



Delhi Policy Group

Advancing India's Rise as a Leading Power



POLICY BRIEF

Developments in the Indian Military - 2025

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ABOUT US

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DGMO Lieutenant General Rajiv Ghai, Air Marshal AK Bharti, DGAO, IAF, Vice Admiral AN Pramod and Major General S.S. Sharda briefing the media on Operation Sindoor at National Media Centre, in New Delhi on May 11, 2025. Source: [PIB](#)
Indian Navy commissioned three frontline naval combatants - INS Surat, INS Nilgiri and INS Vaghsheer- at the Naval Dockyard in Mumbai on January 15, 2025. Source: [PIB](#)

The Indian Air Force decommissioned its MiG-21 fighter jets on September 26, 2025, at Chandigarh Air Force Station after 62 years of service. Source: [X/@SpokespersonMoD](#)

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Global Overview

The year 2025 witnessed significant military developments across the world, characterised by intensifying great power competition and high-end war in Europe and the Middle East, along with several other conflicts from Asia to Africa and South America.

The military scenario was dominated by technological advancements, the diffusion of autonomous and AI-enabled systems, evolving global alliances, accelerating force reform and modernisation across nations, and shifting defence strategies.

Beyond headline wars and galloping technology, many nations in Africa and Asia, including Afghanistan, Democratic Republic of the Congo, Cambodia and Sudan, remain in protracted conflict and severe insecurity, with humanitarian operations having to adapt to increasingly complex armed group environments.

This overview outlines key trends and notable events that shaped the military landscape during the past year.

Technological Advancements

- *Artificial Intelligence (AI) and Autonomous Systems:* Defence forces accelerated the integration of AI into their operations, deploying autonomous drones, robotic vehicles, and real-time decision-support systems. Counter-drone systems gained traction. AI-driven intelligence, surveillance, and reconnaissance (ISR) capabilities enabled faster and more accurate threat assessments. AI has transitioned from a support tool to an active participant in the OODA loop.
- *Hypersonic Weapons:* While Russia, China, and the United States have deployed operational hypersonic missiles capable of exceeding Mach 5, several other nations have advanced to near-operational or initial deployment stages. These weapons challenged existing missile defence systems and prompted renewed investment in counter-hypersonic technologies.

- *Cyber Warfare*: Cyber operations became central to military strategy, with nations investing heavily in offensive and defensive cyber capabilities. Critical infrastructure protection and information warfare emerged as top priorities.
- *Quantum Technology*: Progress in quantum computing and quantum communication promised to revolutionise secure communications and codebreaking, with military research and collaboration intensifying in this area.
- *Predictive analytics*: AI models like those in the US Navy's Project Overmatch now analyse vast amounts of sensor data to predict enemy movements and optimise fleet positioning before a shot is even fired.

Global Hotspots

- *South Asia*: India fought a 3-day conventional conflict with Pakistan, launching Operation Sindoar in response to a barbaric attack by Pakistani terrorists in Pahalgam, Jammu and Kashmir. The security environment in Bangladesh deteriorated severely, raising concerns along India's eastern borders. Chinese infrastructure development in the Tibetan plateau continued unabated.
- *Indo-Pacific*: The region remained a strategic hotspot, with increased naval deployments and military infrastructure development. Tensions between India and Pakistan on one end, and between China and Japan on the other, were symptomatic of underlying instability. Tensions rose in the South China Sea and the Western Pacific, with competing territorial claims and military build-ups.
- *Europe*: The conflict in Ukraine influenced European defence policies, with increased investment in missile defence, cyber resilience, and rapid reaction forces. There was a distinct shift towards greater defence spending by European nations, catalysed by US policies towards NATO and Europe. The Russia-Ukraine war continued with grinding offences, large-scale drone and missile exchanges, and growing moves towards a negotiated settlement.
- *Middle East*: Whilst a shaky ceasefire was achieved between Israel and other warring parties in the region, ongoing instability prompted modernisation of air defence and drone warfare capabilities, with regional powers investing in indigenous arms production, and striking new alliances such as between Saudi Arabia and Pakistan. Iran's power distinctly waned, as did that of its proxies.

However, the Red Sea and regional maritime security remain stressed by missile and drone threats to shipping, particularly linked to Yemen-based Houthis.

Evolving Defence Doctrines and Alliances

- Countries prioritised the modernisation of their armed forces, focusing on digitalisation, network-centric warfare, and joint-force integration to enhance operational effectiveness.
- Armed forces are moving towards robotic and algorithmic warfare, integrating unmanned platforms and decision-support tools into routine operations.
- Nuclear force modernisation and debates about deterrent stability continue as a parallel strategic trend.
- Traditional alliances such as NATO continued to evolve, with member nations increasing defence spending and joint exercises. New regional partnerships emerged in the Indo-Pacific and Middle East, driven by shared security concerns.

Defence Industry and Procurement

- Defence budgets increased globally, with a focus on procuring advanced platforms such as stealth aircraft, next-generation tanks, and multi-domain command systems. Emphasis was placed on indigenisation and reducing reliance on foreign suppliers, particularly in Asia and the Middle East.
- For India, the Defence Acquisition Programme prioritised Make-in-India initiatives, with record investments in domestic manufacturing, joint ventures with international firms, and the development of next-generation military technologies.
- Europe's defence industry is also undergoing a major transformation driven by the Ukraine war and the dilution of the transatlantic alliance. There have been significant spending increases and efforts to streamline rules to enable faster, collaborative, European-focused defence investments.

Military developments in 2025 reflected a world in transition, with technological innovation, evolving alliances, and regional tensions shaping defence strategies.

We now turn to the key developments in the Indian military in 2025.

India-Pakistan Border

Operation Sindoor

On April 22, a heinous terrorist attack on civilian tourists in Pahalgam, Jammu and Kashmir, claimed the lives of 26 civilians. Responsibility for the attack was claimed by The Resistance Front (TRF), a group affiliated with Lashkar-e-Taiba.

In response, India launched “Operation Sindoor” on the night of May 6-7, striking terrorist infrastructure within Pakistan and Pakistan-occupied Jammu and Kashmir. The most significant of these strikes were at the headquarters of Lashkar-e-Taiba (LeT) at Muridke and of Jaish-e-Mohammed (JeM) at Bhawalpur.

Pakistani Prime Minister Shehbaz Sharif declared the Indian action an act of war and claimed that Pakistan had shot down several Indian warplanes.¹ On the next two nights, Pakistan attempted to engage several military targets in Northern and Western India using drones and missiles. Heavy shelling commenced at the Line of Control, with Pakistani firing killing several civilians in the border town of Poonch.²

The situation escalated dramatically on the night of 9-10 May, with Pakistan firing several high-speed missiles at bases in Punjab. One Fatah-II ballistic missile, with a range of 400 km, was shot down near Sirsa.³ The Indian Air Force, in a devastating attack, struck Pakistan's airbases, command centres, military infrastructure, and air defence systems. The first wave of strikes hit Nur Khan, Rafiqui, Rahim Yar Khan, and Sukkur. This was followed by strikes at Sarghoda, Bholari, and Jacobabad airbases. India also struck command and control targets at Murid and radar sites at Chunian, Arifwala, and Pasrur.⁴

¹ Al Jazeera. “‘Act of War’: Pakistan Pledges Retaliation to Indian Deadly Attacks.” <https://www.aljazeera.com/news/2025/5/7/pakistan-decries-act-of-war-vows-retaliation-as-india-launches-strikes>.

² Desk, India Today News. “Targets, Scale, Motive of Pak’s Drone Attack: What India Said.” India Today, May 9, 2025. <https://www.indiatoday.in/india/story/pakistan-drone-strikes-india-briefs-may-8-attack-operation-sindoor-2722398-2025-05-09>.

³ News18. “Pakistani Fatah-II Missile Aimed At Delhi Intercepted In Sirsa: Indian Govt Sources.” <https://www.news18.com/india/india-cities-high-alert-pakistan-operation-bunyan-ul-marsoos-fateh-2-missile-intercepted-sirsa-operation-sindoor-latest-news-ws-l-9330892.html>.

⁴ “IAF Severely Damaged 11 Pak Airbases in May 8-10 Military Strikes – Nur Khan, Sargodha, Skardu among Key Targets - The Economic Times.”

<https://economictimes.indiatimes.com/news/defence/india-pakistan-ceasefire-iaf-strikes-11-pakistani-airbases-inflicts-severe-damage-targets-include-nur-khan-sargodha-and-skardu/articleshow/121060642.cms?from=mdr>.

The extensive damage caused to the 11 Pakistani airbases led to Rawalpindi requesting a ceasefire during a call between the two Director Generals of Military Operations (DGsMO) on May 10. India accepted the Pakistani request.

The 88-hour conflict threw up several essential lessons on escalation management and control, jointness in planning and execution, the decisive impact of long-range vectors, employment of airpower, drone warfare, and narrative management. These are being closely studied by the Indian military.

The Indian political and military leadership has repeatedly asserted that Operation Sindoor has only been paused, not terminated. India has made it clear that any terror attack from Pakistan would trigger a decisive retaliation and that there would be no differentiation between terror groups and those who shelter and support them.

Across the border, Pakistan has claimed victory in the May conflict and promoted the Army Chief, Asim Munir, to the rank of Field Marshal. There are also no visible signs of a crackdown on groups like the LeT and JeM, and launch pads across the Line of Control remain active.⁵

The internal security situation in Pakistan saw a steady deterioration in 2025, with a rise in militant attacks. Islamabad has taken to blaming India, apart from Afghanistan, for this surge in violence. There are also accusations of India weaponising water after the Indus Water Treaty was held in abeyance.

As the year ends, the ceasefire, though in effect, is fragile and stands on shaky ground.

India-China Line of Actual Control (LAC)

Cautious Stabilisation

After the intense standoff that began in 2020, complete disengagement at all friction points had been completed by late 2024. The focus in 2025 was on ensuring that the LAC remains calm. While only one Corps Commander-level meeting was held in October 2025, junior local commanders met frequently. Indian Army Chief General Upendra Dwivedi stated that the situation has been improving since October 2024, with about 1100 ground-level interactions in the last year.⁶

⁵ The Economic Times. "Eight Terrorists Slain, 5 Pushed Back as Forces Foiled Every Infiltration Bid across LoC This Year: BSF IG." December 1, 2025.

<https://economictimes.indiatimes.com/news/defence/eight-terrorists-slain-5-pushed-back-as-forces-foiled-every-infiltration-bid-across-loc-this-year-bsf-ig/articleshow/125691961.cms?from=mdr>.

⁶ Singh, Mayank. "India-China Relations Have Improved a Lot over the Last Year: Army Chief General Dwivedi." The New Indian Express, November 17, 2025.

There was a noticeable uptick in high-level political engagements, with meetings between the Foreign Ministers and Special Representatives. On August 31, 2025, Prime Minister Modi met President Xi Jinping on the sidelines of the Shanghai Cooperation Organisation meeting in Tianjin. Both leaders welcomed the positive momentum and steady progress in bilateral relations and reaffirmed that the two countries were development partners and not rivals.⁷

The gradual thaw led to an easing of the visa regime, the restart of the Kailash Manasarovar Yatra, and the resumption of direct flights between the two countries. China has lifted export restrictions on fertilisers, rare-earth magnets, and tunnel boring machines, signalling a willingness to reduce friction in critical supply chains.⁸

However, de-escalation has yet to occur, and both militaries remain in a state of enhanced readiness along the LAC. The additional troops that were inducted after the 2020 crisis remain in place, and given that the disengagement process took 40 months, negotiations on de-escalation are likely to be prolonged.

Both countries also continued to upgrade border infrastructure. The Indian focus has been on improving connectivity to forward areas and reducing the infrastructural differential with China, long considered a strategic vulnerability. According to official data, 4,684 km of roads have been constructed since 2020. On December 7, Defence Minister Rajnath Singh inaugurated 125 strategic infrastructure projects built by the Border Roads Organisation.⁹

There was similar activity in the Eastern Sector, with the Sela Tunnel providing all-weather connectivity to Tawang. The Trans-Arunachal Highway, under construction, will run the entire length of the state, connecting 16 districts. A Frontier Highway will run closer to the LAC, improving access to the border areas.

<https://www.newindianexpress.com/nation/2025/Nov/17/india-china-relations-have-improved-a-lot-over-the-last-year-army-chief-general-dwivedi>.

⁷ Ministry of External Affairs, Government of India. "Prime Minister's Bilateral Meeting with Chinese President Xi Jinping (August 31, 2025)." Accessed December 21, 2025. https://mea.gov.in/press-releases.htm?dtl/40072/Prime_Ministers_bilateral_meeting_with_Chinese_President_Xi_Jinping_August_31_2025

⁸ "China Lifts Export Curbs on Fertilisers, Rare Earths and Machinery to India." Accessed December 21, 2025. <https://www.angelone.in/news/economy/china-lifts-export-curbs-on-fertilisers-rare-earths-and-machinery-to-india>.

⁹ Reporter, Staff. India Opens 125 Landmark Border Infrastructure Projects In Ladakh, Enhancing Strategic Connectivity - Defence News Defence Blog, Defence Aerospace News. Army. December 7, 2025. <https://www.defencestar.in/military/army/india-opens-125-landmark-border-infrastructure-projects-in-ladakh-enhancing-strategic-connectivity/10319/>.

India is upgrading airfields to support fighter aircraft operations. Nyoma, a high-altitude airfield at 13,700 feet in eastern Ladakh, was inaugurated on November 12. It has become the third air base in Ladakh after Leh and Thoise.¹⁰

China is also upgrading its road and rail network, but its primary focus has been on developing its air infrastructure. This was a critical vulnerability that impacted its ability to conduct air operations from the high-altitude Tibetan Plateau. In December 2025, the Wall Street Journal reported that over the past few years, China has built or modernised 16 airbases and helipads, increasing runway lengths and constructing hardened shelters for fighter aircraft. These “dual-use” airports host fighter jets, heavy transport aircraft, and multiple drone types, including Sharp Sword, Soaring Dragon, CH-4, and CH-5.¹¹

Although both sides appear committed to maintaining calm along the LAC, the heavy deployments on both sides are unlikely to be thinned out, and the risk of local incidents triggering an escalation remains.

India-Myanmar Border

The porous India-Myanmar border remains a concern. In February 2024, Indian Home Minister Amit Shah announced that the Free Move Regime (FMR), which allowed residents of both countries to cross up to 16 km without a visa, would be scrapped. In addition, the India-Myanmar border would be fenced to prevent illegal migration, drug trafficking and movement of insurgents.

Both these decisions met with resistance from the Naga, Mizo, and Kuki-Zo tribal groups, who fear being cut off from their ethnic kin who reside on both sides of the border. The state assemblies of Nagaland and Mizoram passed resolutions opposing border fencing and asked the government to halt the work.

Partially backtracking on its decision, New Delhi has not yet formally scrapped the FMR, but has imposed tighter rules. Visa-free cross-border travel has now been

¹⁰ Hindustan Times. “IAF Chief Lands C-130J, Inaugurates Nyoma Airbase in Ladakh.” November 12, 2025. <https://www.hindustantimes.com/india-news/iaf-chief-lands-c-130j-inaugurates-nyoma-airbase-in-ladakh-101762952103449.html>.

¹¹ Mandhana, Niharika, Josh Chin, and Camille Bressange. “Chinese Forces Battle Dizzying Altitudes to Expand Military Footprint.” World. Wall Street Journal, December 5, 2025. <https://www.wsj.com/world/china/chinese-forces-battle-dizzying-altitudes-to-expand-military-footprint-c9350bbd>.

limited to 10 km and 7 days, and requires biometric permits issued by Assam Rifles at designated crossings.¹²

In 2024, the government had approved Rs 31,000 crore for fencing the India-Myanmar border. However, only about 10 km of the 1,643 km border has been fenced, and work is underway on another 20 km in Manipur. With strong opposition from Nagaland and Mizoram, the progress on fencing appears uncertain. The National Unity Government (NUG) of Myanmar has also urged the Indian government to suspend work on border fencing, arguing that the decision is unilateral and that the border has unresolved disputed patches.¹³

Indian insurgent groups have long maintained sanctuaries in Myanmar's frontier regions. There are reports that the Myanmar Army has forged an alliance with some of these groups to help fight the anti-junta People's Defence Forces. India can therefore no longer rely on Myanmar's Army to keep a check on Indian insurgent groups and would have to resort to unilateral action.

On July 13, a wave of drone strikes struck camps belonging to the United Liberation Front of Asom - Independent (ULFA-I) and the National Socialist Council of Nagaland - Khaplang (NSCN-K) in Myanmar's Sagaing Region. In a statement released by ULFA-I, the group stated that 19 of its members were killed and 19 more were injured in the strikes.¹⁴ India has officially denied conducting the operation, but the scale of the operation suggests the involvement of the Indian military.

Looking ahead, the India-Myanmar border will remain a challenge due to its porous nature, ethnic sentiment against its fencing, and the spillover effect of the Myanmar civil war.

¹² The Times of India. "Porous India-Myanmar Border a Battlefield of Security & Identity." December 6, 2025. <https://timesofindia.indiatimes.com/city/guwahati/porous-india-myanmar-border-a-battlefield-of-security-identity/articleshow/125808725.cms>

¹³ <https://www.asianconfluence.org/>. "Securing the Northeast: India's Border Fence with Myanmar." Accessed December 22, 2025. <https://www.asianconfluence.org/publication-details-full/securing-the-northeast-india-s-border-fence-with-myanmar>.

¹⁴ "Drone Strikes Hit Insurgent Camps in Myanmar; Top ULFA-I Commander Killed." July 13, 2025. <https://www.borderlens.com/2025/07/13/drone-strikes-hit-insurgent-camps-in-myanmar-top-ulfa-i-commander-killed/>.

Organisational Restructuring

Integrated Theatre Commands

The Ministry of Defence declared 2025 as the 'Year of Reforms.' Among the nine areas identified for focused intervention, the first was to "bolster Jointness & Integration initiatives and facilitate establishment of the Integrated Theatre Commands."¹⁵

Steps towards achieving greater jointness were evident in 2025. Joint doctrines on cyber operations, amphibious operations, special forces, airborne and heliborne operations, and multi-domain ops were released.¹⁶ Joint military stations have been established, and the education corps of the three services has been merged. However, there is still no consensus among the three services on the structure of the theatre commands and the responsibilities of the theatre commander.

The successful conduct of Operation Sindoor, forcing Pakistan to sue for a ceasefire within 88 hours, was attributed to joint planning and the integrated application of India's military power. Paradoxically, this success also fuelled a counterargument. If the services could achieve jointness under the existing system, sweeping reorganisation was unnecessary, or could be approached more cautiously. Speaking at Ran Samwad, a tri-service seminar in August, Air Force Chief, Air Chief Marshal A P Singh, cautioned against rushing into the creation of Integrated Theatre Commands (ITCs). He suggested that a start be made on setting up a joint planning and coordination centre in New Delhi, and that any other structures could be considered later. Calling air power the "most flexible and lethal arm of combat", he said jointness must not come at the cost of service-specific expertise. He also cautioned against joint structures that could add layers to the decision-making process.¹⁷

The Air Chief's remarks sparked a debate, with Army Chief General Upendra Dwivedi stressing that theatre commands are crucial for seamlessly executing all tasks

¹⁵ "Ministry of Defence Declares 2025 as 'Year of Reforms.'" Accessed December 23, 2025. <https://www.pib.gov.in/www.pib.gov.in/Pressreleaseshare.aspx?PRID=2089184>.

¹⁶ "CDS Releases Joint Doctrines for Special Forces Operations and Airborne & Heliborne Operations at RAN SAMWAD." Accessed December 23, 2025. <https://www.pib.gov.in/www.pib.gov.in/Pressreleaseshare.aspx?PRID=2161134>.

¹⁷ Singh, Mayank. "Retain Core Competence of Each Service, Avoid Hasty Restructuring: Air Chief Marshal AP Singh." The New Indian Express, August 26, 2025. <https://www.newindianexpress.com/nation/2025/Aug/26/retain-core-competence-of-each-service-avoid-hasty-restructuring-air-chief-marshall-ap-singh>.

in a conflict. Navy Chief Admiral DK Tripathi shared the Army Chief's opinion, stating, "The Navy was committed to 'theaterisation' as the ultimate goal."¹⁸

In November, the Chief of Defence Staff, General Anil Chauhan, stated that 90% of theatre command planning is complete, with remaining refinements based on operational lessons.¹⁹ 2026 could see the rollout of the ITCs.

Capability Development

Indian Army

The Indian Army focused on enhancing its firepower, mobility, and technological edge, drawing lessons from Operation Sindoora. Unmanned systems were a centrepiece of new procurements. The Army has placed orders worth over Rs 5,000 crore for indigenous drones covering a spectrum of capabilities, from short-range kamikaze strikes to long-range precision munition delivery and reconnaissance.²⁰ Another proposal to buy 850 Kamikaze drones worth Rs 2,000 crore is under consideration.²¹ Reports indicate that the Army is looking to induct around 30,000 drones over the next few years.

In March, the Ministry of Defence (MoD) signed contracts for the procurement of 307 Advanced Towed Artillery Gun System, 155mm calibre guns, and 327 high-mobility 6x6 gun towing vehicles, at a cost of around Rs 6,900 crore. A Request for Proposal has also been issued for three regiments of Quick Reaction Surface-to-Air Missile. These acquisitions will provide a much-needed boost for the modernisation of artillery and air defence systems. However, induction of these systems will not commence till 2027.

¹⁸ "Navy and IAF Chiefs Diverge on Joint Control." Accessed December 23, 2025. <https://www.telegraphindia.com/india/navy-and-army-chiefs-diverge-on-joint-control-as-theaterisation-debate-deepens-prnt/cid/2120054>.

¹⁹ Siddiqui, Huma. "India's CDS on Theaterisation: '90% of Planning Complete, Future Wars Demand Integration and Innovation.'" Bharat Shakti, November 4, 2025. <https://bharatshakti.in/indias-cds-on-theaterisation-90-of-planning-complete-future-wars-demand-integration-and-innovation/>.

²⁰ Desk, RA Editorial. "Boost to Aatmanirbharta: Indian Army Orders ₹5,000 Crore Indigenous Drones Post-Rigorous Trials." *Raksha-Anirveda.Com*, December 16, 2025. <https://raksha-anirveda.com/boost-to-atmanirbharta-indian-army-orders-%25E2%2582%25B95000-crore-indigenous-drones-post-rigorous-trials/>

²¹ Anand, Kshitij. "Indian Army to Buy 850 Kamikaze Drones Worth Rs 2000 Crore." The Economic Times, December 19, 2025. <https://economictimes.indiatimes.com/news/defence/indian-army-to-buy-850-kamikaze-drones-worth-rs-2000-crore/articleshow/126081458.cms?from=mdr>.

Another contract was signed for 156 Prachand Light Combat Helicopters, 90 of which will go to the Army. Deliveries will commence in 2028 and continue for five years.²² Meanwhile, the Army has received the final batch of three AH-64E Apache attack helicopters from the US, completing its six-unit fleet at the Army Aviation Squadron based in Jodhpur, Rajasthan.²³

New organisation structures are also being created. These include the Rudra all-arms Brigades, Bhairav light commando battalions for special operations, and specialised artillery regiments combining guns, drones, and loitering munitions. Each of the approximately 380 infantry battalions will now have an Ashni drone platoon. These changes reflect a shift toward joint operations, dispersed lethality, and tech-enabled combined arms.²⁴

Indian Navy

The Indian Navy maintained a high tempo of operational activity during the year, with an aircraft carrier task group being deployed in support of Operation Sindoora, round the clock mission based activities throughout the year in the Indian Ocean, an expanded presence across the Indo-Pacific and the Mediterranean Sea (ranging from Guam in the East to Casablanca in the West), and exercises with a multitude of foreign countries including the US, France, Japan, UK, Russia, Australia, South Korea and the Philippines.

The following ships were commissioned by the Indian Navy in 2025:

- On January 15, the Navy simultaneously commissioned INS Surat (the fourth and final unit of the Visakhapatnam-class Project 15B stealth destroyers), INS Nilgiri (the first of the new Project 17A stealth frigates), and INS Vagsheer (the sixth and final Scorpene-class submarine).
- Two Project 17A frigates, INS Himgiri and INS Udaygiri, were commissioned on August 26.

²² The Week. "I56 Attack Choppers Incoming Soon: When Will Indian Army, IAF Get to Deploy 156 LCH Prachand?" Accessed December 23, 2025.

<https://www.theweek.in/news/defence/2025/03/31/i56-attack-choppers-incoming-soon-when-will-indian-army-iaf-get-to-deploy-156-lch-prachand.html>.

²³ Trivedi, Saurabh. "Indian Army Inducts Final Three Apache Helicopters." India. The Hindu, December 16, 2025. <https://www.thehindu.com/news/national/indian-army-receives-final-batch-apache-helicopters/article70403334.ece>.

²⁴ The Tribune. "Western Command Validates Operational Preparedness of New Ashni Specialist Drone Platoons." Accessed December 23, 2025.

<https://www.tribuneindia.com/news/defence/western-command-validates-operational-preparedness-of-new-ashni-specialist-drone-platoons/>.

- INS Tamal, the last Indian Navy ship to be built abroad, was commissioned on July 01 at Yantar Shipyard, Kaliningrad, Russia.
- Three Anti-Submarine Warfare Shallow Water Crafts, and one Survey Vessel Large were commissioned during 2025.

The IN commissioned its second MH60R helicopter squadron, INAS 335, at Goa on December 17. India has received about 15 of the 24 helicopters contracted for.²⁵ India also signed a deal with the US for sustainment support of the helicopter fleet for five years.

India has signed an agreement with France to procure 26 Rafale-Marine fighter jets, valued at approximately ₹63,000 crore. The new jets are intended to operate from India's aircraft carriers, INS Vikrant and INS Vikramaditya and will replace the Navy's ageing fleet of Russian-made MiG-29K jets, which have faced maintenance and serviceability issues.²⁶

India successfully conducted the second test of the K-4 Submarine Launched Ballistic Missile (SLBM) in December. This increases the strike range of India's SLBMs from 750 to 3500 Km. The induction of the third ballistic missile submarine, INS Aridhaman, in 2026 will further strengthen India's nuclear triad.

The Indian Navy has been inducting new platforms, but some capability gaps remain. Indian ships do not have anti-ballistic missile defence capability, and the first naval ships to be equipped with this capability will be the Project 18 destroyers, which are still in the planning stage.

The Indian Navy is down to 15 conventional submarines, and cost negotiations for the procurement of six Project 75I submarines equipped with Air Independent Propulsion have not yet been completed.²⁷ There are also no operational mine countermeasures vessels in service with the Navy.

²⁵ "Indian Navy To Commission INAS 335 (OSPREYS)." Accessed December 23, 2025. <https://www.pib.gov.in/www.pib.gov.in/Pressreleaseshare.aspx?PRID=2203716>.

²⁶ "India Acquire Rafale Maritime Version - Google Search." Accessed December 23, 2025. https://www.google.com/search?q=India+acquire+Rafale+maritime+version&oq=India+acquire+Rafale+maritime+version&gs_lcp=EgZjaHJvbWUyBggAEEUYOTIJCAEQIRgKGKABMgcIAhAhGI8CMgcIAxAhGI8C0gEJMjE0NDRqMGo0qAIAAsAIB&sourceid=chrome&ie=UTF-8.

²⁷ The Tribune. "As INS Sindhughosh Signs off, Navy down to 1990s' Strength." Accessed December 23, 2025. <https://www.tribuneindia.com/news/premium/as-ins-sindhughosh-signs-off-navy-down-to-1990s-strength/>.

Indian Air Force (IAF)

In September, the IAF retired the last two MiG-21 squadrons, bringing its fighter squadron strength down to 29, against an authorised strength of 42. In August 2025, the government placed an order of 97 Tejas Mk1A with Hindustan Aeronautics Limited (HAL). This is in addition to the order for 83 Mk1A placed in 2021.

However, no Mk1A aircraft has been delivered due to a delay in the supply of the GE F404 engines. Engine supply resumed in March 2025, and HAL has been ramping up production capacity. A new Tejas production line in Nashik has been inaugurated, enabling HAL to produce up to 24 Tejas Mk1A per year by 2026-27.²⁸ Even at this rate, the deliveries of the current 180 aircraft on order will stretch to 2033.

To overcome its shortfalls, the IAF is procuring 12 Su-30 MKI aircraft and looking to upgrade 84 existing Su-30s.²⁹ Some media reports indicate that the IAF has proposed the procurement of 114 Rafale fighters under a deal worth \$23 billion. India is pushing for a majority of these aircraft to be manufactured in India.³⁰

The IAF has received 16 C-295 medium transport aircraft being manufactured by Airbus in Spain. The remaining 40 aircraft under the 56-aircraft deal are to be built/assembled in India by Tata Advanced Systems.³¹

A combination of limited numbers and serviceability challenges has constrained IAF's aerial refuelling capacity. To overcome its immediate problems, a contract was concluded with Metrea for wet leasing one KC-135 Flight Refuelling Aircraft. The IAF

²⁸ The Times of India. "First Tejas-Mk1A from Nashik Completes Maiden Flight; Gets Water Cannon Salute – Watch." October 17, 2025. <https://timesofindia.indiatimes.com/india/first-tejas-mk1a-from-nashik-completes-maiden-flight-induction-to-take-time/articleshow/124622119.cms>.

²⁹ Writer, Staff. "Future-Ready and Soaring High: Indian Air Force Accelerates Its Modernisation Drive." Indian Aerospace and Defence Bulletin - News for Aerospace and Defence in India, November 1, 2025.

<https://www.iadb.in/2025/11/01/future-ready-and-soaring-high-indian-air-force-accelerates-its-modernisation-drive/>.

³⁰ "IAF-Rafale Jet Deal: MoD Flags 'Incomplete' Proposal, Pushes Dassault For Deeper Make-in-India Commitment." RNA - Research, News & Analysis, n.d. Accessed December 24, 2025. <https://rnamedia.in/airforce/iaf-rafaele-jet-deal-mod-flags-incomplete-proposal-pushes-dassault-for-deeper-make-in-india-commitment/9811>.

³¹ The Economic Times. "India Receives Airbus C-295 Military Transport Aircraft from Spain." August 2, 2025. <https://economictimes.indiatimes.com/news/defence/spain-recieves-last-batch-of-airbus-c-295-military-transport-aircraft-from-india/articleshow/123059677.cms?from=mdr>.

has issued a tender for six mid-air refuelling aircraft with Israel Aerospace Industries and its Indian partner HAL.³²

The MoD has approved the procurement of six additional Airborne Early Warning & Control (AEW&C) systems, based on the Embraer aircraft. There are also plans to induct another six AEW&C systems being developed by the DRDO and to be mounted on Airbus A321 aircraft, but these could take time for aircraft modification and system integration.³³

Indigenisation

2025 saw a continued focus on indigenisation. Although India was the second-largest importer of arms in the 2020-24 period, its arms imports declined by 9.3% compared to 2015-19.³⁴ In the FY2024-25, more than 90% of the total contracts, worth Rs 1,68,922 crore, were awarded to the domestic industry.³⁵ More than 65% of India's defence equipment is now produced domestically, a shift from the past, when about 70% was imported.

INS Udaygiri, commissioned in 2025, was the 100th indigenously designed vessel highlighting India's steady progress toward maritime self-reliance. In the three categories of Float, Move and Fight, indigenisation has been achieved to the extent of about 90%, 60% and 50%, respectively, indicating a shortfall in the third category.³⁶

India's defence exports have surged to an all-time high of Rs 23,622 in FY 2024-25, and the government has set an ambitious target of ₹50,000 crore in exports by 2029.³⁷ India exports defence equipment to about 100 countries, with the three top destinations in 2023-24 being the United States, France and Armenia.

Indian industry now produces fuselage sections for Boeing's Apache attack helicopters, cabins for Sikorsky S-92 helicopters, empennages for Lockheed Martin's

³² Philip, Snehesh Alex. "IAF Moves for Mid-Air Refuellers, Israel Firm in Partnership with HAL Emerges as the Frontrunner." ThePrint, December 9, 2025. <https://theprint.in/defence/iaf-moves-for-mid-air-refuellers-israel-firm-in-partnership-with-hal-emerges-as-the-frontrunner/2801853/>.

³³ Philip, Snehesh Alex. "Defence Ministry Clears Key 'Eye in the Sky' Project to Catch up with Pakistan." ThePrint, March 20, 2025. <https://theprint.in/defence/defence-ministry-clears-key-eye-in-the-sky-project-to-catch-up-with-pakistan/2557708/>.

³⁴ "Top 10 Largest Arms Importing Countries (2020-2024): India's Position Revealed." The Indian Express, June 24, 2025. <https://indianexpress.com/article/trending/top-10-listing/top-10-largest-arms-importing-countries-2020-2024-indias-position-revealed-9880245/>.

³⁵ Press Release: https://invest.up.gov.in/wp-content/uploads/2025/03/2-Make_300325.pdf

³⁶ Sailing Towards Self-reliance.

<https://www.pib.gov.in/PressNoteDetails.aspx?NoteId=156310&ModuleId=3®=1&lang=1>

³⁷ Press Release: https://invest.up.gov.in/wp-content/uploads/2025/03/2-Make_300325.pdf

C-130J transport aircraft, and wings for the F-16 fighter aircraft. Tata is building the first assembly line in India for the Airbus C295 transport aircraft.

Foreign defence companies are seeking to expand their presence in India. In partnership with Tata Advanced Systems (TASL), Airbus is establishing an assembly line to build the H125 helicopter. Safran and Bharat Electronics have signed a joint venture to produce the HAMMER precision-guided air-to-ground weapon. Liquid Robotics (a Boeing company) signed an MoU with Sagar Defence Engineering to co-develop and co-produce Autonomous Surface Vessels in India. Dassault Aviation is partnering with TASL to manufacture key fuselage sections of the Rafale fighter jet in India.

Looking at 2026

The experiences of 2025, from the crisis with Pakistan in May to the protracted standoff with China, have underscored the reality of a “two-front threat” for India. This understanding will carry over into 2026, requiring a high level of operational readiness on both fronts.

With India having laid down its redlines on responding to terror attacks, and Pakistan refusing to rein in terror groups, the possibility of another crisis along the western border remains high. On the Northern border, 2026 could see some incremental pullback of troops if there is progress on de-escalation. However, structural distrust persists, limiting any significant redeployment from the LAC, even as infrastructure improvements continue.

The Army will remain engaged in combating terrorism and insurgencies in Jammu and Kashmir and the Northeast. In Kashmir, where terrorism is at a low ebb, the focus will be on preventing a resurgence. In the Northeast, while violence is contained, the porous nature of the India-Myanmar border remains an area of concern.

On the capability development front, much work remains to be done across the three services. The Army needs to replace its existing fleet of tanks, infantry combat vehicles, and air defence systems. The process is underway, but needs to be sped up in 2026.

The commissioning of frigates under Project 17A will be completed by 2026, and the final ship of the Visakhapatnam class of destroyers was commissioned in 2025. There is an urgent need to approve Projects 17B and 18 for the new generation of frigates and destroyers, respectively. 2026 should also see the signing of the contract for six

AIP-equipped conventional submarines under Project 75(I). Any slippage in this could push the first delivery to the mid-2030s.

The dwindling Air Force fighter fleet demands a serious review. In June 2025, the Pakistan government announced that China had offered to sell the fifth-generation Shenyang J-35 stealth aircraft, Shaanxi KJ-500 airborne early warning and control aircraft and the HQ-19 surface-to-air missile system.³⁸ In December 2025, the US government approved a \$686 million package for Pakistan's F-16 aircraft covering hardware, software upgrades and sustainment support.³⁹ In order to ensure the IAF's combat edge, the decision on the procurement of 114 fighters must be taken in 2026.

The Central Government Expenditure (CGE) pattern shows that defence spending has steadily declined from 17.43% of CGE in FY 2018-19 to 13% in FY2025-26. As a percentage of GDP, the allocation has dropped from 2.3% to 1.9% over the same period. Capital expenditure constitutes about 26% of the total budget. With little scope for cutting pay and allowances or expenditure on operational readiness, modernisation can be accelerated only if budgetary allocation to defence is increased.

³⁸ Default. "Pakistan Announces Chinese J-35 Aircraft Offer." June 9, 2025. <https://www.janes.com/osint-insights/defence-news/air/pakistan-announces-chinese-j-35-aircraft-offer>.

³⁹ Default. "US Approves Upgrade-Related Sale for Pakistan F-16s." December 12, 2025. <https://www.janes.com/osint-insights/defence-news/defence/us-approves-upgrade-related-sale-for-pakistan-f-16s>.



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