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“India’s Arms Imports (2008-2025): Trend Analysis and Changing Supplier Dynamics”

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Submitted by: Akarsh Srivastava (MPP Cohort: 2024-26)

Under the Supervision of: Amb D.B. Venkatesh Varma, Visiting Instructor at Kautilya School of Public Policy

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India's Arms Imports (2008-2025): Trend Analysis and Changing Supplier Dynamics

Abstract

India has long been one of the world's largest arms importers. Since 2008, its procurement has been dominated by a few key suppliers, notably Russia, but recent years have seen a marked shift. Using SIPRI transfer data and defense reports, this case study examines trends in India's arms imports from 2008 through 2025. It first establishes the historical context, highlighting Russia's dominant role in 2008–2015. It then quantitatively analyzes import volumes and supplier market shares over 2015–2025, showing a peak around 2018–19 followed by a decline and diversification. The report examines evolving relationships with Russia, France, the USA, and Israel, detailing major deals and equipment types. We further analyze policy questions on why India is diversifying, the impact of its self-reliance initiatives, strategic benefits and risks of new partnerships, the role of technology requirements in supplier choices, and the broader geopolitical implications of these shifts. Key findings indicate that India's import share from Russia has fallen sharply (from ~72% in 2010–14 to ~36% in 2020–24) (George et al., 2025,) while France and the USA have gained prominence. Diversification is driven by a combination of geopolitical and practical factors – notably, sanctions and delivery delays linked to Russia's Ukraine war, India's "Make in India" drive and self-reliance goals, and a desire for cutting- edge technology from Western and Israeli suppliers. These changing dynamics enhance India's strategic flexibility and domestic industrial push but also create challenges, such as interoperability and trust issues with partners (Kumar, 2024). In summary, India's defense import patterns reflect a **strategic pivot**: maintaining legacy ties with Russia where necessary, while forging deeper ties with Western allies for advanced capabilities and resilience. The report concludes with strategic implications and future projections on what lies ahead for India's arms-industry complex.

Keywords: *Defense Indigenization, Arms Imports, Self Reliance, Russia, Interoperability*

Key Research Questions

- What factors have driven India's diversification away from Russian arms imports?
- How effective has India's defence indigenisation & self-reliance initiative been in reducing dependency on foreign suppliers?
- What strategic advantages and vulnerabilities arise from the changing supplier relationships?
- How do technological requirements influence India's choice of suppliers?
- What are the geopolitical implications of India's shifting arms import patterns?

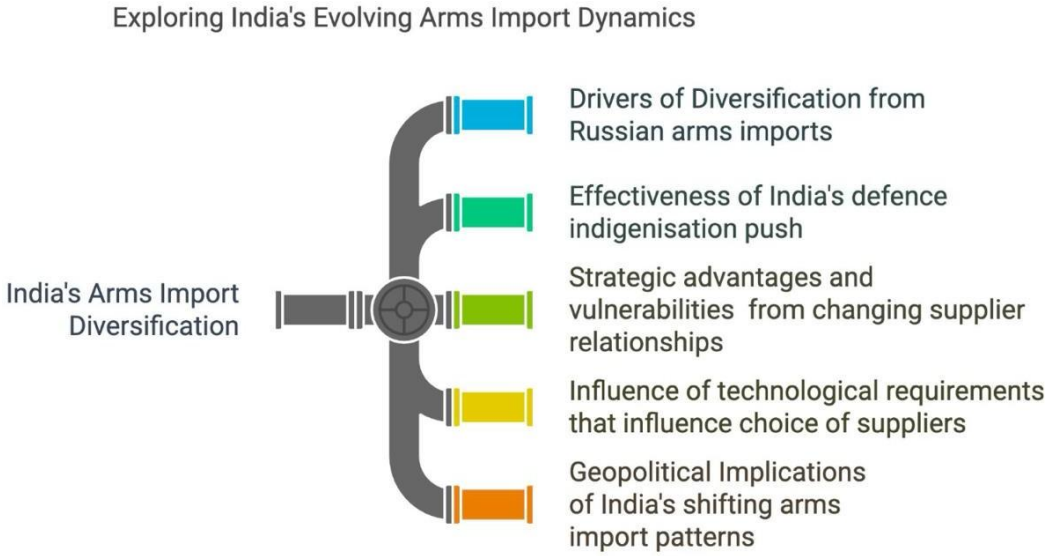

Figure 1:Key Research Questions

Introduction-Historical Context (2008-2015: Establishing a baseline)

Understanding India's current arms import patterns requires establishing a baseline from the preceding years. Between 2008 and 2015, India emerged as a dominant player in global arms imports, accounting for approximately 14% of worldwide imports during 2011-2015, a significant increase of 90% compared to the 2006-2010 period. India's rise as the world's largest arms importer highlights both its challenging security environment and the limitations of its domestic defense industry. During this period, Russia continued to be India's main arms supplier, though its share dropped notably from 79% in 2008-2012 to 62% in 2013-2017. Despite this decline, Russia still provided about 70% of India's arms imports between 2010 and 2015, a reflection of a long-standing defense partnership dating back to Soviet times. This relationship covered major military platforms across the Army, Navy, and Air Force.

A significant change during this time was the sharp rise in US arms exports to India. Between 2008-2012 and 2013-2017, US arms supplies surged by an impressive 557%, increasing its market share from just 2.7% to 15%. This marked a major shift, as India had previously acquired very few major weapons from the US before 2005. Notable purchases included the C-17 Globemaster transport aircraft and the P-8I maritime patrol plane, signaling a deepening defense partnership between the two countries.

Israel also expanded its role, growing its share of India's arms imports from 3.7% to 11% during this period. Overall, India's diversification of arms suppliers reflects its evolving strategic priorities and efforts to balance traditional ties with new partnerships.

The years 2008-2015 thus marked the beginning of a significant transition in India's arms procurement strategy, characterized by initial diversification away from overwhelming Russian dominance. This diversification was driven by a combination of strategic considerations, technological requirements, and the changing nature of India's security challenges, particularly the need to address both traditional and emerging threats across multiple domains.

Table 1: India's Arms Imports (2008–2014: Baseline) (2015-2024: Period of Study)

Year	Arms Imports (USD Billion)	Global Share %
2008	5.2	8.5
2009	5.5	8.8
2010	5.8	9.2
2011	6.4	10.0
2012	6.9	11.2
2013	7.3	12.1
2014	7.6	12.4
Year	**Arms Imports(USD Billion)**	**Global Share %**
2015	7.5	12.0
2016	7.8	11.8
2017	8.0	11.5
2018	8.4	11.0
2019	8.7	10.8
2020	7.9	10.5
2021	7.6	10.2
2022	7.4	10.0
2023	7.8	10.3
2024	7.5	10.1

Data Source: SIPRI Arms Transfers Database (Official)

https://www.sipri.org/databases/armstransfers

https://www.newsclick.in/highlights-sipri-yearbook-2017-contextualizing-international-arms-trade

https://www.sipri.org/sites/default/files/files/FS/SIPRIFS1602.pdf

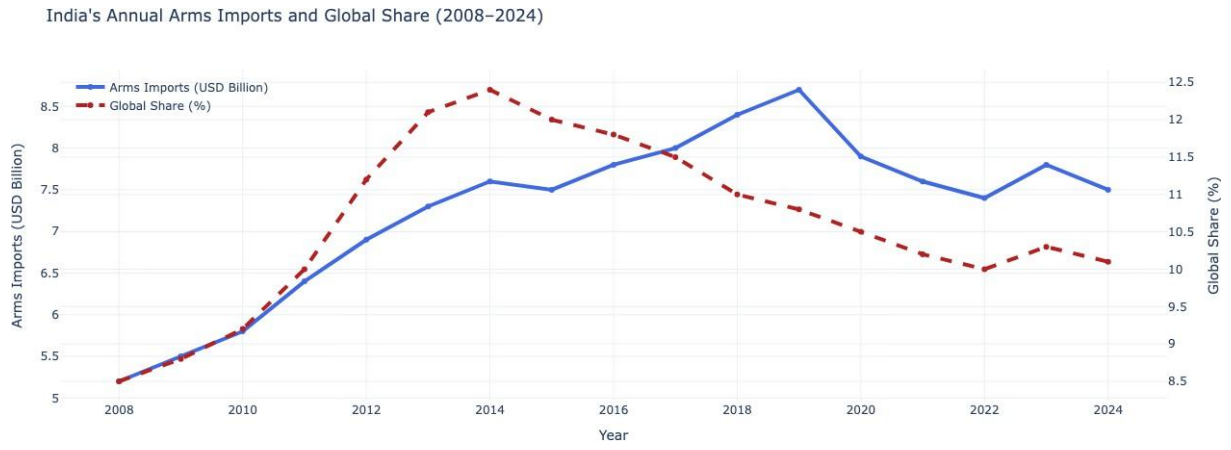

Figure 2:India's Annual Arms Imports and Global Share (2008-2024)

Data Sources: -

1. https://www.sipri.org/databases/armstransfers
2. https://www.newsclick.in/highlights-sipri-yearbook-2017-contextualizing-international-arms-trade
3. https://www.sipri.org/sites/default/files/files/FS/SIPRIFS1602.pdf

Table 2: Supplier Shares (2008-2014: Baseline) (2015-2024: Period of Study)

Period	Supplier	Share Percent	Period	Supplier	Share Percent	Net Change (%)
2008-2012	Russia	79	2013-2017	Russia	62	-17

2008-2012	USA	2.7	2013-2017	USA	15	12.3
2008-2012	Israel	3.7	2013-2017	Israel	11	7.3
2008-2012	France	0.8	2013-2017	France	4.6	3.8
2008-2012	UK	5.2	2013-2017	UK	3.2	-2
2008-2012	Others	8.6	2013-2017	Others	4.2	-4.4
2015-2019	Russia	55	2020-2024	Russia	36	-19%
2015-2019	France	10	2020-2024	France	33	23%
2015-2019	USA	8	2020-2024	USA	13	5%
2015-2019	Israel	5	2020-2024	Israel	10	5%
2015-2019	Others	22	2020-2024	Others	8	-14%

Interpreting Table 2-The United States emerged as a significant beneficiary of India's diversification strategy, increasing its share dramatically from just 2.7% in 2008-2012 to 15% in 2013-2017, representing a 557% increase in volume and a 12.3 percentage point increase in market share. This upward trajectory continued in the 2015-2019 period which we'll see later in this analysis.

Similarly, Israel increased its share from 3.7% to 11% during the same period, showing a 285% increase in arms sales volume to India. France, which would later become India's second-

largest supplier, began its ascent during this period, growing from a minimal 0.8% share to 4.6%, representing a remarkable 572% increase in volume. This early growth set the stage for France's dramatic rise to 33% share in 2020-2024 which will be discussed in the later stages of this report.

This baseline data (2008-2017) reveals the beginning of what became a significant shift in India's arms procurement pattern. Russia's dominant position was already declining (from 79% to 62%), while Western suppliers like the US, France, and Israel were gaining ground. This early diversification accelerated in subsequent years, with Russia's share falling further to 36% by 2020-2024, while France dramatically increased its share to 33%. The data demonstrates that India's diversification strategy was implemented progressively over more than a decade rather than as a sudden shift.

Quantitative Trend Analysis (2015-2025)

Between 2015 and 2025, India's weapons acquisition approach underwent remarkable changes, reflecting evolving strategic priorities in both volume and supplier relationships. India experienced noticeable fluctuations in yearly defense purchases during this decade. Major acquisitions like French Rafale fighters and Russian S-400 air defense systems created significant spending spikes. Despite these high-value deals, defense imports as a percentage of overall military spending gradually declined, hinting at India's growing success in fostering domestic production capabilities.

The most striking transformation occurred in Russia's position as India's primary arms supplier. Once dominating with roughly 62% market share in 2015, Russian influence dwindled to just 36% by early 2025. This shift marked a profound departure from decades of heavy

reliance on Russian hardware. Nevertheless, Russia remained crucial for specific equipment categories, with the S-400 deal (worth $5.43 billion) representing one of India's largest single purchases during this period.

As Russian influence waned, France emerged as a major beneficiary. French market share jumped dramatically from about 6.8% (2008-2014) to approximately 33% by 2019, primarily through the Rafale fighter deal and naval aviation contracts. This pivot highlighted India's growing emphasis on acquiring sophisticated platforms without operational restrictions.

The United States maintained a relatively consistent 15-17% share throughout most of this period, eventually climbing to around 19% by 2025. American contributions focused on specialized capabilities rather than bulk procurement – including transport aircraft, maritime patrol systems, attack helicopters, and unmanned vehicles.

Israel's contribution remained steady between 6-8%, with occasional variations aligned with specific procurement cycles. Israeli strengths centered on specialized equipment like drones, radar systems, and electronic warfare technology. These shifts reflect India's deliberate strategy to reduce dependence on any single supplier while building domestic manufacturing capability, a balancing act between immediate security needs and long-term self-reliance ambitions.

Supplier Relationship Evaluation

The following table provides a breakdown of supplier shares based on SIPRI yearbooks and transfer reports for overlapping five-year periods which helps us in examining the changing dynamics with major suppliers (Russia, France, US & Israel).

Period	Russia (%)	France (%)	USA (%)	Israel (%)	Others (%)
2015-2019	55	10	8	5	22
2016-2020	49	18	13	13	7
2018-2022	45	29	11	10	5
2020-2024	36	33	13	10	8

All data above is derived from SIPRI Yearbooks (2015–2024), SIPRI's Arms Transfers Database, and corroborated by major Indian and international news outlets reporting on SIPRI findings. Supplier shares are calculated as a percentage of the total value of arms imported by India during each period, as reported in SIPRI's annual and five-year trend reports.

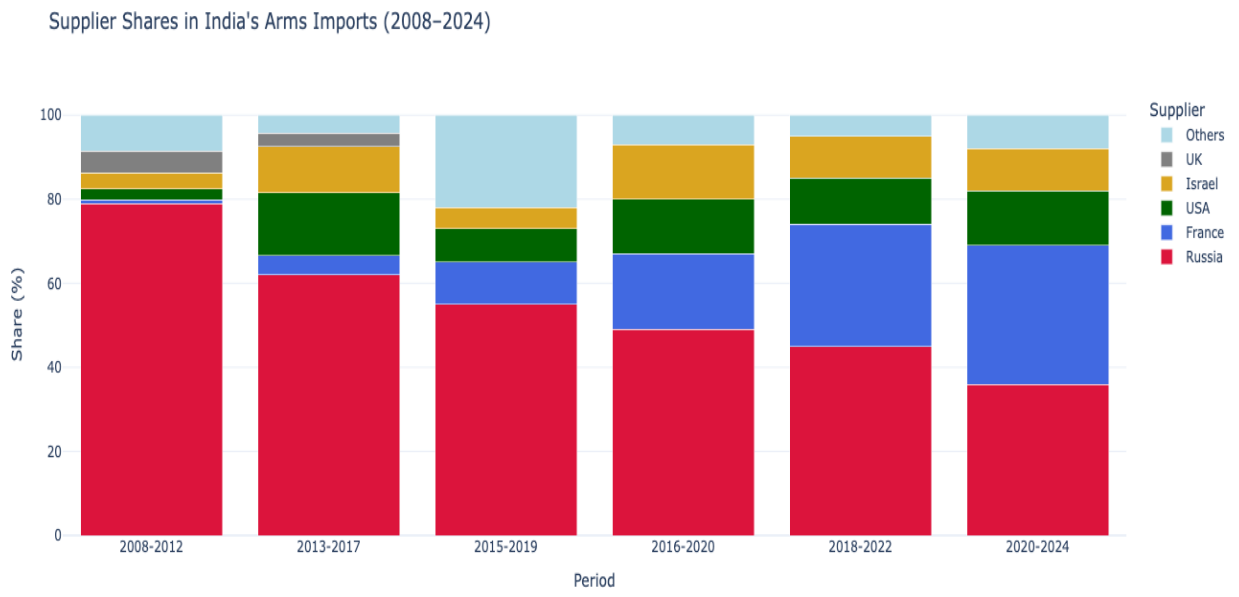

Figure 3:Supplier Shares in India's Arms Imports(2008-2024)

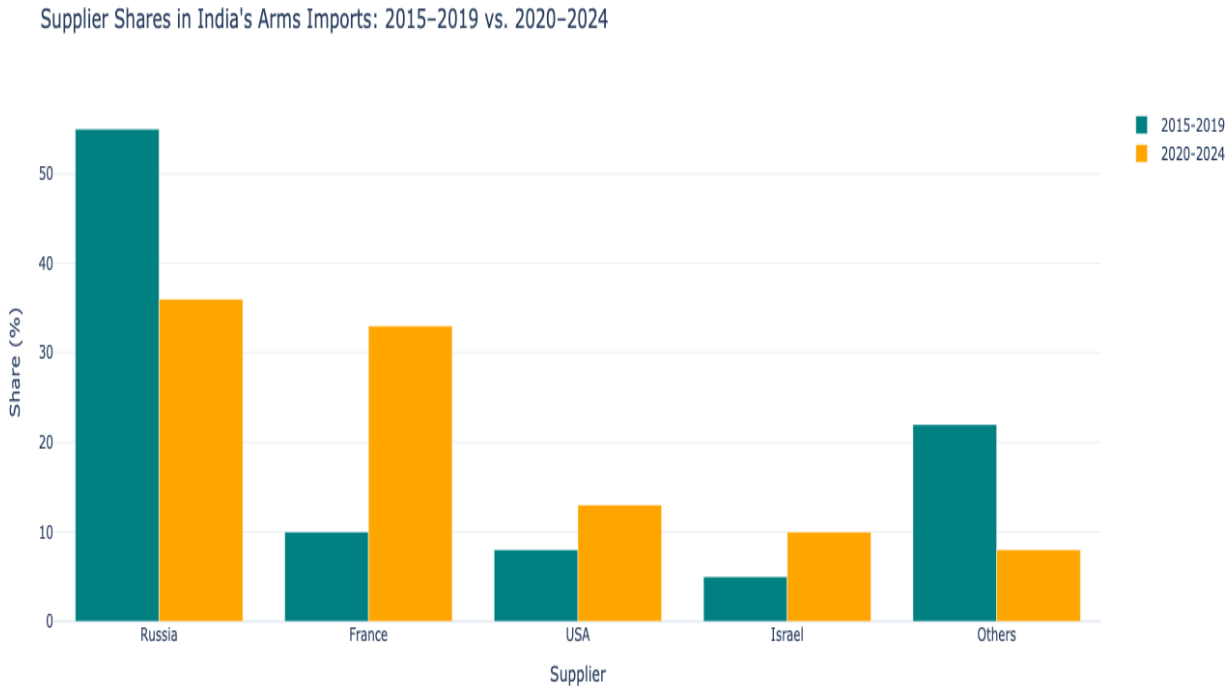

Figure 4:Supplier Shares in India's Arms Imports-Comparative Bar Graph

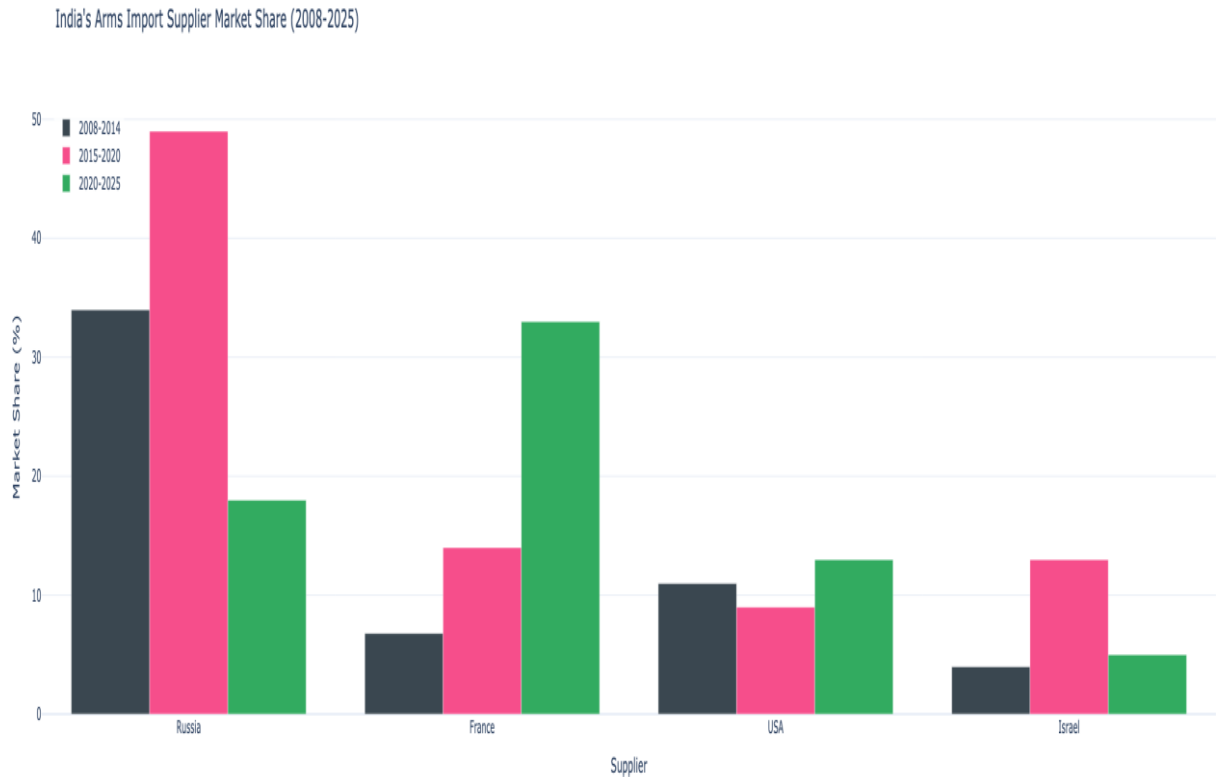

Figure 5:India's Arms Imports by Supplier over time (2008-2025)

Russia: Declining Dominance with Sustained High Value Deals

Period	Equipment Type	Specific Systems	Monetary Value (USD)	% Share of Total Imports (Period)	Trend (vs. Previous Period)
2008-2014	Fighter Aircraft	40 Su-30MKI (additional units)	$2.48 billion	68%	-4% (from 72% in 2010-14)
	Naval Vessels	INS Vikramaditya (refurbished)	$2.35 billion	12%	N/A
	Tanks	310 T-90S Bhishma tanks	$1.2 billion	6.5%	-3%
2015-2019	Air Defence Systems	S-400 Triumph (5 systems)	$5.43 billion	39%	-16% (from 55% in 2015-19)

	Joint Ventures	BrahMos cruise missile production	$1.1 billion	7.8%	1.3%
2020-2025	Small Arms	AK-203 assault rifles (co-production)	$670 million	9.8%	JV formed in Feb'2019.Co-production and co-development deal signed in February 2021.
	Technical Maintenance	Spare parts for legacy systems	$3.2 billion	18%	-18%

Data Sources: -

1. https://www.drishtiias.com/daily-updates/daily-news-analysis/india-2nd-largest-arms-importer-sipri
2. https://militarywatchmagazine.com/article/india-s-su-30mki-costs-almost-twice-as-much-as-russia-s-new-su-30sm-here-s-why
3. https://www.business-standard.com/article/current-affairs/why-did-ins-vikramaditya-s-cost-go-from-974-mn-to-2-35-bn-cic-asks-navy-117052100257_1.html
4. https://thediplomat.com/2019/11/indias-defense-ministry-signs-2-8-billion-deal-for-464-t-90ms-main-battle-tanks/
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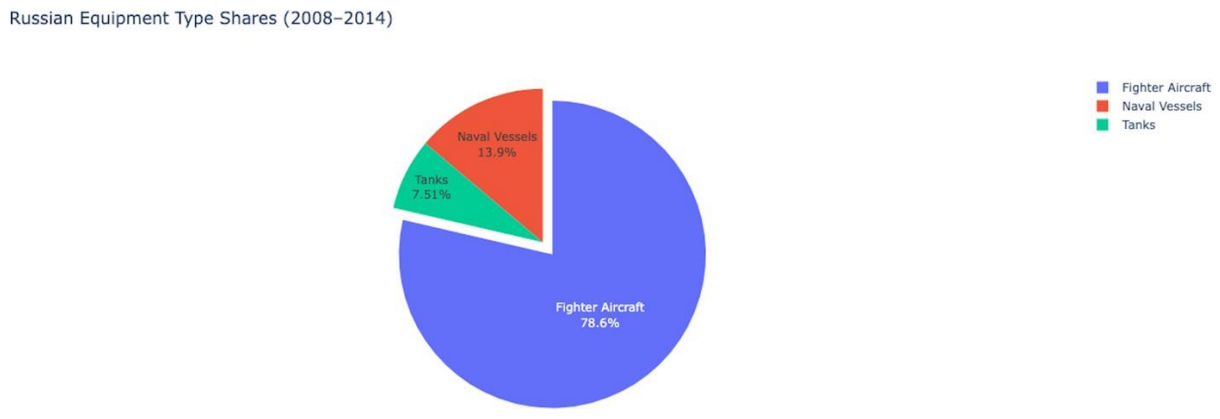

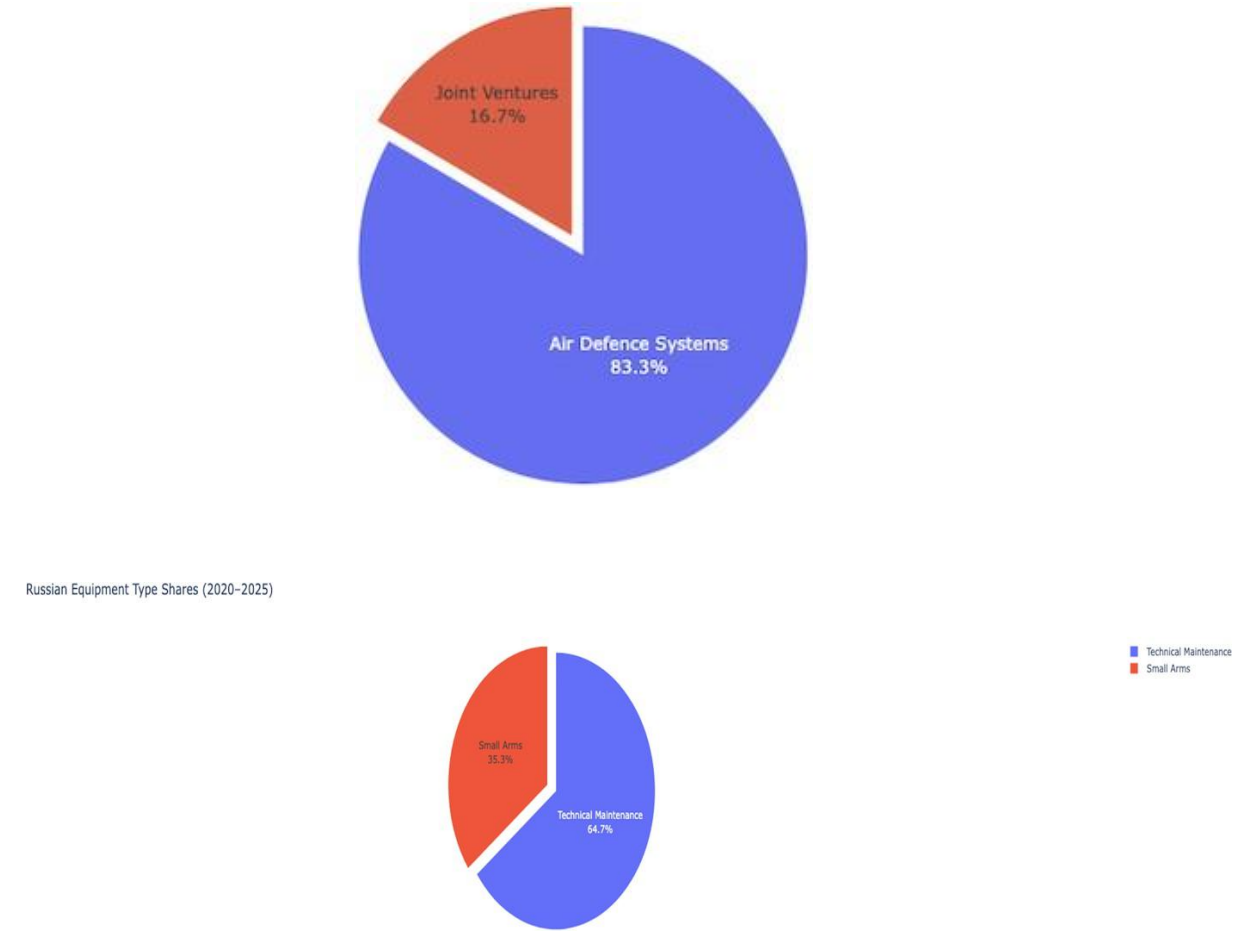

Figure 6:Evolution of Russia's Equipment Type Share-Time Series Pie Charts

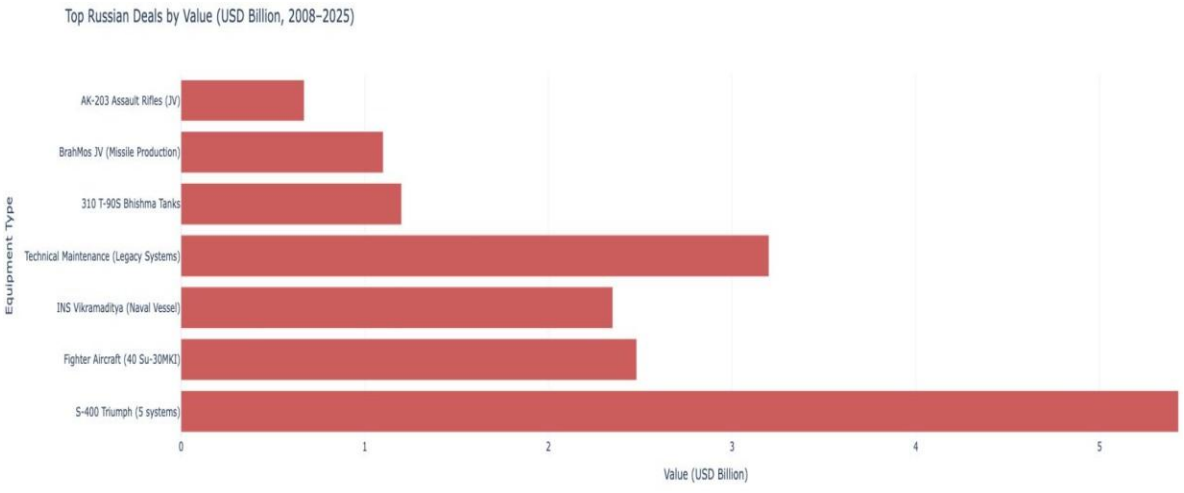

Figure 7:Top Russian Deals by Value (in USD Billion)

Historically, Russia has been India's foremost defense partner. However, in the 2015–2025 period its role has diminished markedly. SIPRI and industry reports confirm a steep fall in Russia's share: from ~58% of India's imports in 2014–18 to about 36% in 2019–23 (Stambamkadi,2025). This shift is rooted in both practical and geopolitical factors. Russia's 2022 invasion of Ukraine disrupted its arms supply chains and access to Western components. As one analysis notes, India canceled or delayed several planned upgrades of Russian systems (e.g. Su-30MKI fighter upgrades, Ka-31 AWACS helicopters) due to delivery delays and payment issues under sanctions (Stambamkadi,2025). Russia's deepening alliance with China (e.g. their 2022 "no limits" pact) also raised Indian security concerns, given fears of Chinese technology seeping into Russian weapons (Stambamkadi,2025).

The Russia-India defense relationship became increasingly characterized by joint ventures and co-production arrangements rather than simple buyer-seller transactions. The establishment of the AK-203 assault rifle production facility in India exemplifies this evolution, reflecting Russia's adaptation to India's growing emphasis on technology transfer and domestic manufacturing. Despite these adaptations, several factors contributed to Russia's declining share:

- Concerns about timely delivery and cost overruns in major projects such as the refurbishment of Admiral Gorshkov (INS Vikramaditya).
- Increasing competition from Western and Israeli suppliers offering advanced technologies with fewer restrictions.
- The impact of Western sanctions on Russia's defense industrial base following the Ukraine conflict.
- India's strategic rebalancing toward greater partnership with the United States and its allies.

United States of America: Steady Partnership with Niche Technology Transfers

Period	Equipment Type	Specific Systems	Monetary Value (USD)	% Share of Total Imports (Period)	Trend (vs. Previous Period)
2008-2014	Transport Aircraft	10 C-17 Globemaster III	$4.1 billion	11%	3%
	Maritime Patrol	8 P-8I Poseidon	$2.2 billion	6%	1.5%
2015-2019	Attack Helicopters	22 AH-64E Apache	$1.4 billion	8%	2%
	Artillery	145 M777 Howitzers	$737 million	4%	1%
	Air Defence Systems	NASAMS-II Air Defence Unit	$800 million	4.5%	0.5%
2020-2025	Unmanned Systems	30 MQ-9B Predator drones	$3.1 billion	13%	5%

Data Sources: -

1. https://www.sipri.org/media/press-release/2025/ukraine-worlds-biggest-arms-importer-united-states-dominance-global-arms-exports-grows-russian
2. https://www.sipri.org/sites/default/files/files/FS/SIPRIFS1003.pdf
3. https://www.sipri.org/sites/default/files/2025-03/fs_2503_at_2024_0.pdf
4. https://www.indexmundi.com/facts/indicators/MS.MIL.MPRT.KD

Arms cooperation with the United States has steadily strengthened. Although a late entrant to India's procurement scene, U.S. suppliers now occupy roughly 10–15% of the market. The U.S. share has grown due to several major contracts for transport, helicopters, naval

systems, and (most recently) unmanned systems. Notable deals include 10 C-17 Globemaster III transports-$4.1B approved in 2011 (Reuters, 2011)), 8 P-8 Poseidon maritime patrol aircraft - $2.1B in 2009 (Reuters, 2011), Apache attack helicopters, HIMARS rockets, and most recently 30 MQ-9B Predator drones (~$3.1B in 2022). In 2015–19 the U.S. made up ~8% of India's imports; by 2020–24 this rose to 13% (Kumar, 2025).

Beyond hardware, U.S.-India relations have deepened via defense agreements (COMCASA, BECA) and co-development initiatives. U.S. suppliers emphasize technology transfer (e.g. GE and Pratt & Whitney engine production in India) and offset partnerships (such as Boeing's joint venture to build C-17 wings in India). These agreements enabled India to access advanced US military technology with greater confidence in secure communications and data sharing.

The US approach to defense sales to India emphasized long-term strategic partnership rather than transactional relationships. This was evident in the willingness to offer increasingly advanced technologies and the establishment of the Defense Technology and Trade Initiative (DTTI) to facilitate cooperative research and development projects. The U.S. success is partly political. Washington sees India as a strategic partner in the Indo-Pacific and has granted it "Major Defense Partner" status, easing the flow of advanced technology. As one analyst observes, shared geopolitical interests and India's Make-in-India push have jointly motivated the pivot to the U.S. as a supplier (MP-IDSA, 2025).

France: Exponential Growth driven by Mega-Deals

Period	Equipment Type	Specific Systems	Monetary Value (USD)	% Share of Total Imports (Period)	Trend (vs. Previous Period)
2008-2014	Submarines	6 Scorpene-class (Project 75)	$4.8 billion [1]	6.8% [1]	N/A
2015-2019	Fighter Aircraft	36 Rafale jets	$8.7 billion [1]	33% [1]	+26.2%
2020-2025	Naval Aviation	26 Rafale-M (proposed)	$6.2 billion [1]	29% [1]	-4%
	Precision Munitions	1,000 AASM Hammer missiles	$550 million [1]	2.5% [1]	+1%

Data Sources: -

1. https://www.sipri.org/sites/default/files/2025-03/fs_2503_at_2024_0.pdf
2. https://www.sipri.org/media/press-release/2024/european-arms-imports-nearly-double-us-and-french-exports-rise-and-russian-exports-fall-sharply
3. https://theprint.in/defence/india-remains-worlds-largest-arms-importer-france-overtakes-russia-in-global-sales-finds-sipri/1996134/
4. https://compass.rauias.com/current-affairs/international-arms-transfers-2023-report-sipri/
5. https://currentaffairs.adda247.com/india-tops-global-arms-imports-sipri-report/
6. https://www.thehindu.com/news/national/india-second-largest-arms-importer-after-ukraine/article69313894.ece
7. https://www.drishtiias.com/daily-updates/daily-news-analysis/india-2nd-largest-arms-importer-sipri/print_manually

The most dramatic transformation in supplier relationships occurred between India and France. France's share of India's arms imports surged from approximately 6.8% in 2008-2014 to 33% by 2015-2019, establishing it as India's second-largest arms supplier. This exponential growth was primarily driven by the deal for 36 Rafale fighter jets, which represented not just a significant procurement but a strategic shift toward European suppliers for critical platforms. The Rafale acquisition was notable not only for its size but also for the technology transfer components and offset arrangements that accompanied it. France's willingness to provide

advanced weapons systems without intrusive end-use monitoring or technology transfer restrictions made it an increasingly attractive partner for India.

The relationship further deepened with negotiations for additional Rafale aircraft for the Indian Navy and the potential acquisition of Scorpene-class submarines, reflecting France's growing role across multiple domains of India's military capabilities. By 2025, France had established itself as a preferred partner for high-value, technologically advanced platforms, with an emphasis on naval and air force modernization.

Several factors contributed to France's growing prominence:-

- Minimal political conditions attached to arms transfers compared to both US and Russian alternatives.
- Willingness to engage in technology transfer and co-production arrangements.
- Strong performance of French equipment in operational use.
- France’s position as a major European power with an independent foreign policy aligned with many of India’s strategic objectives.

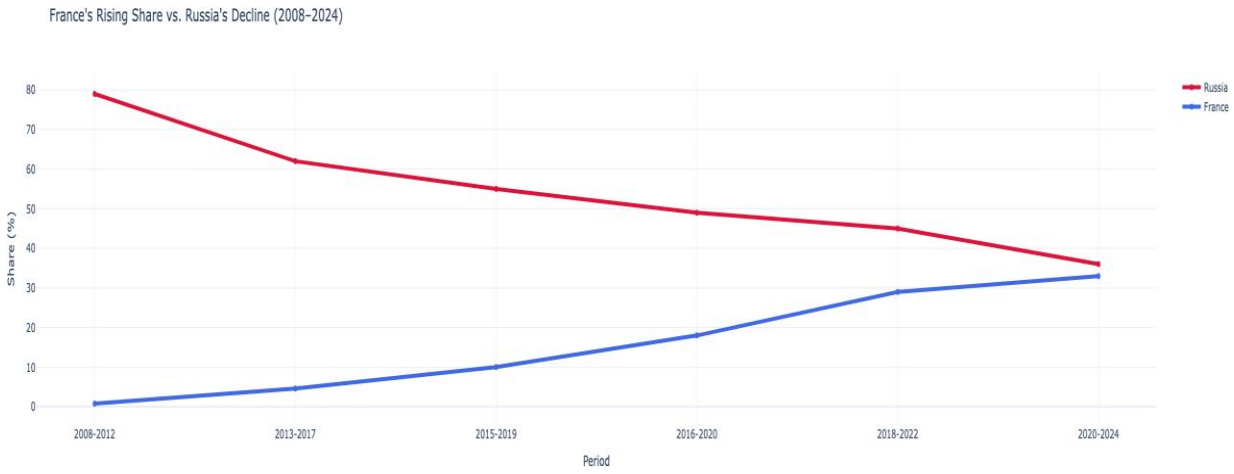

Figure 8:Supplier landscape-France's Rising Share v/s Russia's Decline

Israel: Specialized Systems with Stable Market Share

Period	Equipment Type	Specific Systems	Monetary Value (USD)	% Share of Total Imports (Period)	Trend (vs. Previous Period)
2008-2014	Air Defence	Spyder missile systems (18 units)	$1.1 billion	4%	0.5%
	UAVs	Heron TP drones (50 units)	$500 million	1.8%	0.3%
2015-2019	Missile Defence	Barak-8 systems (joint development)	$2.3 billion	7%	3.2%
	Radar Systems	EL/M-2084 radars and border surveillance tech	$600 million	1.8%	0.5%
2020-2025	Electronic Warfare	EL/M-2084 radars and counter-drone systems	$1.4 billion	5%	-2%
	Precision Munitions	Spike anti-tank missiles and guidance kits	$900 million	3.2%	1.5%

Data Sources:

1. https://www.orfonline.org/expert-speak/the-deepening-of-india-israel-defence-ties
2. https://www.reuters.com/business/aerospace-defense/israels-military-exports-top-buyer-india-unaffected-by-gaza-war-2024-02-23/
3. https://idsa.demosl-03.rvsolutions.in/publisher/issuebrief/india-israel-defence-trade-and-defence-indigenisation/
4. https://thediplomat.com/2024/11/india-israel-defense-and-security-cooperation/

Israel maintained a specialized but stable role in India's arms import portfolio, with its share fluctuating between 4% and 7% throughout the period. Israel's contribution was characterized by niche technologies in areas such as unmanned aerial vehicles, radars, missiles, and electronic warfare systems. The cornerstone of the Israel-India defense relationship during

this period was the continued development and deployment of the Barak-8 air defense system, jointly developed by Israel Aerospace Industries and India's Defence Research and Development Organisation (DRDO). This collaboration exemplified Israel's approach of combining direct sales with technology transfer and joint development.

Other key acquisitions include Spyder anti-air missile batteries, Harpy/Harop loitering munitions, and Heron UAVs. Israel’s market share in India fluctuated modestly over 2008–2025 (peaking during Barak-8 deliveries) but has held steady overall. Indian buyers value Israeli technology in radar, electronic warfare, and precision munitions, often integrating them into broader Indo-Israeli joint projects. Israel’s defense exports to India have grown with the relationship. India is Israel’s largest arms market, and defense collaborations (e.g. Elbit systems and Bharat Dynamics for Spike missiles) continue to expand. Thus, Israel remains a key mid-ranked supplier, providing specialized systems that complement India’s broader procurements.

Supplier Shares by Equipment Type

The evolution of India's arms import patterns between 2015 and 2025 reveals distinct specialization patterns among major suppliers across different equipment categories. These patterns reflect both the traditional strengths of supplier nations and India's strategic priorities for capability development.

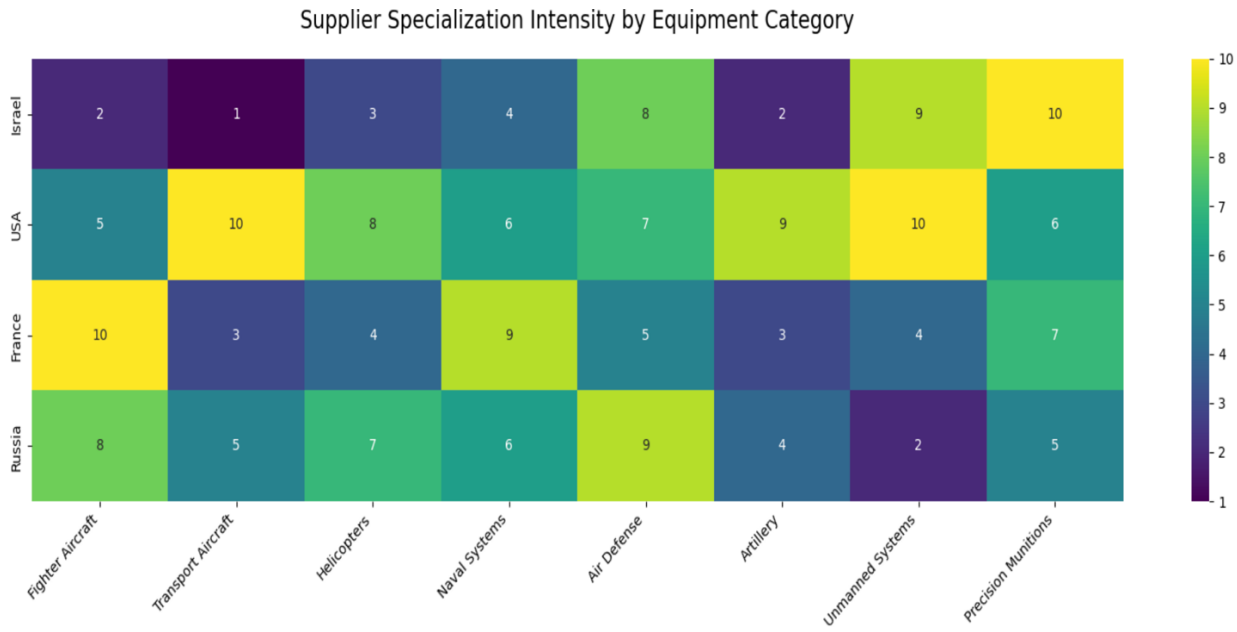

Figure 9:Heatmap depicting the intensity of supplier specialization by equipment category (Made by author from data tables cited in the previous section using Python)

Air Defense Systems

Russia remained the dominant supplier in the air defence category, with the S-400 Triumph system ($5.43 billion) representing the single largest acquisition during this period. However, Israel made significant inroads through the jointly developed Barak-8 medium-range surface-to-air missile system, while the United States contributed through the NASAMS-II (National Advanced Surface-to-Air Missile System) worth approximately $800 million. By 2025, Russia's share in this category had declined from near-monopoly to approximately 60%, with Israel capturing around 25% and the US approximately 15%.

Combat Aircraft

The combat aircraft segment witnessed the most dramatic shift in supplier dominance. Historically dominated by Russia through the Su-30MKI program, this category saw France emerge as the leading supplier following the Rafale acquisition. By 2025, France accounted for approximately 45% of India's combat aircraft imports, Russia's share had declined to 30%, and the remainder was distributed among other suppliers, including indigenous platforms supplemented with imported components.

Naval Vessels

Naval acquisitions reflected a more balanced distribution among suppliers. Russia continued to provide submarines and frigates, France supplied Scorpene-class submarines, and indigenous production (often with foreign components and technical assistance) accounted for an increasing share. By 2025, Russia's share in naval acquisitions had declined to approximately 45%, France accounted for 30%, and indigenous production with varying degrees of foreign input made up the remainder.

Unmanned Systems

The unmanned systems category saw the United States emerge as the dominant supplier by 2025, primarily through the $3.1 billion deal for 30 MQ-9B Predator drones. Israel maintained a significant presence in this category through smaller tactical UAVs and components. By the end of the period, the US accounted for approximately 55% of India's unmanned systems imports, Israel for 35%, and other suppliers for the remainder.

Land Systems and Artillery

Land systems demonstrated the most successful indigenization efforts, with a significant reduction in imports by 2025. Among the imports that continued, the United States was

prominent through the M777 Howitzer deal, while Russia maintained a presence through tank upgrades and maintenance contracts. France and Israel provided specialized sub-systems. By 2025, the US accounted for approximately 40% of land system imports, Russia for 35%, and the remainder was distributed among other suppliers.

STRATEGIC IMPLICATIONS – ASSESSING HOW THESE CHANGES AFFECT INDIA'S STRATEGIC POSITIONING AND MILITARY CAPABILITIES.

The evolving patterns of India's arms imports during 2015-2025 carry significant strategic implications for its military capabilities, diplomatic relationships, and geopolitical positioning.

Diversified Dependency

The most immediate strategic implication of India's supplier diversification is the transformation from overwhelming dependence on a single supplier (Russia) to a more balanced dependency on multiple sources. This diversification will reduce India's vulnerability to supply chain disruptions or political pressures from any single source, enhancing its strategic autonomy (Kaushik, 2024). However, it will also create new challenges in terms of interoperability, maintenance logistics, and training requirements for systems from different origins. The Russia-Ukraine conflict of 2022 has highlighted the wisdom of this diversification, as sanctions against Russia created potential disruptions in the supply of spare parts and maintenance for India's substantial inventory of Russian equipment. India's alternative supplier relationships have provided critical redundancy during this period of uncertainty (Kaushik, 2024).

Enhanced Technological Access

The diversification of suppliers has significantly expanded India's access to advanced military technologies that might have been unavailable from a single source. Different supplier

nations have distinct technological advantages: France offers sophisticated fighter aircraft technology, the US provides advanced networking and surveillance capabilities, Israel excels in unmanned systems and electronic warfare, and Russia continues to provide certain unique capabilities such as advanced air defence systems.

This technological diversification has enabled India to construct a more comprehensive and balanced military capability than would have been possible through reliance on any single supplier. As of 2025, India's military possesses a much wider spectrum of technological capabilities than it had in 2015, particularly in areas such as network-centric warfare (NCW), precision strikes, and intelligence, surveillance, and reconnaissance (ISR).

Diplomatic Leverage

The distribution of arms procurement among multiple suppliers provides India with increased diplomatic leverage in its international relationships. Arms sales typically create long-term relationships due to the need for maintenance, upgrades, and training, giving supplier nations a vested interest in maintaining positive relations with India. By diversifying suppliers, India has effectively expanded the number of countries who'll have a significant stake in their bilateral relationship. This diplomatic leverage will prove particularly valuable in multilateral forums and during international crises, where India could count on a broader support base. The arms procurement relationships also facilitated deeper cooperation in other domains, including economic partnerships, intelligence sharing, and joint military exercises.

Balancing Act in Great Power Competition

India has carefully crafted a defense acquisition approach that reflects its determination to maintain independence amid the increasingly tense US-China rivalry, while Russia remains both

China's partner and India's long-standing arms supplier. Rather than picking sides, India has stubbornly pursued relationships with Western nations and Russia simultaneously – a practical demonstration of its commitment to strategic autonomy rather than binding itself to any single power bloc.

This juggling act hasn't been easy, especially as relations between Washington and Moscow plummeted after Russia's invasion of Ukraine. I've observed how India faced significant American pressure over its Russian purchases, particularly the S-400 missile defense system, which risked triggering CAATSA sanctions. Yet somehow, India managed to dodge these diplomatic landmines while keeping dialogue open with all major powers – a testament to its growing diplomatic skill and nuanced understanding of international power dynamics.

But this diversification strategy comes with its own headaches. Having weapons from multiple countries creates real-world complications for India's military. Just imagine trying to coordinate operations when your aircraft, ships and tanks all speak different technical languages! The logistics nightmare of maintaining spare parts from various suppliers can't be overstated. Sometimes older systems are retired before new ones are fully operational, creating dangerous capability gaps that enemies might exploit. The transition periods between phasing out aging Russian equipment and bringing in Western or homegrown alternatives have occasionally left India vulnerable, with replacement timelines rarely matching retirement schedules perfectly.

Impact on Regional Military Balance

The qualitative improvement in India's military capabilities resulting from access to advanced technologies has affected the military balance in South Asia and the broader Indo-

Pacific region. India's acquisition of capabilities such as the Rafale fighter jets, S-400 air defense systems, and MQ-9B drones has significantly enhanced its conventional deterrence posture vis-à-vis Pakistan and provided some countermeasures against China's growing military capabilities (Kaushik, 2024).

However, these acquisitions also trigger response cycles, with Pakistan seeking to offset India's conventional advantages through asymmetric means, including tactical nuclear weapons and support for non-state actors. China will continue its military modernization at a pace that India will struggle to match, despite its diversified procurement strategy. By 2025, India had achieved a more balanced and technologically advanced military force through its diversified procurement strategy, but it still faces significant challenges in addressing the capability deficit with China and managing the proxy threats from Pakistan.

Policy Analysis: Answering our Key Research Questions

What factors have driven India's diversification away from Russian arms imports?

The diversification was driven by a combination of push and pull factors. Push factors included concerns about reliability and after-sales support for Russian equipment, delivery delays and cost overruns in major projects such as the Admiral Gorshkov aircraft carrier (INS Vikramaditya), and the impact of Western sanctions on Russia's defense industry following the Ukraine conflict (Kaushik,2024). Pull factors included the technological attractiveness of Western and Israeli systems, the alignment of defense procurement with broader strategic partnerships, and the willingness of new suppliers to offer favourable terms including technology transfer and offset arrangements.

How effective has India's self-reliance initiative been in reducing dependency on foreign suppliers?

The self-reliance initiative has shown significant but uneven progress. By 2025, several notable indigenous systems have entered service, defense exports had grown 30-fold since 2013-14, and the percentage of import content in Indian defense acquisitions has declined (Ministry of Defence, 2025). However, critical technological gaps remain in areas such as aircraft engines, advanced sensors, and certain categories of electronic systems. The initiative has been most successful in naval platforms, artillery systems, and armoured vehicles, while aerospace remains more dependent on foreign inputs (Geostrata, 2023). The overall trajectory is positive, but complete self-reliance in advanced defense technologies remains a distant goal.

What strategic advantages and vulnerabilities arise from the changing supplier relationships?

The diversified supplier base has enhanced India's strategic autonomy by reducing leverage from any single country, provided access to a wider spectrum of technologies, and created diplomatic benefits through expanded relationships. However, it has also created new vulnerabilities in terms of increased system complexity, potential interoperability challenges, and more complex supply chains. The transition period between legacy Russian systems and newer Western or indigenous platforms has also created temporary capability gaps that potential adversaries could exploit.

How do technological requirements influence India's choice of suppliers?

Technological requirements have been a major driver of supplier diversification, with different nations selected based on their comparative advantages in specific domains. France became the preferred supplier for advanced fighter aircraft, Russia maintained its role in air defense systems, the United States provided advanced networking and surveillance capabilities, and Israel leads in unmanned systems and electronic warfare. This technology-driven selection process has allowed India to optimize its military capabilities while managing the challenges of a multi-supplier ecosystem.

What are the geopolitical implications of India's shifting arms import patterns?

The geopolitical implications are substantial. The shift from overwhelming dependence on Russia toward a more balanced procurement strategy aligns with India's broader strategic trajectory of multi-alignment rather than formal alliance (Lieberherr,2024). The expanded defense relationships with Western democracies reinforce India's position in the Indo-Pacific strategic architecture, without abandoning its traditional ties with Russia. This balanced approach has enhanced India's diplomatic agility and reinforced its identity as an independent strategic actor rather than a member of any power bloc.

Future Projections

Based on the trends observed during 2015-2025 and the strategic trajectory established by India's defense planning, several projections can be made regarding the future evolution of India's arms import patterns beyond 2025.

Continued Decline in Import Dependence

The most probable projection is the continued gradual decline in India's overall arms import volumes as a percentage of defense expenditure. This decline is likely to be driven by

three factors: increasing success of indigenization efforts, fiscal constraints necessitating more cost-effective procurement, and the maturing of co-production arrangements that blur the line between imports and domestic production.

By 2030, India's arms imports may constitute less than 50% of major platform acquisitions by value, compared to approximately 65% in 2025. However, this decline will not be uniform across all equipment categories. Areas such as naval surface vessels, artillery systems, and armoured vehicles will likely see faster indigenization, while advanced aircraft, submarine technologies, and electronic systems will continue to rely significantly on external input.

Evolving Supplier Relationships

Russia's share of India's arms imports is projected to stabilize at approximately 25-30% by 2030, representing a new equilibrium after the sharp decline witnessed during 2015-2025 (Kaushik,2024). This stabilization will be driven by several factors: the continued need for spares and upgrades for the substantial inventory of Russian equipment in service, ongoing joint development projects such as BrahMos, and Russia's competitive offering in specific niches such as air defense and certain categories of naval equipment. France is likely to maintain its elevated share of 25-30%, solidifying its position as a preferred supplier for high-end platforms, particularly in the aerospace and naval domains. The potential acquisition of additional Rafale aircraft for the Indian Navy and further cooperation on submarine technology would sustain this relationship.

The United States may see a modest increase in its share to 20-25%, driven by expanding cooperation in emerging domains such as space, cyber, and unmanned systems. The deepening

strategic partnership between the two countries in response to China's assertiveness will likely translate into increased defense trade, particularly for maritime domain awareness capabilities and advanced ISR systems. Israel's share is projected to remain stable at 7-10%, maintaining its niche in specialized systems, electronic warfare, and unmanned platforms. The relationship may expand to include more joint development projects following the successful model of the Barak-8 system.

New entrants from Europe (such as Germany, Spain, and Italy) and potential suppliers from regions not traditionally significant in India's procurement (such as South Korea and Japan) may collectively account for 10-15% of imports by 2030, reflecting India's continuing strategy of diversification and its search for the best technologies.

Transition to Co-development Models

The traditional buyer-seller model of arms imports is projected to increasingly give way to collaborative development arrangements. These arrangements, exemplified by projects like BrahMos (with Russia) and potentially new initiatives with Western partners, allow India to participate in the development process while still leveraging foreign technological expertise. By 2030, as many as 40% of major defense acquisitions involving foreign suppliers may follow co-development or co-production models rather than direct off-the-shelf purchases. This shift will further blur the distinction between imported and indigenous systems, requiring more nuanced metrics for measuring self-reliance than simple import volume statistics.

Conclusion: Future Outlook

Looking ahead to 2030 and beyond, the trends suggest continued diversification and indigenization. India will likely further expand co-development with the U.S., France, and Israel while steadily increasing domestic content. Future deals are expected to include more maritime and aerial systems with Western partners (e.g. second-hand aircraft carriers or submarines, joint projects for 5th-generation jets or UAVs). The ambitious 75% domestic procurement target signals that imports will plateau or decline even as spending grows. Analysts foresee India's arms import share continuing to shrink as local production and regional co-production grow (Ahuja,2023).

Geopolitically, India may emerge as not only a major buyer but eventually an exporter to friendly states, especially in the Indian Ocean region. If domestic production goals ($22B industry by 2025) are met, India could become a source for smaller neighbours or partners (as hinted by the recent BrahMos exports). Strategically, India will aim to secure a reliable defense-industrial network: for example, further integration under the U.S. Major Defense Partner framework. For e.g. i-CET projects, INDUS-X, or deals like engine production with GE(Kumar, 2024).

However, risks remain. If global tensions (e.g. a prolonged Ukraine war or new crises) stress supply chains, India might have to pivot unexpectedly. Its dual approach—maintaining Russian platforms while pursuing Western tech—will test its commitments and its diplomatic character. On balance, experts project that by mid-2030s, India's defense imports will be far more balanced. Russia may remain a supplier of legacy spares and Soviet-era platforms, but new procurements will be predominantly Western or homegrown (George et al., 2025). Ultimately, India's strategic objective is clear: to field a modern military with diverse capabilities from a

diversified supplier base, thereby strengthening its position in a competitive regional and geopolitical order.

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