it has already begun.

CONGRESS VOICE — TuComex and Iberstraws

"Spain can lead the new sustainable European industry with its smart manufacturing."

Economic narrative is power, and Spain's problem is not one of content, but of amplification and coordination. The challenge is to tell the story well, in the right forums, and with the necessary coherence so that the message reaches its destination. This Congress is exactly that: projection in Brussels. Giving it space within the European Commission means showcasing real Spanish industry.

Iberstraws embodies a Spanish company that manufactures 100% sustainable paper straws on an industrial scale, replacing plastics with biodegradable alternatives with an export-oriented vision. It is proof that Spain can produce, innovate, and scale in sectors that are a priority for Europe's green transition, thanks to its solid production capacity, sustainable materials, proprietary technology, and smart manufacturing with a direct impact on daily life.

5. The European Commission's Trade Champions

THE EXPORTER'S VOICE

Cristina Peña Andrés, appointed European Commission Trade Champion in 2025

Cristina Peña has been recognized by the European Commission as one of the individuals who best represent, promote, and communicate the value of EU international trade.

TuComex works at the intersection of Spanish business and international markets with a specific mission: to bridge the gap between the opportunities that exist in the world and the actual capacity of companies —especially SMEs— to seize them.

This work led to **Cristina Peña Andrés** being named an **EU Trade Champion** by the European Commission: a signal that her independent voice and her way of understanding internationalization —accessible, practical, and oriented toward real business— adds significant value to the design of European trade policy.

Being a **Trade Champion** is an institutional appointment that distinguishes professionals capable of bringing European trade policy closer to companies, associations, and citizens, acting as a **bridge between Brussels and the business fabric**. In practice, it involves participating in structured dialogues, disseminating trade agreements, supporting companies in their internationalization, and ensuring that the voice of the Spanish business sector is present on the European agenda. As a result of this role, it has been possible to organize this Congress with the direct participation of the European Commission.

The Exporter's Challenges That No One Solves Alone

Throughout the preparation of this paper, the fifteen sectors have identified **five transversal frictions** that affect them all, regardless of their specific activity:

Geopolitical uncertainty tops the list. Spanish exporting companies operate in an environment of growing trade tensions without the intelligence and anticipation tools that their competitors in the United States, China, or South Korea possess. They need Europe to provide that strategic advantage.

Regulatory complexity is the second friction. The accumulation of European regulations —CSRD, CBAM, technical standards, traceability requirements— creates

a burden that large companies struggle to absorb and that can be directly discouraging for SMEs. The request is not for *less* regulation, but for **better-designed regulation**, with realistic deadlines and coherence between Directorates-General.

The lack of accessible market intelligence is the third. Large corporations have geopolitical analysis departments and contact networks in every relevant market. An industrial SME from Vigo, Albacete, or Castellón has none of that. And yet, it is these SMEs that form the densest and most resilient exporting fabric in Spain.

The gap between the language of Brussels and that of real business is the fourth. European trade agreements are written for specialized lawyers, not for the export director of a hundred-person company. This distance is not just a communication problem: it is an **utilization problem**. Many agreements are underused because companies do not know how to take advantage of them.

The fifth is the need for more active and coordinated economic diplomacy. When a Spanish company competes in a tender in Saudi Arabia or Vietnam, it needs to feel it has the **weight of Europe** behind it, not just its passport.

The Exporter's Requests to the European Commission

Today's exporter needs:

Early and structured listening to industrial sectors before closing trade agreements. This must not be a last-minute formal consultation, but a continuous process that incorporates the perspective of those who will live with the consequences of what is negotiated.

Investment in education and guidance on how to leverage existing agreements. The EU has agreements with more than 70 countries, many of which are underutilized due to a lack of knowledge. A technical assistance program for exporting SMEs would generate immediate economic returns.

Real regulatory simplification and reduction of administrative burdens, with proportionality criteria that protect SMEs from the regulatory weight designed for large corporations.

A European support program for high-value-added internationalization — technology, advanced services, Industry 4.0— including export guarantees, financing in emerging markets, and support for international certification.

Explicit recognition of Spanish leadership in the strategic sectors presented in this paper. Spain is not merely a recipient of European funds: it provides unique

capabilities in water, energy, defense, logistics, and biotechnology that strengthen the resilience of the entire EU.

Internationalization is not just another chapter of the Spanish economy: it is the condition for our fifteen strategic engines to become real levers for European autonomy, resilience, and influence. A Spain that exports knowledge, technology, and industry does not only generate its own wealth: **it builds the Europe we need.**

6. Discussion Forum for the 15 Sectors

This paper concludes with **five principles** that, if incorporated into the design of European trade and industrial policy, will make everything else easier.

Accelerate and modernize trade agreements with strategic diversification criteria. The EU needs more market access, less dependence on single suppliers, and more capacity to choose with whom and under what conditions it trades. Agreements with **Mercosur, Mexico, India, the Gulf countries, and the Indo-Pacific** are not just economic opportunities: they are foreign policy instruments that strengthen Europe's position in a world reorganizing into blocs.

Strengthen Open Strategic Autonomy, especially in the critical sectors identified in this paper: water, energy, mobility, defense, health, and digital technologies. Strategic autonomy does not mean autarky: it means having the capacity to choose, to diversify, and to not depend on external decisions for essential supplies. Spain contributes to this autonomy with real capabilities across all these sectors.

Simplify regulation and improve coordination among the Commission's Directorates-General. Trade policy cannot move in one direction while industrial policy moves in another and environmental policy in a third. Coherence between DG Trade, DG Grow, DG Energy, and DG Environment is not a bureaucratic detail: it is a condition for effectiveness. Companies cannot manage contradictory signals simultaneously.

Boost coordinated European economic diplomacy, with a greater presence in emerging markets, more operational support for companies, and increased investment in shared economic intelligence. The competition for the markets of the Global South—Africa, Latin America, Southeast Asia—is happening now. Europe cannot arrive late due to a lack of presence or coordination.

Recognize and enhance Spain's role as an industrial, technological, and logistical hub of the European Union. Not for reasons of national pride, but for reasons of collective efficiency: Spain provides capabilities that the EU as a whole needs, and explicitly recognizing them in European industrial and trade policy is a smart decision, not a favor.

7. Final Messages for the European Commission

The working session with the 15 strategic sectors of the Spanish economy generated a solid consensus around six key priorities that Spanish companies consider essential to strengthening European competitiveness, accelerating innovation, and consolidating the EU's strategic autonomy.

1. Technical Harmonization: Overcoming the "Terrible Ten" Companies demand real harmonization of technical standards within the EU. The coexistence of multiple national interpretations and requirements —the so-called "**Terrible Ten**"— creates internal technical barriers that contradict the spirit of the Single Market. Differing certifications by country delay the entry of innovative products, while duplicated approvals increase the cost of operating across different Member States.

"A Single Market without internal friction strengthens European competitiveness against third countries"

2. Customs Uniformity and Fast Tracks for Innovation There is a call for a uniform interpretation of the Union Customs Code, especially regarding innovative products and emerging technologies. Companies propose **customs fast tracks** for strategic projects that generate economic growth. Differing customs classifications by country and clearance times incompatible with sensitive products are frictions the Single Market cannot afford.

"Innovation needs agile and homogeneous procedures to compete globally."

3. Knowledge Sovereignty: A European Industrial and Technology Hub Companies propose the creation of a **European Industrial and Technological Knowledge Hub**, based on alliances between businesses, universities, R&D centers, clusters, and associations. Its objectives are to protect European talent and intellectual property, accelerate technology transfer, and facilitate internationalization through European one-stop shops.

"Europe must retain and scale its own strategic knowledge"

4. Fair Trade: Requiring Third Countries to Comply with Our Standards Businesses call for reinforced reciprocity: if a country wishes to access the European market, it must comply with European standards in sustainability, traceability, safety, and quality. Unfair competition resulting from laxer environmental and labor standards outside the EU is not free trade: it is an **asymmetry** that erodes European industry from within.

"The EU must protect its market and ensure a level playing field"

5. Boosting Innovation through Supervised Temporary Authorizations

Companies propose a system of **temporary authorizations** for emerging technologies, with reinforced supervision, allowing them to be tested in the European market before final approval. Europe cannot afford to let its innovations mature outside its borders due to a lack of agile testing frameworks.

“Europe must accelerate innovation without compromising safety”

6. Business Dialogue in Trade Agreements Companies request a structured dialogue to ensure that trade agreements translate into real and visible benefits for the business fabric. This includes support for internationalization in third countries, clear information on sectoral opportunities, and impact monitoring by sector.

“Trade agreements must become tangible tools for exporting more and better”.

6 PRIORITIES OF SPANISH COMPANIES FOR EUROPEAN COMPETITIVENESS

TU COMEX 2026 CONGRESS - BRUSSELS

1



• Technical Harmonization.

Overcoming the "Terrible Ten" barriers to advance toward a truly unified single market within the European Union.

2

• Customs Uniformity.

Achieving a common interpretation of the UCC across all member states and establishing fast-track procedures that drive innovation.



3



• Knowledge Sovereignty.

European Hub of Industrial and Technological Knowledge, which protects talent and intellectual property and accelerates technology transfer.

4

• Fair Trade

Requiring third countries to comply with EU standards in order to guarantee fair competition.



5



• Temporary Authorizations.

Facilitate processes that enable faster innovation while maintaining adequate oversight.

6

• Dialogue in Trade Agreements

Ensure the effective implementation of the agreements and strengthen export support.



8. Closing and Conclusion

This paper was born from a simple conviction: that **the voice of Spanish industry and technology has something vital to contribute** to the conversation regarding Europe's commercial and industrial future, and that this voice carries more weight when it is organized, reasoned, and presented in the right forum.

The fifteen sectors represented in this congress are fifteen demonstrations that Spain possesses real capabilities, innovative companies, and an industrial and technological fabric that can contribute decisively to the Union's major objectives: **strategic autonomy, the green transition, digital leadership, resilience in the face of crises, and global projection.**

European trade policy will be stronger, more legitimate, and more effective if it integrates the vision of those on the ground: the companies that innovate every day, that export using their own resources, that create employment in real territories, and that represent Europe in the world's most competitive markets. These companies are not asking for protection. They are asking for a fair framework, appropriate instruments, and the recognition that what they do matters.

Spain is ready to lead. Europe needs it to do so.





6TH INTERNATIONAL CONGRESS OF TUCOMEX - BRUSSELS

This paper presents the shared vision of fifteen strategic Spanish sectors, presented at the 6th TuComex International Congress – Brussels 2026, with the participation of the European Commission's DG Trade. Driven by TuComex and led by Cristina Peña Andrés, EU Trade Champion, this document synthesizes proposals to strengthen Europe's industrial, technological, and commercial autonomy. This work continues through the TuComex Strategic Leadership Council (TSLC) and the 7th TuComex Congress – Brussels 2027, consolidating an informed, constructive and aligned Spanish business voice with the priorities of the European Union.



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